LEARNING OPERATIONS INSTRUCTIONAL DESIGN TEAM
LEARNING GOVERNANCE

How This Document Is Revised

- Instructional designers (IDs) will add any proposed revisions using columns A and B of this Excel document.
- IDs will meet at least every other week to discuss our Learning Governance and any revisions/additions we need to make to it, based on the proposed revisions.
- Any urgent questions or proposed revisions between meetings can be posed in the ID Team chat in Microsoft Teams.
- The Lead ID and at least 2 other IDs need to be present for the meeting to take place, in which case all 3 instructional designers must agree on a proposed change to Learning Governance for the change to go live. The ID not present should review any updates and voice any objections, questions, or concerns as soon as they're able.
- The Lead ID will revise this document based on discussions.

How to Use This Document

- IDs will use this document as a checklist while they design and review their work to ensure compliance and consistency across deliverables.
- The Learning Operations Manager will use this document as a checklist while reviewing content to provide feedback consistent with the standards therein.
- Content should not be submitted for review until the ID has made sure it's 100% in compliance with these guidelines.

Refer to the Inclusion & Accessibility Governance standards checklist for additional guidelines.

Writing for Instructional Design

Regardless of the deliverable, designers should use the following guidelines for their writing.

- Use active voice (vs passive).
    - Start sentences with the subject and the verb right next to each other.
- Use a conversational tone.
    - Use contractions (e.g., "you'll," "they've," won't").
    - Use second person to address the learners (i.e., "you"), including in section titles.
    - Use shorter, simpler terms (whenever possible) and sentences (avoid using semi-colons).
- Write as few words as possible.
    - Only write content that connects to the learning objectives.
        - Exceptions are templatized content/instructions.
    - Remove words that do not help learners understand the content (trim the fat).
- Use of first person (our, we).
    - Writing in first person is okay for ILT courses.
    - When using first person in eLearning, ensure that it's clear who "our" and "we" is referring to.
    - Avoid using first person (our, we) when referring to a company or brand. Use the name instead (Cox Automotive, Manheim).

- Acronyms
    - Spell out on first instance.
    - Do not use the acronym until it has been defined with parentheses.

      Example: NextGear Capital (NGC), Cox Automotive Mobility (CAM)

    - This applies to course titles, section titles, and section content.
- Title and Heading Capitalization
    - If the section title or heading is a complete sentence, then format it using Sentence Case capitalization.
    - If the heading is not a complete sentence, use Title Case Capitalization (i.e., lowercase the non-important words):
        - Capitalize the first and last words in titles and subtitles, and capitalize all other major words (nouns, pronouns, verbs, adjectives, adverbs, and some conjunctions).
        - Lowercase the common coordinating conjunctions *and*, *but*, *for*, *or*, and *nor*.
        - Lowercase the articles *the*, *a*, and *an*.
        - Lowercase prepositions, regardless of length, except when they are used adverbially or adjectivally (*up* in *Look Up*, *down* in *Turn Down*, *on* in *The On Button*, *to* in *Come To*, etc.) or when they compose part of a Latin expression used adjectivally or adverbially (*De Facto*, *In Vitro*, etc.).
        - Lowercase *to* not only as a preposition (rule 3) but also as part of an infinitive (*to Run*, *to Hide*, etc.), and lowercase *as* in any grammatical function.
    - The primary title (i.e., the course title) should not be written as a complete sentence and always be written in Title Case.
- Bulleted Lists:
    - Ensure items in a bulleted list are consistently worded and structured (e.g., all complete sentences or not).
    - Lists with five or more things should be converted to bullets for better readability and white space.
- Preferred Word Choice
    - Clients vs. Customers
        - Dealers should be called clients. The dealer's customers can still be referred to as customers.
    - Role-Play vs. Skills Practice
        - Avoid using "role-play"; use "skills practice" instead.
- Instructions
    - Number instructions when there's more than one step in the section.
    - Push numbers to far left margin.
    - Start with the verb.
    - Use generic verbs that work with any input method/device.

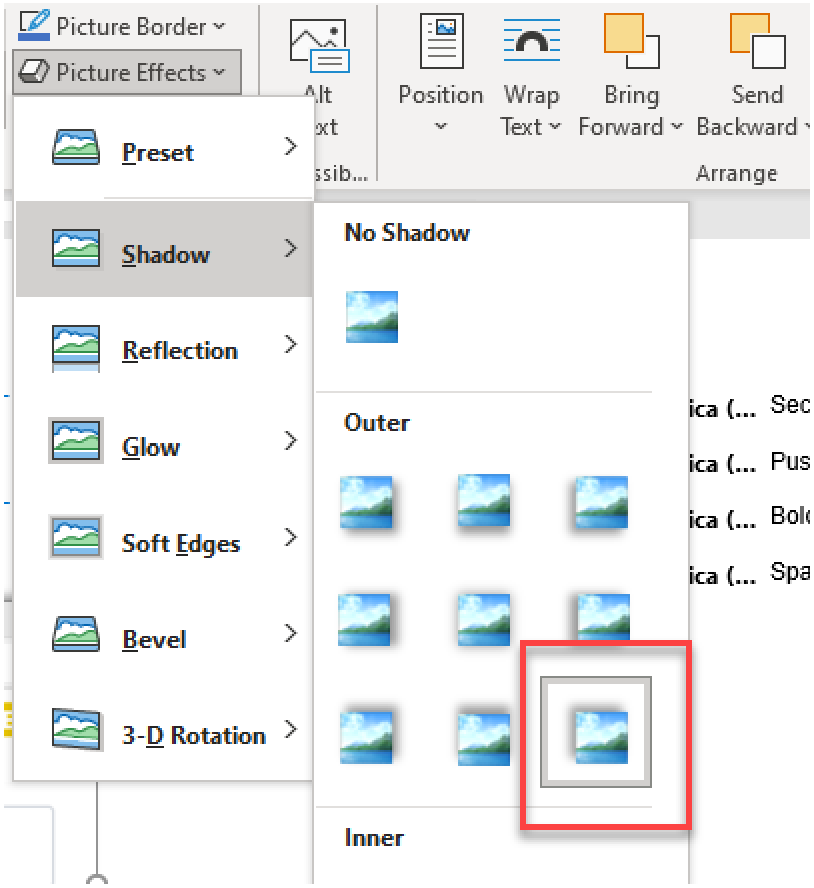
      Note: Refer to this article for specific verbs and examples.

    - Use one action per step.
    - Bold labels functioning as objects of actions (i.e., text that a user presses, clicks, or selects in a user interface or on a keyboard).

      Example: Select **Create Account**.

    - Whenever possible, include an image to illustrate the step, and place it left-aligned to the text directly under the step.

- Use a drop shadow for all images, offset: top left, default settings.



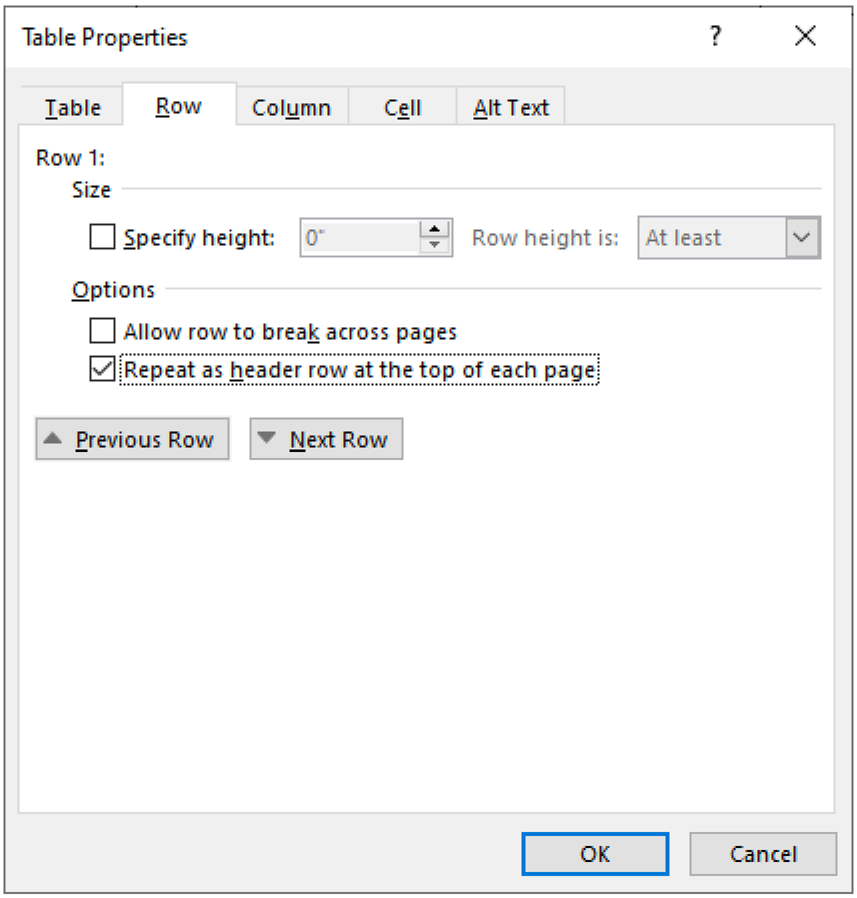
- Separate notes (things learners should know and not do) from instructions with white space and format them like this (left-aligned with the step it corresponds to):

  Note: Word saves documents automatically as you work.

Job Aids (e.g., Quick Reference Guides, Manuals, FAQs, etc.)

- Margins: Narrow (.5" all around)
- Arial font throughout
- Title should be left-aligned, 22 pt, bold, hex #00528A
- Who is this for? (roles), 18 pt hex #00528A
- What is this for? (What it will help them do), 18 pt, hex #00528A
- What do you need? (What they need to do it), 18 pt, hex #00528A
- Section headers per task
  - 14 pt, bold, black
  - If the section header begins with a verb, use the -ing form of the verb (e.g., "Creating an Account" is preferred over "Create an Account")
- Body copy (steps and notes), 12 pt, black
  - See "Instructions" section in the "Writing for Instructional Design' section above.
- Footer (.3" from bottom margin)
  - COX AUTOMOTIVE™ Current Cox Automotive logo, color, inline, (.png) (2" w x .37" h), left
  - Include a "For internal use only - date" in center, hex #4D4D4D, 10 pt

    - Page #s, right, hex #4D4D4D, 10 pt
- Include a “For more information” section if there are additional relevant resources
- Keep the step and image together on the same page.
    - Make the image smaller or crop if possible to prevent the image from moving to the next page.
- If there is a large table that breaks across pages:
    - Ensure that “Allow row to break across pages” is unchecked so that rows don’t break across pages.
    - Repeat the header at the top of each page by following these steps:
        - Select the header.
        - Right-click and select **Table Properties**.
        - Select **Repeat as header row at the top of each page**.
          Note: Refer to this article for troubleshooting if this does not work.



- If there are conditional steps/statements, format it like this:

    1. Do this step.

       If this happens: *(Add a half space between this and the lettered steps, like 6 pts. if your font is 12 pt.)*

       a. Do this.
       b. Then this.
       c. Finally this.

       If this other thing happens:

a. Do this.
b. Then this.
c. Finally this.

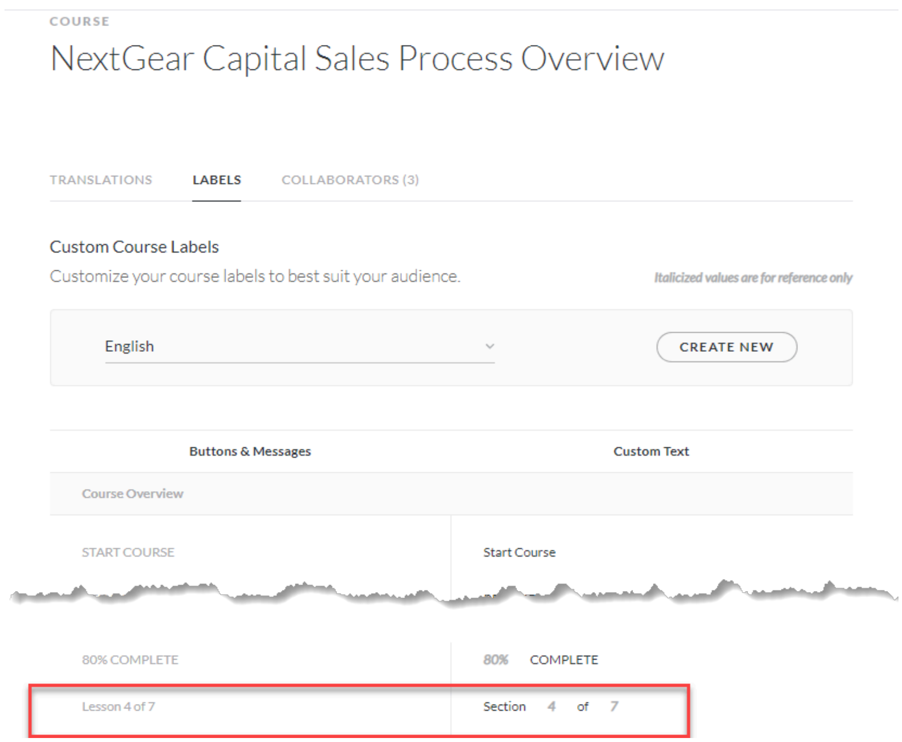
- The final deliverable for the job aid should be in PDF format.

E-learning: Rise Courses

For increased productivity and a more consistent experience for learners, start with the Rise SBO Course Template* that includes most of the guidelines stated below; however, you are welcome to use whatever Theme you want.

*If you cannot access the template, please request to be added as a collaborator in Articulate 360.

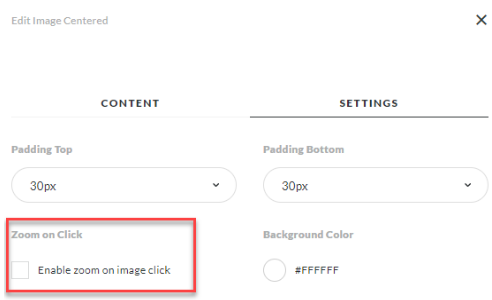
- Visual design
  - Use the same accent color for all courses in the same curriculum (e.g., we will be using the turquoise accent color [hex code: 088087] for the CAI Mobility courses).
  - For places where we want the learner to pause (e.g., "Show What You Know" header, "What's next?" header), use a background that spans across the course using an accent color that matches the theme of the course but also provides appropriate contrast (e.g., white text with a blue background [hex code: 002060]).
  - Use a "Show What You Know" header for questions in sections on content they just learned. The term "Knowledge Check" should be used to refer only to the scored assessment at the end of the course.
  - Use a "What's next?" header for transition statements.
- Welcome screen should include the following and nothing else:
  - the estimated completion time on the welcome screen.
    Note: Use your best judgement to estimate the time; however, if a reviewer feels that your estimation is too short or too long, then they will refer you to use the Mergener formula. More guidance on how to use this formula is provided here.
  - guidance for technical assistance on the welcome screen.
  - "Course updated: [date of update]" on the welcome screen regardless of the version.
- Hide the author's name
- Section vs. Lesson
  - Do not use the word "lesson" to refer to a Rise section.
  - Ensure that the Label for "Lesson" is updated to "Section."



- Sections
  - Include a section right after the welcome screen called “How do you get credit for this course?”
    - Include instructions for how to navigate the course
    - Include instructions about any transcripts, why they’re included, how to use them
    - Include instructions for what they need to do for the system to give them credit for completion, including viewing all section content and completing all activities, as well as completing the very last section
    - Include a knowledge check question at the bottom teaching them how to know if a section has been completed
    - Include the number of sections
    - Tell them if there’s a scored test
    - Tell them if they need to take a break, their progress will be saved, and they can resume where they left off when they come back.
  - Write section titles as conversational questions.
  - Include at least one instructional interaction in each section (interactive option, gallery, or knowledge check question) except for the “Why are you here?” and “What are the key takeaways?” sections.
  - Add a Continue button after all interactions/activities, so that those items are not skipped before.
  - Write instructions for every activity, and put them immediately before the activity (or at the top) in italics and spaced apart from body content so learners can skim for directions quickly and easily.
    - For videos, include in the directions the length of the video, the overall content, and what learners should watch/listen for to help keep them engaged and prepared for corresponding activities/quiz questions.
  - Write transition statements at the end of each section to help learners briefly recall what they learned in that section and connect the content to what's in the next section.
    - Use a “What's next?” header for transition statements.

- Do not have a “What's next?” transition statement in the “Why are you here?” section or the “What are the key takeaways?” section.

- Images and Screenshots
    - When referring to an image in the course, avoid referring to where the image since responsive design could change where the image displays (e.g., "The image to the left…”).
    - Ensure there is proper contrast between the screenshot/image and the course background to improve visibility. This can be done with a thin border (Width=1) applied in Snagit or by changing the background color of the block.
    - Disable zoom for non-informational images.



- Videos
    - Include in the directions:
        - the length of the video
        - the overall content
        - what learners should watch/listen for to help keep them engaged and prepared for corresponding activities/quiz questions
        - whether there’s a question after a video (e.g., “Watch for ______ so that you can answer the question(s) after the video.”)
    - Include a release date if known in the video or in a caption or a separate statement.
    - Include in a caption or separate statement if the video contains no speech.
    - Ensure that “Allow forward seeking” is enabled (default setting).
- Assessments/Key Takeaways
    - Allow learners to retry/retest so that they can learn from their mistakes.
    - Provide timely feedback to help the learner know what they got right/wrong and why.
    - Allow learners to review their responses so that they can understand where their mistakes are, what they got right, and where they can improve.
    - Scored Quiz:
        - Minimum number of questions: 5 (If learners miss one, they can still pass with the passing score being 80%.)
        - Maximum number of questions: the content should dictate how many questions there are based on the key takeaways from the course or sections (e.g., if there are seven very important things from that course that learners should remember, aim for seven questions in the quiz)
    - If there is not a scored quiz that helps reinforce key takeaways, then create a section on Key Takeaways (i.e., a simple bulleted list).
- Include a “Before You Leave” section at the end that includes:
    - a link to the MTM (Metrics that Matter) survey
    - a screenshot reminding them what their course needs to look like to show Completed
- Navigation Settings (Theme > Navigation)
    - Type: Sidebar

        - Begin with sidebar open: On
        - Navigation: On
        - Restrict Navigation: Off
        - Search: On
        - Marking Lessons Complete: Off
        - Video Playback Speed: On
    - Buttons:
        - Previous/Next Lesson Buttons:
            - On
            - Full Width
- Lesson Headers Settings (Theme > Lesson Headers)
    - Lesson Count Labels: Off
    - Author Avatar: Off
- Export Settings
    - Rise Quiz (i.e., the Knowledge Check)
        - Passing Score: 80%
        - Require Passing Score to Continue: On
        - Quiz Retries: Unlimited
        - Include in Lesson Count: On (default setting)
        - Continue Button Style: Standard Next Lesson
            - Question Options
                - Random Question Order: On/Off, based on quiz content
                - Shuffle Answer Choice: Off
                - Reveal Answers: On
    - Rise Course Export Settings
        - LMS: SCORM 1.2
        - Tracking
            - Track using course completion: 80% (not quiz result or Storyline block)
        - Reporting: Complete/Incomplete
        - Exit Course Link: Off
        - More Settings
            - Reset Learner Progress: Off

Writing Assessment (Knowledge Check) Questions

- Avoid using True/False questions. Have a really good, learner-centric reason if you choose to use this format, since they are difficult to make fair.
- Avoid asking learners what isn't correct vs. what is.

  Bad Example: Which of the following is not an example of . . .
  Good Example: Which of the following are examples of . . .

- Multiple-select questions:
    - In the question stem, if specifying a certain number (e.g., two, three), then bold or place in all caps the number.
    - Should have the following appear after the question: (Select all that apply.) OR (Select the two that apply.)
    - Cannot have "none of the above" or "all of the above" as an answer choice.

- Questions must be fair:
    - Clear – Starting with a question word (e.g., who, what, how, why, when, which, where)
    - Relevant – The answer to the question is included in the course. Must connect to a key point.
    - Approachable difficulty – Not too hard, not too easy
- Answer choices
    - Must be mutually exclusive (i.e., zero overlap between answer choices)
    - Must have parallel wording (e.g., must all be complete sentences, phrases, numerals, words; verb tenses should be the same; begin with the same word form)
    - Must be similar in length and complexity
    - Must be plausible in the context of the question and the correct answer (i.e., a piece of information found in the course)

      Note: Implausible answer choices are acceptable to insert moments of levity for the learner but must be used sparingly and with good purpose.

    - If numeric, making sure the intervals reflect a pattern and are in ascending or descending order
- Feedback
    - Incorrect feedback:
        - When they get it wrong, do not call out that they got it wrong (since Rise already does that automatically).
        - Provide where in the course/section the answer is found.
        - Explain why the answer is incorrect.
    - Correct feedback:
        - Make the first statement/word celebratory (e.g., High five! Kudos! Yes!).
        - Explain why the answer is correct.

Instructional Videos

- Include an intro with the title and appropriate logo(s)
- Music
    - Must be public domain, open source, free use
    - Use for intro, transitions, outro
    - For videos that are more fun, less complex, have a lighter cognitive load of content, you can use background music throughout, but it must be instrumental, and the volume must be significantly lower than any speakers' volume so that it doesn't compete or conflict
    - For videos that are more complex and have a heavier cognitive load of content, don't use background music during instructional audio
- For on-camera speakers, include their name and title on the lower third banner
- For static shots longer than 30 seconds, add an element to help keep learners engaged (text, graphics, B-roll, zooming in or out)
    - If the speaker is referencing or clicking on a particular area of a shared screen, edit the video to ensure that the learner can easily see and follow along with what the speaker is clicking or referring to.
    - When using shapes and opacity to call attention to something, be consistent with colors and style throughout the videos in the course/curriculum.

- Add graphics and/or text to on-camera speaker clips to emphasize and reinforce spoken information to help learners understand what's most important and to keep them engaged
    - If it obscures the speaker's face, use B-roll to add graphics and/or text
- Interactive videos
    - For videos longer than 10 minutes, create a Storyline course with a table of contents so learners can easily access topics as segments of the video, and include at least one question for each segment.
    - The videos should be in the table of contents with clear, concise, conversational titles and the duration of the video.
    - The videos should include a title slide.
    - Include a results slide at the end of the course.
    - If you're only using videos and questions, publish as a Storyline course. If you're using additional elements like explanatory text or other interactions, build and publish in Rise.
- Include key takeaways to help learners remember the most important information from the video
- Include an outro with an audio and video fade out so it doesn't end abruptly
- Project Settings:
    - Canvas Dimensions: 720p HD (1280 pixels x 720 pixels)
    - Frame Rate: 30 fps

Instructor-Led PowerPoint Presentations

- Go to Cox Auto Image Relay site to choose a current PowerPoint template:
    - For all sales, use Cox Auto widescreen template.
    - Otherwise, use the brand relevant to the topic(s)/learners.
- All ILT PPTs should have
    - Date indicated somewhere learners can easily access with the presentation
    - Title slide: title, presenter name(s)
    - Housekeeping:
        - tools learners will use in the training session
        - provide/confirm access to session materials
        - how and when learners can ask questions
        - microphones muted
        - reinforce how cameras should be used (if applicable)
            - camera expectations should be set in the meeting invite
            - cameras recommended for breakouts, but not for training longer than 60 minutes, facilitator should have their camera on if learners are expected to
    - Why are we here? Slide: states WIIFM for learners/learning objectives
    - Agenda: list of topics/activities in the correct sequence so learners know what to expect
    - Section break slides (**if** there are multiple sections, generally used for longer presentations)
    - Instructions for breakout activities provided on slide **if** there are breakouts (and accessible in breakout room)
    - Summary/Takeaways slide: recaps main learning topics/points
    - Q&A slide: **if** time permits
    - Additional resources slide: **if** applicable, provide links and/or SME names with contact info
    - Next steps slide: **if** there are next steps, number them on the slide in the right order
    - Survey slide with clickable link and/or QR code to MTM survey

Content Review: Feedback Practices for Reviewers and Authors

- Reviewers
  - Will leave comments with change requests based on the following questions:
    - Is it objectively wrong?
      - If not, is it distracting to the reviewer?
        - If not, does it create an unpleasant experience for the reviewer?
  - Reviewers will leave comments for things they like in addition to change requests, worded in a way that invites the author to continue the conversation if it's not a correction of something that's objectively wrong (e.g., "Consider…" or "What do you think?")
  - Reviewers will explain the "why" of their feedback.
  - If you see a pattern of issues (e.g., the wrong logo or using the wrong word) throughout the course, just comment on it once, and it's the ID's responsibility to catch all the instances. Make sure to call out the pattern in the comment. For example, "Please make sure to fix all instances throughout the course."
- Authors
  - Respond with gratitude
  - Respond in the same method in which feedback was provided
  - If they agree with the comment, they will make changes if needed, and mark it "Resolved."
  - If they disagree with the comment, they will respond to it with questions, clarifications, and/or explanations worded in a way that invites the reviewer to continue the conversation (e.g., "What do you think?")
- Process
  - To: Laurie is required (If ID, then send to Sr. ID mentor first. Laurie reviews afterwards and sees your feedback)

    Note: Laurie can step in and do the first review if the Sr. ID is on PTO or has low bandwidth.
  - CC: Sr ID peers, ID IIs are copied as well
    - Peer review for mentees on other content comes later
- Bi-weekly Sr ID meetings
  - Current projects
  - Mentee updates and challenges
- Learning Gov includes all IDs
  - Helps them understand thought process and have a say in it

Lead/Sr ID Mentor Role

- First round of content review
  - Compliance with our governance, inclusive design checklist, and templates
- First round of design doc review (optional)
- 30-minute weekly check-in meetings
  - Discuss and ideate on content challenges
  - Provide feedback and guidance on content and process per mentee request and/or as needed

Email Requesting Feedback

- When requesting feedback from SMEs and/or stakeholders, include the following in the body of the email:
  - what the content needing review is
  - what kind of feedback you're looking for
  - how you would like to receive the feedback

- by when you need the feedback.
- The subject line should follow this format:
  - ACTION REQUESTED by EOD _______________: Review [insert name of course here]
- Example Template:

ACTION REQUESTED by EOD

- If the file sent for review is a Microsoft Office file (e.g., Excel file, PPT deck), include instructions for the SME to review in the Desktop app.

Example: ACTION REQUESTED by EOD

Saving Files

- Every time you start a new project, create a new folder for that project in the Project Files folder.
- All source files and resources used should be saved in this folder by the time the project has ended.
- Any files shared for review (e.g., Design Document) should be saved and linked from this folder.
- All images purchased from Getty should be saved in this Stock Library.

Annual Content Reviews

All courses should be reviewed by stakeholders at least once a year to maintain the relevancy and accuracy of our offerings. The process works as follows:

1. The Project Manager (PM) closes the project on the intake Smartsheet.
2. The project moves to the completed projects Smartsheet.
3. A workflow will email the PM team that a project has been closed and an alert needs to be created.
4. The PM team will create an alert on that line item that is one year from the closed date. This alert will email all IDs to account for any team changes that happen during that time.
5. Assigned ID emails the stakeholder with the Review Request:
   a. Check to see if stakeholder has access to the course in Showpad. If they do not have access to Showpad, submit a Showpad ticket to request access. If they do not have access to the course, add them to the course.
   b. Sample Email:

      Subject: Content Update Review Requested by 6/3: Field Requirements for Automated Client Summary

      Body:

      Hi, Natha,

      I can't believe a year has already passed since we launched the Altify Account Manager: Field Requirements for Automated Client Summary course to all existing users. When we launched the course, we had decided I should circle back with you in a year to see whether any updates were needed. This helps us keep the training relevant and current for team members and any new hires.

Will you please review the course and let me know what changes (if any) are needed? A response by 6/3 would be greatly appreciated, but this date is flexible if you need more time.

Thank you so much!

6. ID proceeds based on requested changes.
    - If the stakeholder requests that the course gets sunset, email Steven with the request to archive the course.
    - If the stakeholder requests minor updates, make the revisions and update the course in Showpad accordingly.
    - If extensive changes are needed, submit a new intake form to create an updated version.

7. Once content updates are done:
    a. ID lets PM know content review has been completed.
    b. If the stakeholder is not in sales, ID removes stakeholder access to Showpad. Submit a Showpad ticket to request their access be removed.

Onboarding Paths

- Path Naming Convention
    - Include the brand, the role(s) the path applies to, and the word "Onboarding."
    - Use the most used format for the brand (e.g., F&I vs. Finance and Insurance).
    - **Example:** Dealertrack F&I Onboarding for AMs and IRSMs
- Course Naming Convention
    - Begin the course title with the brand (most used format), followed by the week in brackets.
    - Avoid using colons.
    - **Example:** NGC [WEEK 2] Home Office Inventory and Systems and Tools Access
- Course Completion Instructions
    - Include the knowledge check question on what a completed course looks like in the "How do you get credit for this course?" section only in the first Rise course of the path.
- Mandatory resources to include:
    - Always incorporate the territory maps resource somehow in the Onboarding Path, so that new hires are made aware of the tool.
    - Always incorporate the Salesforce BU Referral Tool course somehow in the Onboarding Path, so that new hires know how to refer a client to a different sales team.
- Saving Files for the Onboarding Path
  Note: All files for the Onboarding Revamp 2021 project are saved in the relevant Focus Groups folder found here:
    - Existing Content: Save all files received for existing content in an "Existing Content" folder.
    - New Content: Save all source files (if applicable) for new content in a "New Content" folder.
    - Final SCORM Files and Documents (e.g., Job Aid PDFs): Save all final files for uploading or linking in Showpad in a "FINAL" folder located in the New Content folder.
- Sharing Documents with Learners in Showpad:
    - We will not be uploading any non-SCORM files (e.g., PDFs, PowerPoints, Excel spreadsheets) into Showpad. Instead, link to the file in SharePoint, so that in the event updates to the file are needed, the ID can just update the file on SharePoint and not have to go into Showpad to update. When providing the link for access to a document in the folder, ensure that you select, "People in Cox Automotive with the link can edit."
- Manager-led Courses
    - Include the following instructions:

- Your manager will be scheduling time for you to go over this topic with them or another expert.

  If you don’t see a scheduled activity on your calendar, go to your manager and ask who will teach you this topic.