

Instructional Design

Project Documentation

Featured Auto Repair Center

Project Description

Provide a short description of the project. What problem(s) are we trying to solve? What are the desired learning outcomes of the training?

Featured Auto Repair Center (FARC) is a KBB feature sold by S&R sales team. This project is to design a program for new hires to learn about the product, how to use the tool, and how to strategically pitch the tool to clients. Currently there is no onboarding program for new hires, and they have been running bootcamp style calls to fill the gap. By the end of the learning path, learners will be able to prospect conversations, strategize a pitch based on client needs and goals, and retain business after sale with a performance review.

Project Scope

The Project Scope section should be completed during or after the initial kickoff meeting.

Project Resources

Identify the project team and resources. Add/remove roles as needed.

ROLE	NAME(S)
Project Manager	Raven Mackey
Sr Instructional Designer	Erica Zimmer
Reporting	Steven Poyner
Stakeholder(s)	Chad Johnson, Michael Pettigrew
Subject Matter Expert(s)	Chad Johnson, Michael Pettigrew, Jade Terreberry, Juan Flores, Tina Saghafi, Kevin LeSage, Valeria Valera, Renee Benton, Nakisha Mitchell

Targeted Learners

List the learners who will require this training.

- S&R FARC Sales team under Chad Johnson, existing and new hires
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Desired Business Outcomes

What are the desired business outcomes of the training? What needle(s) is/are we trying to move (KPIs)?

The S&R team needs to do a deep dive into industry knowledge around fixed ops, and deep dive into the S&R product to improve their ability to sell this product.

High-Level Training Plan

What is the outline of the training plan? What does the training look like? Is it the same for different roles?

Showpad Learning Path assigned to new hire by _____

1. Course 1 – KBB FARC: Demo Live Site: SME Juan Flores
 - a. Watch Juan Navigate KBB site and schedule a sample service
 - b. Downloadable transcript, if possible
2. Course 2 -KBB FARC: Demo with Deck: SME Chad Johnson
 - a. Watch Chad demo use the pitch deck to present to a client
 - b. Downloadable transcript, if possible
3. Course 3 - Navigate Power BI Demo with Jade T.
 - a. Watch Jade navigate Power BI to find specific performance data (impressions, appointments scheduled, RO Dollars generated, lead performance)
 - b. Downloadable transcript, if possible
4. Course 4 - Articulating ROI Demo with Jade
 - a. Watch Jade walk participants through the value of Power BI data showing high performance and the ROI to the client pre- and post-sale.
 - b. Downloadable transcript, if possible
 - c. Activity – Articulating ROI pitch back
5. Course 5 - Articulating Opportunity Demo with Jade
 - a. Watch Jade demos how to communicate areas of opportunities based low performance data in Power BI
 - b. Activity – Articulating Opportunity pitch back
6. Course 6 - KBB FARC Sales Pitch Course with Chad
 - a. Watch KBB FARC: Intro pitch
 - i. Downloadable transcript, if possible
 - b. Watch KBB FARC: Value Prop Pitch
 - i. Downloadable transcript, if possible
 - c. Watch KBB FARC + Alpha: Value Prop Pitch
 - i. Downloadable transcript, if possible
 - d. Watch KBB FARC: Closing the Sale Pitch
 - i. Downloadable transcript, if possible
 - e. Watch KBB: FARC Overcoming Objections Pitch
 - i. Downloadable transcript, if possible
 - f. Watch KBB FARC: Wrap-up and close
 - i. Downloadable transcript, if possible
 - g. Activity -Pitch back
7. Activity- Review latest Enhancements and Product Updates (link to Sharepoint folder)

8. Activity - Review Sales Collateral in Seismic
9. Activity - Watch Interview of Jade and Juan
 - a. Downloadable transcript, if possible
10. Activity – Listen to Auto Sales in the Information Age Podcast
 - a. Downloadable transcript, if possible
11. Activity - Read Amazon Whitepaper and Google News
12. Course 7 – Sales Process and Conversation Strategy with Jade (TBD)
 - a. Watch video
 - b. Downloadable transcript, if possible
13. Course 8– Competitive Intel with Michael or Dave video
 - a. Watch video
 - b. Downloadable transcript, if possible
 - c. Activity – review the sites
14. Course 9 – Xtime ID Mapping video (already created? SME Renee Bunton)
 - a. Activity - Record themselves showing they know how to do this
15. TBD – Business Rules and Pricing.
16. Course 10 - Performance Management recording with Michael
 - a. Watch performance management video with Michael
 - b. Downloadable transcript, if possible
17. Course 11 - Resources and Business Partners with Michael or Nakisha Michell
 - a. Video walk through the onboarding/support process
 - b. Downloadable transcript, if possible
 - c. Troubleshooting FAQ Doc

Types of Deliverables

Identify the types of deliverables requested. Include a brief description of each type included. Remove any from the table that will not be used.

METHOD	DESCRIPTION
eLearning	A Showpad Learning Path with Following Deliverables:
Quick Reference Guide/Job aid	1. Overcoming Objections 2. Resources and Business Partners 3. Troubleshooting FAQ
Video	4. KBB FARC Demo (Chad) 5. Demo with Deck (Chad) 6. Navigate PowerBI (Jade) 7. Articulating ROI Demo (Jade) 8. Articulating Opportunity (Jade) 9. Sales Pitch: Intro (Chad) 10. Sales Pitch: Value Prop (Chad) 11. Sales Pitch: Alpha Value Prop (Chad) 12. Sales Pitch: Overcoming Objections (Chad) 13. Sales Pitch: Close the Sale (Chad)

	14. Sales Pitch: Wrap-up and Close (Chad) 15. Business Rules and Pricing (?) 16. Performance Management (Michael) 17. Resources and Business Partners (Michael or Nakisha) 18. Competitive Intel (Michael) 19. Sales Process and Conversation Strategy (Jade ?) 20. Interview of Jade and Juan (completed) 21. XTime ID mapping (completed)
PodcastMETHOD	22. Auto Sales in the Information Age (completed)
Articles/Readings	23. Amazon White paper “Cox Automotive scales digital personalization using an identity graph powered by Amazon Neptune” (completed) 24. WSJ Article – “Google to Stop Selling Ads Based on Your Specific Web Browsing” (completed)
Learner Activities	25. Sales Pitch Back 26. XTime Mapping Video to demonstrate they can do it 27. Navigating Power BI video to show they can navigate it 28. Articulating ROI and Opportunity TBD 29. Live Site Demo TBD 30. Review Product Updates TBD 31. Review Collateral in Seismic TBD 32. Performance Management TBD 33. Podcast TBD 34. Business Rules and Pricing TBD

Detailed Training Timeline

Create a detailed timeline of learning events related to this training. Add/remove rows as needed.

DATE	ACTIVITY
4/12/21	Showpad Learning Path assigned to new hire

Project Meeting(s)

List dates for project meetings.

[2-24-21] – FARC Kickoff
[3/5/21] – Meeting with Dave, Ed, Erica, Diane
[3/10/21] – Meeting with Michael P, Erica, Diane, Raven, Laurie
[3/11/21] – continued meeting with Michael P
[3/16/21] – Laurie & Erica Design Doc Review
[3/17/21] – SME design Doc Review with Chad, Michael, Dave and Ed
[date] – Meet with Steven re: Showpad set-up and reporting
[date] – SME Meeting with Chad
[date] – SME Meeting with Juan
[date] – SME Meeting with Jade
[date] – SME Meeting with Michael
[date] – SME Meeting with Nakisha
[date] – Content/peer review Erica and Diane
[date] – Content review(s) with Laurie*
[date] – Content Review with Michael and Chad

Project Design

Featured Auto Repair Center

Challenger

How is Challenger being incorporated into the training? What Challenger messages will be utilized?

How to identify the mobilizer refresher training

How to use commercial insights to pitch the data to clients and to help overcome objections.

Learning Objectives & Outlines

List the learning objective(s). Ideally, these should be observable and measurable and include the following (ABCD):

- *Audience: Who*
- *Behavior: What*
- *Condition: Under what condition(s)*
- *Degree: To what degree (e.g., frequency, quality, or proficiency of behavior)*

Create a detailed content outline for each corresponding deliverable.

ELEARNING PATH

Learning Objectives:

- Given the S&R Team member has access to Showpad Learning path, FARC Product tools, and pitch deck, the S&R team member will be able to provide more strategic pitches, target the right contacts, handle objections to close sales more frequently, and retain business after sale through performance reviews.

Content Outline:

- See High-Level Training Plan Above, and the following details below

QUICK REERENCE GUIDE/JOB AID

Learning Objectives:

- TBD

Content Outline:

- Troubleshooting FAQ

QUICK REERENCE GUIDE/JOB AID

Learning Objectives:

- TBD

Content Outline:

- Business Partners Contacts
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PODCAST – Auto Sales in the Information Age with Juan Flores and Jade Terreberry

Learning Objectives:

- TBD

Content Outline:

Learners will listen to [this podcast](#)

Activity:

VIDEO – KBB FARC Demo Live Site

Learning Objectives:

At the completion of the course, learners will be able to:

- Navigate the product on the KBB site
- Recall
- Repair
- Maintenance
- Schedule a sample service, showing how it feeds into the CRM and how the consumer receives a confirmation

Content Outline:

- Chad will walk participants through the steps of scheduling a sample service on FARC site

Activity:

VIDEO – KBB FARC Video Demo with Deck

Learning Objectives:

At the completion of the course, learners will be able to:

- Present the product to a client using the deck provided by Marketing
- Explain the features and benefits of the product
- Present the pricing options for the product.

Content Outline:

- Chad will walk learners through the [deck provided by marketing](#) and explain the benefits, features, and pricing options for the product

Activity:

VIDEO – Power BI Demo

Learning Objectives:

At the completion of the course, learners will be able to:

- Navigate Power BI to find specific performance data (impressions, appointments scheduled, RO dollars generated, lead performance)

Content Outline:

- Jade will demonstrate how to navigate Power BI to find impressions, appointments, scheduled, RO dollars generated, lead performance.

Activity:

VIDEO – Articulating Opportunity with PowerBI data

Learning Objectives:

At the completion of the course, learners will be able to:

- Communicate areas of opportunity, based on Power BI data showing low performance.

Content Outline:

- Jade will demonstrate how to identify areas of opportunity based on low performance

Activity:

VIDEO – Articulating ROI with PowerBI Data

Learning Objectives:

At the completion of the course, learners will be able to:

- Communicate the value of Power BI data showing high performance and the ROI to the client pre-sale and post-sale.

Content Outline:

- Jade will demonstrate how to use high performance data in Power BI to show ROI to the client pre-sale and post-sale.

Activity:

VIDEOS (6 Videos)– Sales Pitch

Learning Objectives:

At the completion of the course, learners will be able to:

- Pitch the product to the client, through an introduction, articulation of the value proposition (with and without Alpha), and closing.
- Overcome objections.

Content Outline:

Chad will demonstrate the complete cycle of the FARC Sales Pitch:

1. Intro
2. Value Prop
3. Alpha Value Prop
4. Overcoming objections
5. Closing the Sale
6. Wrap up and close

Activity:

Pitch Back – Learner will do a pitch back that demonstrates each component of the sales pitch

VIDEO – Performance Management

Learning Objectives:

At the completion of the course, learners will be able to:

- Conduct a monthly business review.
- Identify churn risk.
- Articulate value to address client concerns.
- Prevent client churn.

Content Outline:

- Michael will demonstrate how to conduct monthly business reviews to identify churn risk, address client concerns and articulate value and to prevent client churn.

Activity:

VIDEO – Resources and Business Partners

Learning Objectives:

At the completion of the course, learners will be able to:

- Explain the implementation/onboarding process.
- Explain the client support process.
- Identify what to do and where to go for troubleshooting and customer issues.

Content Outline:

- Michael or Nakisha will walk learners through the implementation/onboarding as well as the client support process
- **Resources:**
 - o [S&R Cross Dept - Client Onboarding Flow - Feb 2021 Update.pdf](#)
 - o [S&R Q&A.docx](#)

Activity:

VIDEO – Competitive Intel

Learning Objectives:

At the completion of the course, learners will be able to:

- Identify the product's main competitors and product differentiators.

Content Outline:

- Michael will walk learners through the product's main competitors and what the product differences are.

Activity:

Learners will review the sites (and do what?)

VIDEO – Interview of Jade and Juan

Learning Objectives:

- TBD

Content Outline:

- Participants will watch [this video](#) (is this the best link?)

Activity:

VIDEO – Xtime ID Mapping

Learning Objectives:

At the completion of the course, learners will be able to:

- Validate that SVOC IDs between Media and Xtime are aligned working with Client Data Ops.

Content Outline:

Learners will watch [this video](#) on how to ID map between Media and XTime.

Activity:

Record themselves doing ID mapping for manager to review

VIDEO – Sales Process and Conversation Strategy

Learning Objectives:

At the completion of the course, learners will be able to:

- TBD

Content Outline:

Participants will watch a video of Jade explaining the business process and conversation strategy

Resources: [Jade Email](#)

Activity:

ACTIVITY – Review Product Updates

Learning Objectives:

- Learners will be able to know where to find product enhancements and updates

Content Outline:

- Learners will review the latest enhancements and product updates in [Sharepoint Folder](#) (and do what?)

Activity:**ACTIVITY – Review Sales Collateral in Seismic****Learning Objectives:**

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Content Outline:

- Learners will review the [sales collateral in seismic](#) (and do what?)

Activity**ACTIVITY – Read****Learning Objectives:**

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Content Outline:

- Learners will Read the [WSJ Article](#) and [AWS article](#) (and do what)

Activity

Sales Leader Involvement Plan

What will be the level of involvement of sales leaders in the training? What will their involvement entail? (Sales Leader Effectiveness Team will collaborate on and confirm plan.)

Level 1: Awareness of training

Level 2: Engagement with the learning

Level 3: Training/reinforcing the learning

Level 4: Coaching to on the job performance over time

LEVEL(S) OF INVOLVEMENT	DESCRIPTION OF SALES LEADER INVOLVEMENT	SALES LEADER EFFECTIVENESS (SLE) TEAM MEMBER CONSULTED	DATE OF CONTACT WITH SLE TEAM MEMBER
Level 1, Level 3, Level 4	They will be notified when a sales team member enrolls in the course so they can help reinforce the learning through coaching where necessary.	Renee	

Communication Plan

Describe how the audience will become informed about the training program. Describe how you will communicate with the audience on an ongoing basis as it relates to changes, updates, etc.

At this time, since there is 1 new hire that is anticipated to take the training, the manager will direct the new hire (or anyone who is flagged as needed retraining) to take the course.

Deployment Plan

How will the created materials be provided to the participants?

Learning Path will be assigned to new hires as part of the onboarding process starting _____

Reinforcement Plan

How will you reinforce the learning and when (30, 60, and/or 90 days past deployment)? What content will be created to boost recall and help ensure permanent behavior change (short quizzes, surveys, etc.)?

Managers will check progress in Showpad and debrief with team members to target area for learning opportunity and coach as needed.

Measuring Success

How will you measure success? How do these measurements map back to your learning objectives and desired business outcomes?

Steven will generate a survey to be distributed at the end of the product training, and update the master reporting spreadsheet (Level 1)

Steven will generate reporting for the pitchback and demoback completions and scores, and update the master reporting spreadsheet (Level 2)

(Is there a way to know the number of FARC that has been sold and compare results? (level 3&4))

Evaluation Plan

Outline how the effectiveness of the training will be measured. Add/remove rows as needed.

LEVEL	DESCRIPTION	PLAN
Completion	Did the learner complete the training?	Reports will be run to measure completions of the Showpad learning path.
Satisfaction	How did the learner feel about the learning experience?	An MTM Survey at end of learning path
Knowledge	Is the learner able to correctly answer questions about the content?	Reports will be run to measure knowledge check results.
Application	Can the learn apply what they've	Reports will be run to measure grades of submitted pitches and demos via Showpad.

	learned through a scenario, pitch, or demonstration?	
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Reporting

What reporting will be provided after training is completed? Who will receive the reports and how often?

Steven Poyner will populate data in master reporting spreadsheet and Laurie and Erica will reference course completions and scores in _____

New Hire Training

Does this content need to be integrated into onboarding training? If so, when does it make the most sense for new hires to complete the learning (ideally, as close as possible to the point at which they're using it on the job)?

This is an onboarding course for S&R FARC. New hires need to complete this course within X days of being hired.

Content Updates

When does it make sense to revisit the content and update it? Who will be the points of contact for collaborating on content updates? (Sr Instructional Designer schedules time on her personal Outlook calendar for content updates.)

Erica will consult with Chad on a yearly basis to check in about updates.

Project Design Approval

Approvals

*The following internal and external team members approve the **Project Design**. Add/remove rows as needed.*

ROLE	NAME	DATE APPROVED
Manager, Learning Operations	Laurie Strauss	3/16/21
Stakeholder(s)	Chad Johnson, Michael Pettigrew	[Date]
SME(s)	Chad Johnson, Michael Pettigrew, Jade Terreberry, Juan Flores, Tina Saghafi, Kevin LeSage, Valeria Valera, Renee Benton	[Date]