

Erica Zimmer

2022 Progress Checks - CAI 4/15/22

Date 4/15/22

Discussed with Laurie Strauss

Review Period 2022

Employment Details

Position	Job	Sr Instructional Designer
Location CAUTO_CAVTREM001	Department	SBO - Training & Readiness-CAUTO/CACORPX527
	Manager	Laurie Strauss

Questionnaire for Erica Zimmer

How are you progressing on your priorities?

I've continued to improve my visual design courses by taking the following courses on LinkedIn learning: Graphic Design Foundations Layout and Composition I am continuing to slow down and proofread my work and emails before I submit. I have worked on the following projects: CAM Phase 2 Webinars NADA Sales Call Prep Webinar NADA Notes Tool support Cocktail Smart eLearning course S&R Fixed Ops eLearning course Fleet Segmentation eLearning course Contributions to Learning Ops: I continue to meet with Laurie and Diane on regular basis to draft design governance. I created the Job Aid template based on our design governance. Met with vendors to find an efficient solution for closed captioning and transcripts for our videos and audio and presented proposal to leadership. ST&E Contributions: I continue to lead the Culture Club I lead the first Book Club I collaborated with Sara and Laurie to design an engaging Culture Statement Exercise at the In-Person Summit.

What will you be focused on moving forward?

I will continue to lead the Culture Club. I will continue to lead the book club. I will continue to work on S&R Fixed Ops eLearning. I will continue to work on Fleet Segmentation eLearning. I will continue to work on CAM training. I help the new IDs learn our process and provide support where needed. I will continue to ask for and provide feedback on courses we design. I will continue to participate in Learning Governance sessions. I will continue to work with Laurie, Sara and Jen to make a plan for giving and receiving feedback training in ST&E.

Where do you have opportunities to learn and grow?

I will continue to work on my visual design. I will learn to be a mentor and provide support to a new ID and be first line of feedback to that ID. I will continue to evolve my leadership skills with the Culture Club to help make our

team more inclusive, fun, and welcoming. I will continue to work on being more comfortable doing project intakes.

What support do you need?

I will continue to ask for feedback from my manager and peers. I will continue to ask for help with prioritization and bringing up any general concerns about projects with my manager. I will ask for guidance to best understand my role as a mentor from my manager when needed.

Questionnaire for Laurie Strauss

How is the employee progressing on their priorities?

Erica continued to demonstrate growth as an instructional designer, executing on multiple projects in Q1: -Cox Automotive Mobility Sales training: Erica continued to partner effectively with SMEs to get the content she needed to complete the vILT webinars for Phase 2. She presented herself as a confident and competent consultant and designer from discovery through design and training run-throughs and earned high praise from her team members and project partners. -Retail Solutions Challenger Message course: Erica partnered with folks across STE to create an engaging course repurposing existing video and repackaging new video to enable all sales teams to give elevator pitches on our digital retail solutions. -NADA Prep Call: Erica partnered with folks to create a PPT deck for various presenters. -NADA Notes Tool training: Erica collaborated with her ID team to create a job aid/QRG and collaborated with a consultant, providing feedback on his content. -KBB Service & Repair/Fixed Ops course: She collaborated with folks across STE to package a webinar in a course and load it into Showpad. Erica was recognized with an SBO Spotlight award for her work and contributions to the NADA sales training projects. She continues to show progress in her proofreading skills, producing clear and correct writing, in her content and communications. She has also shown growth in her visual design skills, creating airy, compelling, and inclusive designs. She has demonstrate becoming more proficient and capable in performing admin tasks in Showpad. Professional Development Progress: -She completed the Graphic Design Foundations course on LinkedIn Learning and shared with me what she learned and how she'll use it. -She completed the Layout and Composition visual design course on LinkedIn Learning and shared with me what she learned and how she'll use it. Learning Operations Team Contributions: -She continued to work with her peer and I to discuss, determine, and document learning design governance, from which she created a job aid template and weighed in on Diane's Storyline template for chunking instructional videos and adding corresponding knowledge checks. -She led a training for the Contractor IDs on the Inclusive Design Checklist. -She researched and met with vendors to submit a recommendation for a transcription service to create efficiencies in making our video content more accessible and inclusive. -She promoted the new ID roles on LinkedIn and acted as a resource and referral for qualified candidates. -She collaborated on defining the process for

mentoring the new IDs, inclusive of providing feedback on content and guidance on our processes and related documents. -She made time to meet with Nicole and I in person to strengthen our relationships and boost morale. -She sent personalized postcards to her teammates from her travels. STE Contributions: - Erica became the sole leader of the STE Culture Club, inclusive of planning meetings with team-building icebreakers and strategic discussions around initiatives to improve the broader STE culture. More specifically, she played a critical role in the creation of our STE Team Culture Statement and the in-person training on it, as well as in the design of our Psychological Safety training. -She led the STE Book Club, inclusive of a retrospective wherein we created a proposal for next steps, and she communicated with Nikki for feedback. She also collaborated to create and promote a survey for the next book selection, and communicated with Nikki for approval to expense the book to promote an inclusive club.

What should the employee be focused on moving forward?

She will complete the KBB S&R training project, including ensuring Mark is clear on her process and has access to her content. She will complete the Fleet Segmentation training project. She will continue to engage in regular content reviews and feedback with her peer and mentee, focusing on delivering and receiving safe feedback to ensure more cohesive learning experiences. She will teach Liz about our design governance and process documents and initiate her weekly mentor/mentee meetings to start officially mentoring Liz. She will continue to collaborate with me and her Sr ID peer on creating learning design governance and standards for our team. She will continue to send submissions for her work to her peer for the monthly Sales Learning Catalog updates. She will continue to lead the STE Culture Club, guiding discussions, ensuring work is completed, that everyone has a voice, and our efforts are well promoted. She will collaborate with Sara, Jennifer, and I in planning the Feedback training. She will continue to lead the STE Book Club. She will continue to work towards achieving the goals in her IDP.

Where does the employee have opportunities to learn and grow?

Erica has self-identified areas of opportunity on her IDP: visual design among them. She has also opportunity to become more proficient in leading project intake meetings. Erica will need to focus on finding a productive balance between being an effective learning consultant, designer, and mentor in Q2.

Where can you provide additional support?

I will continue to encourage her to take time for professional development opportunities, especially those tied to her IDP. I will continue to provide feedback on her work, especially on visual design, in content reviews and on her overall performance and progress toward her goals in our weekly 1:1s. I will provide guidance as needed on project prioritization. I will provide guidance as needed as she starts mentoring Liz. I will attend any project intake meetings she is leading to

provide support until she feels comfortable leading them independently. I will continue to encourage her to reach out and/or schedule time with me for feedback, clarification, and/or support as needed.

Moving forward the employee should:

Continue

Please provide additional information. (Optional)

Erica continues to use her incredible empathy to effectively partner and build relationships with her teammates and project partners. She also leverages this to create engaging, accessible, and inclusive learning experiences for our sales teams. In addition to seeing her grow as a consultant and designer, I've seen growth in Erica's ability to balance the needs of learners with the needs of the business, remaining flexible and learner-focused, to offer viable solutions to meet the moment. Her confidence has grown significantly, evident in her interactions, communications, and body of work.