

Job Aid Makeover: Design Documentation

IT6710: Creative Designs for Instructional Materials

Greg Lea

Overview

The original job aid is used within a training course for call center agents whose job is to take phone calls from customers in jeopardy of losing their homes to foreclosure. The job aid addresses loan workout options. These are alternatives to foreclosure in which the company helps the customer catch up on missed payments, continue future payments, and, ultimately, stay in his or her home. The agents discuss the options with the customer, help the customer select the best option, and guide the customer through the application process.

The selected job aid is 12 pages of text that describes the workouts that are available for one type of loan. The information includes the result of the workout and key requirements to qualify for each workout. The audience is expected to quickly recall all of this information while speaking to often difficult customers on the telephone and simultaneously manipulating multiple software applications. The job aid will help agents recall needed information and process calls efficiently by following a hierarchy. I have reformatted the job aid as a dense content display that presents the workouts in a way that is easy to read and remember.

Audience

This job aid is part of a class that is large and includes many types of people. Thus, all personality types will likely be represented and must be accommodated if possible. The job aid is a mechanism for appealing to multiple personality types. In the classroom workouts are presented during a lecture that includes cognitive activities that help participants define each workout. This job aid will reinforce this instruction with a visual representation of the workouts including a comparison of similar workouts. It will be distributed as a handout that can be referenced later in the “live” environment. Presenting the same material using different methods and formats will appeal to as many audience members as possible (Abela, 2008, p. 21).

Learning Objectives

Our visual system is our most powerful way of interpreting the world around us (Roam, 2008, p. 31).

The job aid will help users to:

- Explain workouts to the customer
- Explain the differences between similar workouts
- Select the workout that best benefits the customer and the company

The visualization of this information will help to paint a picture in an agent’s mind of the hierarchy. Agents will be better able to recall the information and will have an easily accessible handout for quick reference.

Job Aid Makeover: Design Documentation

IT6710: Creative Designs for Instructional Materials

Greg Lea

Problem/Solution

The job aid is text heavy and does not offer any of the material graphically. Additionally, the text is lengthy and does not serve the job aid format well. A job aid should be clear and concise and easy to read and comprehend. The text format makes this difficult.

Workouts should be considered according to a hierarchy, but the options are not presented as such. Workout descriptions should be sequenced according to the hierarchy.

Some of the workouts are similar in name and purpose. The job aid does not compare and contrast similar workouts or offer any explanation of why one should be considered versus another. This lack of information combined with the absence of a visual hierarchy makes it difficult to remember which options should be considered in which sequence.

Evidence

The content presented was vetted for accuracy by subject matter experts within my organization. I did not create the sequence or definition of the workouts within the hierarchy. These are well known specimen in the mortgage industry. My role was to rewrite the definitions for simplicity and clarity and to convert their presentation from a text-based to a visual format. See *Worksheet A6: List of Evidence* in the appendix for a list of the content included in the presentation.

Anecdotes

I wanted to convey the purpose of the job aid by telling a story that the user could relate to. To accomplish this, I added a cover page that to better convey the job aid's purpose. The cover page tells the story of the agent and her struggle to make sense of the featured workouts. It provides context to the user, creating a scenario that is familiar to any agent.

Format

The workout hierarchy paints an easy to remember picture in the user's mind and is presented as a dense content display. The data is presented graphically to aid retention and understanding (Medina, 2008, p. 239). However, the dense content display only told part of the story because it, in fact, failed to tell any story at all. After some reflection and with the help of the Abela worksheets, I decided to add a cover page inspired by the comic book format that helps to more clearly define the problem and solution.

Sequencing

The job aid tells a story that follows the S.Co.R.E. model presented in the Abela (2008, pp. 75-79) text.

Job Aid Makeover: Design Documentation

IT6710: Creative Designs for Instructional Materials

Greg Lea

	S.Co.R.E.	Description
1	Situation	Agent is frustrated and surrounded by workouts.
2	Conflict	The available options are a mess and unorganized.
3	Resolution	Graphic hierarchy organizes and defines the workouts. Compares and contrasts similar options for greater clarity.
4	Example	Agent on cover provides relatable context. Arrows lead to solution on page 2.

This story is effective an effective presentation device because it is relative to the target audience (Abela, 2008, p. 68). Additionally, it ensures that the audience understands the problem and, through the use of images, may help compel them to keep reading (Abela, 2008, p. 97; McCloud, 2006, p.8). It uses the hierarchy to fix a problem that most agents have experienced—too much unorganized data. I chose a graphical, layered structure for the hierarchy to help convey a sense of sequence (Duarte, 2008, p. 49).

Graphics

The designer must ensure that meaning is easy to interpret (Duarte, 2008, p. 93; McCloud, 2006, p.26; Abela, 2008, p. 110). One way of doing this is to convert text to graphics. People retain information more efficiently when it is presented graphically (Medina, 2008, p.239). In fact, text is far less efficient for transferring and retaining data than images (Medina, 2008, p. 234; Abela, 2008, p. 90). The most important piece of information that needs to be conveyed by the job aid is that workouts should be considered in a sequence. The first option in the sequence is the most favorable outcome for the customer and the company. The final option is the least favorable option. The third and fourth pages of the job aid compare similar workouts. Comparison enhances cognition, thus it is one of the most important principles of analytical design (Tufte, 2006, p.127; Abela, 2008, p. 98).

Text

It is important to add text to a graphical display to better explain its purpose (Tufte, 2006, p.131). The designer must be frugal, displaying only what is important and discarding anything that does not enhance the message (Reynolds, 2008; Medina, 2008, p. 210). I used as few words as possible to describe each workout, while still delivering the job aid’s message (Roam, 2008, p. 18). I limited this job aid to two fonts and italicized the “Keep Home” and “Liquidate” labels for emphasis in the hierarchy graphic as recommended by Duarte (2008, p. 143).

Job Aid Makeover: Design Documentation

IT6710: Creative Designs for Instructional Materials

Greg Lea

Layout

This is a single hierarchy that takes the agent through the eight options numbered in the orange boxes. Options 7 and 8 are set off slightly to distinguish them from the others. An agent will always start with option 1 unless the customer insists on liquidating the home, in which case the agent will begin with option 7.

I adhered to the basic graphic design principle of alignment by vertically and horizontally aligning each item on each page (Williams, 2008, pp. 33-50). I minimized the text and the images on each page, leaving plenty of whitespace, making the job aid easier to comprehend (Duarte, 2008, p. 106). I added the cover page to define the purpose and context of the job aid. The layout of the page uses comic book like framing, arrows, and the hierarchy itself to guide the reader from the frustrated agent to the solution and then to the instruction to turn the page to learn more (McCloud, 2006, pp. 32-33; Duarte p.96). The ordered layout of the orange boxes quickly conveys the purpose of the graphic which is also important for comprehension and retention (Abela, 2008, p. 108). On the third and fourth pages, I emphasized the workouts being compared by changing the color of the other workouts to gray, creating contrast and helping to quickly convey meaning (Tufte, 2006, p.131; Duarte, 2008, p. 93; Roam, 2008, pp. 36-37).

Measurement

The effectiveness of this job aid can be determined by tracking the number of approved and rejected workout applications, customer satisfaction, and department profits before and after its implementation. If customers are encouraged to apply for workouts that are most appropriate for their situation by agents that are able to explain the pros and cons of each option, application approvals, customer satisfaction, and profits should increase while application rejections decrease.

Peer Review Results

Prompting questions:

1. Does the transition from page 1 to pages 2 and 3 make sense? Pages 2 and 3 elaborate on page 1 and are not a continuation of it.
2. Is the distinction between items 1-6 and 7-8 on page 1 clear? The first 6 items are for people who wish to keep their home. Items 7 and 8 are the last resort for these people because they require the home to be sold.
3. Is the smaller text readable if printed?
4. Are the items in the blue boxes on pages 2 and 3 clear as to their meaning and purpose?
5. Are you able to decipher what the text under "Downpayment" on page 3 means?

Suggestions:

- Questions 1, 3 & 5: Reviews were supportive. I stuck with my original vision.

Job Aid Makeover: Design Documentation

IT6710: Creative Designs for Instructional Materials

Greg Lea

- Question 2: I received one suggestion to change the color of the final two workouts. I chose not to because I felt it might incorrectly convey the idea that these workouts were to be considered separately from the others. By numbering the workouts one through eight and coloring all of them orange, I want to be clear that this is a single hierarchy that is to be used in all situations.
- Question 4: I chose not to use a suggestion to clarify some of the abbreviations. Some of these are not actually abbreviations and the target audience is familiar with these terms. I received feedback that there were inconsistencies in the fonts in the blue boxes. These were corrected.

Job Aid Makeover: Design Documentation

IT6710: Creative Designs for Instructional Materials

Greg Lea

Resources

Abela, A. (2008). *Advanced presentations by design: Creating communication that drives action*. San Francisco, CA: Pfeiffer.

Duarte, N. (2008). *slide:ology: The art and science of creating great presentations*. Sebastopol, CA: O'Reilly Media, Inc.

Medina, J. (2008). *Brain rules: 12 principles for surviving and thriving at work, home, and school*. Seattle, WA: Pear Press.

McCloud, S. (2006). *Making comics: Storytelling secrets of comics, manga and graphic novels*. New York, NY: Harper.

Reynolds, G. (2008, March 28). Authors@google: Garr reynolds. Retrieved from <http://www.youtube.com/watch?v=DZ2vtQCESpk>

Roam, D. (2008). *The back of the napkin: Selling ideas and solving problems with pictures*. New York, NY: Penguin Group.

Tufte, E. R. (2006). *Beautiful evidence*. Cheshire, CT: Graphics Press LLC.

Williams, R. (2008). *The non-designer's design book*. Berkeley, CA: Peachpit Press.

Job Aid Makeover: Design Documentation

IT6710: Creative Designs for Instructional Materials

Greg Lea

Appendix

Worksheet A1a: Audience Personality Type

Audience	Personality Type
This job aid is part of a class that is delivered to newly hired agents in a call center. The classes are large and include many types of people. Thus, all personality types will likely be represented and must be accommodated.	Introvert, Extravert, Sensor, Intuitor, Thinker, Feeler, Judger, Perceiver

Worksheet A1b: Audience Personality Implications

Presentation Implications

- Provide all or part of presentation in advance (**not applicable to this job aid**)
- Plan for lots of discussion and Q&A
- Make sure to include all relevant facts and details in presentation or appendix
- Provide overview up-front (**not applicable to this job aid**)
- Identify principles, costs, and benefits (mostly benefits since this is more informational than persuasive)
- State implications for each person or group of stakeholders involved (How does this benefit the audience?)
- Present conclusions up-front (with intuitor overview) (**not applicable to this job aid**)
- List all alternatives considered (**not applicable to this job aid**)

Job Aid Makeover: Design Documentation

IT6710: Creative Designs for Instructional Materials

Greg Lea

Worksheet A2: From-To Think-Do Matrix

	<i>FROM</i>	<i>TO</i>
<i>THINK</i>	It is difficult to quickly determine which workout option I should discuss with the customer.	Start at the top of the hierarchy and work your way down to determine which workout is best.
<i>DO</i>	Suggesting a workout that is not the best option for the customer or the company?	Always choosing the best workout for the customer and the company.

Worksheet A3: Audience Problem

The problem that my audience has is:

Each workout option in the original job aid and complimentary training materials includes a description, customer profile, step by step application process, and a lengthy list of investors' qualifying guidelines. There is also a specific hierarchy that guides the sequence in which these options should be offered to the customer. Nowhere in the original training materials is this hierarchy presented. This is a small part of a five week new hire training course. Collectively, the course contains an overwhelming amount of information. As call center agents, my audience is expected to quickly recall all of this information while speaking to often difficult customers on the telephone and simultaneously manipulating multiple software applications on their desktop. My goal is to provide tools that will help these agents to recall needed information and process calls efficiently and in the order presented in the hierarchy. This job aid presents the hierarchy as an annotated image, making it easier to remember. Agents can follow the hierarchy to determine which workout to consider first, working their way down to the final option.

Job Aid Makeover: Design Documentation

IT6710: Creative Designs for Instructional Materials

Greg Lea

Worksheet A4: Spectrum of Solution Contributions

<i>Help recognize that there is a problem</i>	<i>Help define the problem</i>	<i>Help define the solution space</i>	<i>Solve part of the problem</i>	<i>Solve the whole problem</i>
-	-	-	Organizes the workouts into an easy to follow sequence. Presents the sequence visually to help retention.	-

Job Aid Makeover: Design Documentation

IT6710: Creative Designs for Instructional Materials

Greg Lea

Worksheet A5: Solution Evaluation

	Option 1 (Proposed Solution)	Option 2 (Alternative 1)	Option 3 (Alternative 2)
Evaluation Criteria	My revised job aid	Continue using the current job aid	Eliminate the job aid
Best workout selected for customer & company	Rejected applications decrease, successful workouts increase, profits increase	No change	Rejected applications increase, successful workouts decrease, profits decrease
Define repay plan vs. special fb for customer	Customer satisfaction improves	No change in customer satisfaction levels	Customer satisfaction declines
Explain types of Spec FB to customer	Customer satisfaction improves	No change in customer satisfaction levels	Customer satisfaction declines

Job Aid Makeover: Design Documentation

IT6710: Creative Designs for Instructional Materials

Greg Lea

Worksheet A6: List of Evidence

1. Arrange in hierarchy
2. Number
3. Separate “keep home” from “liquidate”
4. Highlight key characteristics of customer financials
5. Highlight key investor eligibility guidelines
6. Compare/contrast repayment plan to special forbearance
7. Compare/contrast HAMP and modification
8. Define two types special forbearance
9. Simple definition for each workout option
10. Highlight application time frames
11. Highlight results of options

Job Aid Makeover: Design Documentation

IT6710: Creative Designs for Instructional Materials

Greg Lea

Worksheet A7: Stakeholder Analysis

Whose help will we need for our recommendations to be implemented?	Call Center Management	Training program facilitator	
What must each of them think or do for our recommendations to be successful?	They must believe that we are presenting the workout option data correctly, but more clearly in a way that is easier to remember	They must believe that we are presenting the workout option data correctly, but more clearly in a way that is easier to remember. They must also believe that it will make teaching the class easier.	
Where do they stand on this?	Very supportive	Very supportive. Previously request a job aid for this topic.	
What do we need to close the gap?	Final approval of the new job aid, otherwise there is no gap	Will need to view and approve the new job aid in advance.	