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## The Blended Learning Approach



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With the rollout of its 24-hour help line to its local chapters, the Alzheimer's Association needed a quick and efficient method of training chapter staff and volunteers. As a result, the nonprofit implemented a blended learning solution that brings new customer service representatives up to speed quickly and consistently.

It is 1 a.m., and you are manning the Alzheimer's Association Contact Center's 24-hour help line. You press the button to pick up the next call. It is a young woman who is sitting in her car in her nightclothes calling from a cell phone. She is very upset and crying. She had gone to the convenience store, and when she got home, her elderly father didn't recognize her. He thought she was an intruder, grabbed her and put her in a headlock.

After a struggle, she managed to escape, went to her car, locked the doors and called the hotline. Her father is still inside the house, peering out the window at her. What do you say to this woman? How can you help her in this crisis situation?

Take a deep breath. This is a training simulation based on a real incident from the Alzheimer's Association Contact Center's blended learning program, which brings new customer service representatives from across the country up to speed quickly and consistently.

### **The Business Need**

In 2001, the Alzheimer's Association's national office, which is located in Chicago, created the contact center, a 24-hour help line to address Alzheimer's-related concerns, issues, support and research. By early

2003, the association was ready to provide this capability on a local level, to be delivered by the nonprofit's 77 local chapters nationwide.

As the contact center was rolled out to those local chapters, it became apparent that sending trainers from the national headquarters to train the local chapters was an expensive and unsatisfactory method for both the initial rollout and ongoing training. A faster and less expensive method was needed. The association selected Cedar Interactive to assess its needs, design the learning solution and develop the training.

The resulting program was a key component in the rollout of the contact center to the local chapters, and it permitted ongoing individual and small-group training of volunteers and staff personnel as needed at the local chapters and the headquarters.

"The training system helped us roll out the contact center to the chapters," said Beth Kallmyer, director of client service at the Alzheimer's Association. "It allowed us to take a great deal of training information and deliver it in an efficient and reliable way to staff throughout our 77 chapter networks. It continues to provide timely and consistent training, especially for new staff in the chapters."

At the project start, the Alzheimer's Association used the ADDIE development process: analyze, design, develop, implement and evaluate.

### **Analysis**

To conduct an analysis, Cedar Interactive interviewed stakeholders and target audience members, sat in on live phone calls and attended training sessions. The Alzheimer's Association

also provided feedback and guidance, ensuring all relevant factors were taken into account.

The analysis concluded that training at the Alzheimer's Association took a full day and consisted of sending three trainers to a chapter to perform the training two to three weeks before the phone system was installed. It was determined that this live training method was not satisfactory because it involved excessive travel costs, logistics and planning, and most of the training was forgotten in the intervening time between the training and the system installation.

### **Design**

Based on the analysis, it was determined that the ideal program would meet the following requirements:

- Be deliverable in either large groups for rollout purposes or individually to accommodate ongoing turnover of chapter staff and volunteers.
- Be deliverable by local chapter personnel who are not skilled trainers.
- Largely be self-instructional to minimize staff time requirements.
- Be suitable for users who may not have sophisticated computer skills.
- Have two versions, one for the national staff and one for the local chapters.

To meet these requirements, the program was developed in modular fashion, and since all the contact center chapters would have broadband access, it also recommended that the computer-based training be delivered online rather than by CD-ROM. Chapter staff would manage the instruction, but the main body of content would be delivered over the Internet and through self-instructional workbooks.

Since the skills to be taught included using the computer and phone procedures simultaneously, it also was recommended that a scenario-based, cognitive learning approach called performance-centered learning be used. This would most effectively prepare learners to follow correct procedures while they spoke on the phone and used the computer to document calls and utilize online job aids.

The job of the customer service representative is a complex one since they need to juggle several software programs while talking on the phone to callers who often are anxious or distressed and follow the right phone-handling procedures. Calls must be routed appropriately and entered into the call-reporting system. Such complex jobs are best taught with a "learn by doing" approach, in which the trainee learns and practices the skills in an integrated manner as the various skills are used on the job, rather than with static presentation of each skill.

The design recommendations included a high-tech/high-touch blended solution, in which each delivery method was chosen for its strengths.

This approach allows the different training delivery methods to be used to their best and most cost-effective purposes:

- Facilitator-guided modules to start, check in and end/evaluate the training session.
- Computer simulations for interpersonal and phone skills.
- Print-based workbooks to allow convenient, cost-effective knowledge transfer and problem-solving exercises.
- Guided exercises with live software systems (e.g., a scavenger hunt to help learners explore the internal knowledge management system).

Using self-study guides instead of online training for some of the modules not only saved money, but it provided instructional and efficiency benefits. These benefits included letting learners take the print-based modules at home to avoid tying up valuable computer time and allow for easier revisions during the beta testing process. In addition, it reserved the use of the interactive computer resources for practice activities, for which the computer is well-suited.

This high-tech/high-touch approach, in which a real human introduced the trainee to the Web-based training, helped people who were not used to computers or the Internet feel comfortable with the training process.

### **Development**

Development began simultaneously on all three

learning methods: live, facilitator-led, printed self-study guides and interactive Web online. This development included traditional instructional design activities such as developing learning objectives, interviewing subject matter experts, planning scenario and screen flow and developing content. In addition, a photo shoot was held on-site at the contact center, and audio was recorded using voices of contact center personnel. The online modules were programmed in Flash, and printed materials were produced for the leader and user guides. The entire program was then beta tested with a small group, revised and readied for final implementation.

### **Implementation**

The program was implemented by holding an initial train-the-trainer class, in which a dozen representatives from the chapters that were closest to implementing the contact center were trained. Following this session, those chapter personnel trained people at their respective chapters. This process continued as new chapters partnered with the contact center until all the chapters received the initial training.

This same program, which takes very little additional support, has been used to train new staff and volunteers individually and in small groups.

### **Evaluation**

Evaluation has occurred regularly since the program was initiated. It is now connected to the LMS to ensure usage is tabulated, and more than 1,500 courses have been delivered to date. As the contact center's procedures and technology have changed, the program has been updated to accommodate these changes. In addition to assisting the association in efficiently rolling out the contact center to the chapters, the learning system has greatly helped the association address ongoing training needs related to staff turnover.

The ability to bring new people up to speed quickly and consistently has been a major benefit of the system. The program provides a tangible way to practice call handling and decision making with hands-on activities that use the simulated phone system. This results in

higher-quality service to caregivers and persons with Alzheimer's disease.

Perhaps the best evaluation comes from callers to the contact center who provided the following feedback in a recent contact center survey of callers:

- "I can't rave about this organization enough! The 800-number and local chapter have been a godsend – keep up the good work!"
- "Professional, compassionate, helpful suggestions provided and prompt materials mailed to me. I have already referred another family and would definitely call again. Thank you!"
- "The helpline has been wonderful!"

### **Conclusion**

This training program successfully addressed ongoing training needs and was instrumental in permitting the contact center to roll out smoothly to all the chapters without training becoming an issue or limiting factor. In this way, the blended learning program has been a significant factor in the contact center's success and has permitted not only a smooth rollout but also faster, more efficient training of individuals and small groups at the local chapter level.

The training program has been in use for more than four years. It has been linked to an LMS for recordkeeping purposes and continues to provide top-level, scenario-based training. Not only has the training program helped enable the success of the business unit, but it has assisted the association in achieving its mission of improving the lives of individuals with Alzheimer's disease.

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