CONSULTING INC. BRIGHT IDEAS IN TECHNICAL & BUSINESS COMMUNICATIONS

MEDICARE SALES SUPPORT TRAINING

BACKGROUND

The client requested an update to their current training to help improve and support their learner's retention and to lessen staff turnover issues, in addition to providing a more consistent learning experience for the various contractors/employees that are hired and trained throughout the year. The client also wanted to have the flexibility to train in-person at multiple locations and/or remotely as needed.

The current three-week training includes one week of company culture, Medicare, and products training, followed by two weeks of systems training, hands-on, and certifications. Our team had five weeks to improve the current training, so we focused on the week one training content. The goal was to improve the current training, make it more engaging, and give it a refresh and consistency.

AUDIENCE

Learners are adults ranging in age from 21 to 65 who work in a call center environment. Common characteristics of current learners include:

- Various cultural backgrounds and education
- Some computer skills
- Enjoy working in a call center environment

SOLUTION

After our team conducted a needs analysis and reviewed existing content, our focus was on week one training and creation of a systems cheat sheet that would be used as a support resource for the following weeks. Because the content in week one was complicated and content heavy, our goal was to make the training more interactive and fun by utilizing the Learn, See, Do, Prove, Support it framework.

The final week one course included the following activities to help educate the call center representative about the company culture, Medicare, products, and systems:

- Participant guide
- Daily reflection
- Recorded calls and scripting activities
- Daily Kahoot question activities
- Journey maps
- Role play
- eLearning activities in Articulate Rise
- BINGO card tied to Prove it activities (final rewards given by client)
- Systems Cheat Sheet (proprietary systems sample not included)



SAMPLE | SCREENSHOTS | FROM TRAINING

The following table of contents image is from the participant guide. This is not a complete listing of all the content or activities that were included in the training.

Table of Contents

Welcome

Learning Path Overview

Overview and Purpose

What to Expect

Logistics

Requirements

Technical Support

Week 1: Day 1

What You Need to Know

Activity: Prove It! BINGO

Activity: Culture Connection

Activity: Daily Reflection and Action Planning

Week 1: Day 2

What You Need to Know

Activity: Parts are Parts! Round Robin Q&A

Activity: Meet an Agent: June

Activity: An Apple for the Teacher

Activity: Daily Reflection and Action Planning

Week 1: Day 3

What You Need to Know

Activity: A Member Journey

Activity: Exploring Medicare.gov - Medicare Parts A & B

Activity: Effective Listening = Your Role

Activity: Listen to Me (Parts 1 and 2)

Activity: Daily Reflection and Action Planning

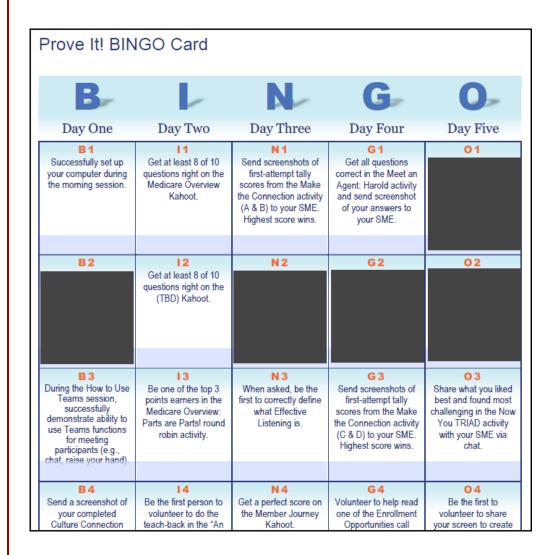
Week 1: Day 4

What You Need to Know



SAMPLE OF BINGO BOARD ACTIVITY

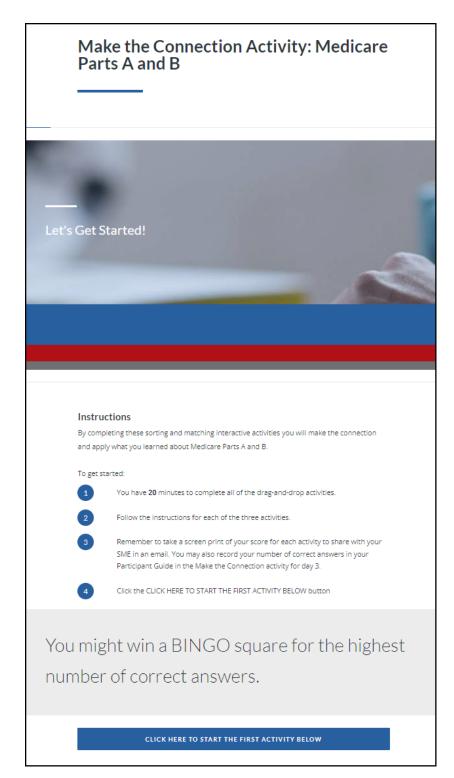
The following image is from the BINGO board created to keep the participants engaged throughout the week. Each time a participant proved they did an activity successfully; they earned a BINGO square. BINGO winners could earn a daily and/or weekly reward. (Gray blocks on image included to show earned squares.)





ELEARNING ACTIVITY

The following image is from the eLearning created in Rise. To access the full activity, click <u>here</u>.





INTERACTIVE ACTIVITIES

The following partial image is an example of an interactive activity the participants accessed via the training and participant guide.

