Project 2: Evaluation of an Instructional Product

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# Introduction

Millennium Insurance Company administers a variety of insurance policies that range from life insurance to annuities. The company’s customer service department is responsible for regularly reviewing customer requests such as premium applications, beneficiary changes, coverage adjustments and loan requests. Like so many other corporations in the United States, Millennium delegates the work connected with these processes to an offshore team of associates in New Delhi, India. By taking advantage of the lower operating costs of outsourcing, Millennium is able to remain competitive with other companies.

While many of the processes are completed using a predefined systematic procedure, the task of customer correspondence involves responding to specific policy inquiries that are made by the customer. Customer correspondence is the only remaining customer service process that is left to be migrated from the home office to associates in India. When migration is completed, responses will be sent by the offshore associates in India via regular mail and email through remote access of Millennium's administration software. Customers often make general inquiries, such as asking who their current policy beneficiary may be, or they may send a request to take a loan against a policy's cash value. These particular questions may be answered through the use of appropriate pre-written letter templates. Through the use of these templates the associate need only enter the relevant policy data and the company's letter writing software (*Quill*) does the rest. However, some inquiries require a tailored response and a canned letter is not sufficient to satisfy the customer's specific needs. In this case, a free form letter will need to be prepared that specifically addresses the customer's unique questions.

# Audience and Context

Millennium strives for excellent customer service, and therefore offshore associates must understand the fundamentals of writing well formatted free form letters for an American customer base. The quality of the overall response to customers depends on a properly structured letter. The letter structure should include a courteous opening, an informative body as well as a professional and considerate closing. The letter can be misinterpreted by the customer if an associate does not produce a clear and concise message. Based on this potential hindrance to provide excellent customer service, it was suggested that material promoting the ability to write effective business letters be included in the training of offshore associates. The currently proposed training material mainly focuses on the use of Millennium's letter writing system, known as *Quill*. Thus, there is not much emphasis placed on free form letter writing. In order to save money, the training department has chosen to utilize a free online tutorial that teaches effective business letter writing that also caters to an American customer base. One tutorial in particular was developed by Sophia that covers the basics of effective writing and even provides examples. The tutorial may be accessed using the following link: <http://www.sophia.org/tutorials/business-letter-basics> ("Business Letter Basics Tutorial | Sophia Learning," n.d.). Upper management has requested that an evaluation been conducted to ensure that the comprehensive content is well received by the learners and improves the offshore associates' ability to write letters to customers. The primary objective of the training is to determine if the tutorial effectively supplements the competency necessary to write an effective free form letter, and if the material learned boosts the confidence of the offshore representatives to write letters on a regular basis. If the evaluation reveals that the training material is effective and meets these objectives, the tutorial will be implemented as a regular part of training. However, if the tutorial does not increase the participants' knowledge of letter writing and confidence is not high among the participants, the training department must consider a more in-depth training component or develop a new course that focuses on letter writing.

The specific subject matter within the tutorial will be directed towards newly hired offshore associates in New Delhi, India. As the material has been deemed a mandatory part of the customer correspondence training process, all offshore associates who review and respond to customer inquiries will be required to complete the tutorial. The majority of the associates possess a high school education or equivalent. The team consists of over 40 individuals with a fairly evenly distributed ratio of males and females. The task managers who oversee the offshore customer correspondence team in India will also participate in the training. This is done in order to present an equal ground and emphasize the fact that business writing skills are valuable to all associates regardless of their position.

The tutorial includes an overview of the components of effective business letter writing as well as several modules including Tone in Business Writing ("Purdue OWL: Tone in Business Writing," n.d.), a Letter Writing Checklist, Cover Letters, Proposals and Block Letter Formatting. The training will only require participants to review the Business Letter Types and Basics module, that will be guided by a trainer, and the module on Tone in Business Writing. The Letter Writing Checklist will be proposed as a resource that may be used by the associates when they write letters after training is completed.

|  |  |
| --- | --- |
| Required Module Components | Content |
| Business Letter Types and Basics | * Why write letters * Four letter types * Letter organization * Style and tone of writing * Call to Action |
| Tone Makes All the Difference | * What is Tone? * Why am I writing this document? * What kind of tone should I use? |
| Letter Writing Checklist | * The elements to write a strong letter |

*Overview of required modules of Business Letter Basics ("Business Letter Basics Tutorial | Sophia Learning," n.d.)*

**Evaluation Instruments and Procedures**

The primary instruments of evaluation will utilize Level 1 (Reaction) and Level 2 (Learning) of the four levels of evaluation developed by Kirkpatrick & Kirkpatrick (2006). Levels 3 (Behavior) and 4 (Results) are not being incorporated at this time since it is yet to be determined whether the tutorial will become part of training on a long term basis.

Level 1 - Reaction Measurement

Upon completion of the required training modules, participants will be immediately directed to a survey link. The survey will be developed via a free online survey application such as surveymonkey.com ("SurveyMonkey: Free online survey software & questionnaire tool," n.d.). Participants must complete the survey in order for their training to be considered complete. This will help to ensure that 100 percent of responses will be received immediately (Kirkpatrick & Kirkpatrick, 2006). Furthermore, all responses will remain anonymous. This will be done in part to put participants at ease so that they may be more forthright in their responses, and not be subject to fear of repercussions if their reactions are critical (p.36).

As the survey will be presented immediately after the completion of the course, it will only consist of five close-ended questions, as open-ended questions are more likely to get "no response or thoughtless responses" ("Eight Tips on Developing Valid Level 1 Evaluation Forms," n.d.). The quantitative questions will primarily focus on how relevant the participants feel the content is to their job, the ease of understanding the material presented, how likely they will use the letter writing checklist, how confident they are in their ability to write free form letters, and how likely they will recommend the use of the material to other associates. The questions will consist of a 5 point rating system with descriptive words on each end (*see Appendix A*). An odd number of options are being used to offer the participants the option of selecting a neutral response (p. 4). In an effort to collect data on details of the tutorial that may specifically be viewed as helpful, a section for comments will be included in the online survey. The reaction survey will be evaluating the tutorial overall and will not be specified to the each of the individual modules

Level 2 - Learning Measurement

In order to measure any improvement in the associates' ability to write free form letters, both a pre-test and post-test will be conducted for the Business Letter Types and Basics module and the Tone Makes All the Difference module. The pre-test will be utilized to gauge any knowledge of business writing that the offshore associates may already possess. A free web-based testing application called ClassMarker will be used to administer the tests ("Online Testing Free Quiz Maker Create the Best web-based quizzes ClassMarker," n.d.). This application assists in expediting the results as it automatically calculates and grades the responses once the participant submit them. The post-test will be used to determine any specific points of improvement and new knowledge acquired from the modules within the tutorial. The correct answers to the pre-test will not be provided to the associates upon completion in order to ensure that the results of post-test rely strictly on any knowledge gained within the modules. Because the Letter Writing Checklist merely consists of elements already included in the previously presented material, its evaluation will be based on data provided in the reaction survey in level 1. There will be 5 questions associated with the Business Letter Types and Basics module (*see Appendix B*), and 5 questions associated with the Tone Makes All the Difference Module (*see Appendix C*). Each module test will consist of 2 True/False questions and 3 multiple choice questions. (NOTE: The commentary supporting the questions for the Business Letter Types and Basics module is assumed and may not be reflective of the intended instructional message.)

**Reporting**

All of the data gathered from the level 1 reaction survey will be averaged out based on the responses according to the rating scale. The results in this case will be subject to an average score of 4 and above which is considered to be a satisfactory standard. All responses of with an average of neutral (3) and below, will have their respective question element evaluated and reviewed for aspects of improvement.

Similar to the approach used for level 1, the level 2 learning data will be reviewed based on the average number of correct answers. The results of the pre-test and the post-test will also be compared and evaluated for individual gains, both for individual questions and questions overall. Based on the total of 10 questions, an average score of 8.0 and above is considered satisfactory.

If the results of both levels 1 and 2 are above their designated standard, the training department will integrate the material as part of the regular training curriculum. If either level 1 or level 2 results fall below their standard, the training department will need to determine if they can improve the way the material is presented. However if both level 1 and level 2 results fall below their respective standard, the training department will forgo the use of the tutorial. The management and training department will then need to determine if another program may be used or if a newly designed training effort is necessary.

# Appendices

Appendix A - Business Letter Basics Tutorial Reaction Survey

In order to improve the quality of training presented by the Training Department, please complete the following brief survey. Your feedback is highly valued and we would appreciate any additional comments you may have regarding the tutorial in the space provided at the end of the survey.

1. How relevant would you rate the material presented in the tutorial to your job?

Not relevant at all Very relevant

1 2 3 4 5

2. How easily understood was the material presented in this tutorial?

Very difficult Very easy

1 2 3 4 5

3. How likely is it that you will use the letter writing checklist to perform your job?

Not likely Very likely

1 2 3 4 5

4. How would you rate your confidence in your ability to write effective free form letters after completing this tutorial?

Not confident at all Very confident

1 2 3 4 5

5. How likely are you to recommend this tutorial to other associates?

Not likely Very likely

1 2 3 4 5

Comments:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Appendix B - Pre-test and Post-test for material included in Business Letter Types and Basics module  
  
For questions 1 and 2, please indicate whether the statements are TRUE or FALSE.

|  |  |  |
| --- | --- | --- |
| 1) |  | When writing a letter, it is important to keep your main points clear and brief. |
|  | a. | TRUE |
|  | b. | FALSE |
| 2) |  | The reason for writing your letter should be included in the closing paragraph. |
|  | a. | TRUE |
|  | b. | FALSE |

For questions 3 through 5, please indicate the correct answer to each question.

|  |  |  |
| --- | --- | --- |
| 3) |  | The following are common types of business letters, except: |
|  | a. | Inquiry |
|  | b. | Special Request |
|  | c. | Inventory Listing |
|  | d. | Customer Relations |
|  |  |  |
| 4) |  | Building goodwill and stating the purpose of the letter should be included in: |
|  | a. | The Conclusion |
|  | b. | The Introductory Paragraph |
|  | c. | Anywhere within the Letter Body |
|  | d. | The Greeting |

|  |  |  |
| --- | --- | --- |
| 5) |  | When building goodwill, positive language should include: |
|  | a. | Stating what you can do |
|  | b. | Stating what you could do |
|  | c. | Stating what the customer wants to hear |
|  | d. | Stating what you cannot do |

Answer Key

1. TRUE

2. FALSE

3. Inventory Listing

4. The Introductory Paragraph

5. Stating what you can do

Appendix C - Pre-test and Post-test for material included in the Tone Makes All the Difference module

For questions 1 and 2, please indicate whether the statements are TRUE or FALSE.

|  |  |  |
| --- | --- | --- |
| 1) |  | When you consider how to express your message, tone becomes more apparent. |
|  | a. | TRUE |
|  | b. | FALSE |
| 2) |  | Tone in writing includes the writer's attitude toward the reader. |
|  | a. | TRUE |
|  | b. | FALSE |

For questions 3 through 5, please indicate the correct answer to each question.

|  |  |  |
| --- | --- | --- |
| 3) |  | When considering tone, it's important to consider all of the following except: |
|  | a. | Describing your current mood |
|  | b. | Stressing benefits to the reader |
|  | c. | Writing at an appropriate level of difficulty |
|  | d. | Using appropriate emphasis and subordination |
|  |  |  |
| 4) |  | Examples of the use of non-discriminatory language include: |
|  | a. | Avoiding demeaning or stereotypical terms |
|  | b. | Using neutral job titles |
|  | c. | Using masculine pronouns |
|  | d. | Both A and C |
|  | e. | Both A and B |

|  |  |  |
| --- | --- | --- |
| 5) |  | Examples of stressing benefits to the reader include: |
|  | a. | Delivering good news in third person |
|  | b. | Writing from the reader's perspective |
|  | c. | Emphasizing what the reader can do for you |
|  | d. | Describing your in-depth thoughts |

Answer Key

1. TRUE

2. TRUE

3. Describing your current mood

4. Both A and B

5. Writing from the reader's perspective

# References

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