

David Kolmer

Jo Ann Mattson

IDT584-01W: Internship in Instructional Design and Technology

September 11, 2020

Detailed Description of Instructional Design Project

The SME

This content is being designed and developed by myself. I was working closely with the VP of HR Monica Burnett, however she has since left the company. I currently report to the CXO Chief Member-Experience Officer. We have had limited communication based on the fact that she is sitting in as an interim CEO Chief Executive Officer. (I seem to be drawn to this positions where the company is building the crashing plane in the air.)

If I had to quote a single person or source of information as a SME I would point to Stephen Covey. I am using the 7 Habits of Highly Effective people to guide me in my overall scope. In this outline Covey gives 7 habits or steps that guide professionals in using principles not personalities to move from dependence to independence and finally to interdependence. My plan was to be half way through the 7 habits at this point. However, with the departure of the CEO, the VP of HR and the COVID-19 pandemic paired with general apathy from the learner population, I am only now moving into the Stephen Covey content. I decided to take a step back and focus on basic communication skills and self-discovery content first. My hope is that this content will make the Stephen Covey content more relevant. For this content I have drawn from the work of the True Colors (<https://truecolorsintl.com/>) and ntrinsx (<https://www.ntrinsx.info/>) platforms.

Training Audience

The training audience is the workforce at Neighbors Credit Union, which are currently around 170 people. They all work at a financial institution however not all of them are member facing. Many of the long-term employees have moved to back-office positions, which vary, from Visa and accounting to Marketing and Information Technology.

Title and Purpose

Currently I am continuing to build content on a side project I have implemented which I call Communication Colors. This is in parallel or preparation for the main Service Standards content, which is titled GEAR UP! The purpose of the training content is to improve member service to increase the member experience while interacting with Neighbors Credit Union. Per my research I have found that the most current thoughts and evidence around service training are based in self-discovery and self-awareness. These types of learning experiences lead the learner into a

better understanding of them-self and how they fit into their environment, which leads to a deeper and more authentic expression of empathy.

Client

Neighbors Credit Union, Saint Louis, MO 63123

Needs Assessment

Neighbors Credit Union was originally the St. Louis Postal Workers Credit Union. There were initially two branches, one downtown Saint Louis on Market st and one in south county on 6300 South Lindbergh Blvd. Since the name change to Neighbors Credit Union the company has realized incredible success and has scaled up to 9 or 10 branches serving over 56,000 members with assets over \$715 million USD.

They have also implemented Interactive Teller Machines which are an (ATM enhanced with live video chat with an off site teller), a call center and web-based chat services, credit card services and a robust mortgage offering.

What has not happened is an increase in “member service”. The member service experience is comparable to that the small credit union being run by postal workers on a volunteer basis. The need is to grow the understanding of empathy and the service-mindset so that members will have a seamless experience that not only provides them with the financial products the need but also educates them on making sound financial decisions.

Training Modality

I am using a version of Articulate Storyline 3 licensed to Neighbors Credit Union through CUNA (Credit Union National Association)

Per the recent restrictions of the COVID-19 pandemic I have implemented virtual training sessions via the Microsoft TEAMS application. This is not a training platform and even lacks common functionality that Zoom and other web-conference platforms offer. I have used this as an opportunity to further develop my skills in providing technical step-by-step guides and instructional videos on using TEAMS. I have leveraged the record function in PowerPoint to add audio narration to each slide separately, export to MP4 and then host content over a relevant channel on the Microsoft STREAM application.

Additional information

All of this content must work with in the guidelines of the mission of Neighbors Credit Union.

NCU Mission: Providing awesome member experiences through innovative products, superior service and trusted advice, while strengthening our community with financial education. We are dedicated to the success of our members and employees to ensure we are the financial institution of choice.