Submission Overview

In 2019, Freedom Mobile (Freedom) launched its Digital Messaging Agent (Messaging Agent) program.

Now, customers can contact Freedom with questions or concerns using chat platforms such as Facebook Messenger, SMS, or online chat.

To prepare agents in responding to customer service inquiries via this new platform, Freedom partnered with Benchmark to create interactive orientation elearning.

In partnership with Freedom, Benchmark designed and developed five branched elearning modules that placed emphasis on practicing the skills needed to fulfill the duties of a Messaging Agent.

The solution

Freedom and Benchmark determined that since Messaging Agents would be working in a messaging environment, it would make sense to recreate the work environment for training.

Benchmark designed a messaging-style training program that was a narrative-driven experience wherein the learner would be "coached" by a chatbot to practice and learn expected behaviours.

Freedom and Benchmark had originally intended to deliver the training on Freedom's chatbot platform. While Benchmark has been able to develop the chatbot in FlowXO, logistical and licensing issues prevented the chatbot from being published. As a result, Benchmark used Storyline to develop the elearning for this submission.

WITH THIS SUBMISSION, BENCHMARK & FREEDOM DELIVERED AN ELEARNING EXPERIENCE THAT **IMMEDIATELY ENGAGED** LEARNERS AND HAD A **POSITIVE** AND **SIGNIFICANT IMPACT** ON THEIR ABILITY TO PERFORM ON THE JOB.

This submission is worthy of celebration because it:

1. Differs from traditional elearning, in that it consists solely of a series of online conversations with a fully realized chatbot named RosieBot;

2. Demands that the learner build skills and knowledge by interacting with RosieBot and the scenarios she presents;

3. Emulates online messaging conversations that the Messaging Agent has with customers daily, embedding transfer of knowledge into the real world as part of the program;

4. Is principle-based, designed to allow learners to apply the concepts taught in the learning to any new customer situation;

5. Uses a UI (User Interface) that mirrors messaging UI on popular platforms and is similar to the software that Messaging Agents use in their day-to-day work, and

6. Replicates the activities and actions of a Messaging Agent.

Program Overview

The Messaging Agent Orientation program consists of the following:

- Five chat-based elearning modules:

    Module 1: What do you mean?

    Module 2: Six Rules for Chatting with a Customer

    Module 3: Resolving a Customer Issue

    Module 4: Taking Customer Service to the Next Level

    Module 5: The Ultimate Challenge

- One Setting Expectations Module, which includes:

    Job Aid 1: Managing Multiple Concerns

    Job Aid 2: Managing Multiple Chats

    Job Aid 3: Continuing a Chat Started by another Messaging Agent

- Practice roleplay scenarios – roleplaying customer scenarios over Freedom's messaging platform.

Success in Resolving the Business Need

The result of this design approach was overwhelmingly positive.

Learners:

- Were enthusiastic about this learning and appreciated completing learning in an environment which they would work. Training in a parallel environment augmented their learning and allowed them to focus on performance outcomes;

- Found that the elearning was structured in a logical way and intuitive to learning the required skills;

- Found the interactions and experiences felt natural, and positively and directly impacted their needs;

- Felt more prepared for their role as a result of training as the key messages were principle-based and asked learners to use these principles to practice multiple scenarios; and

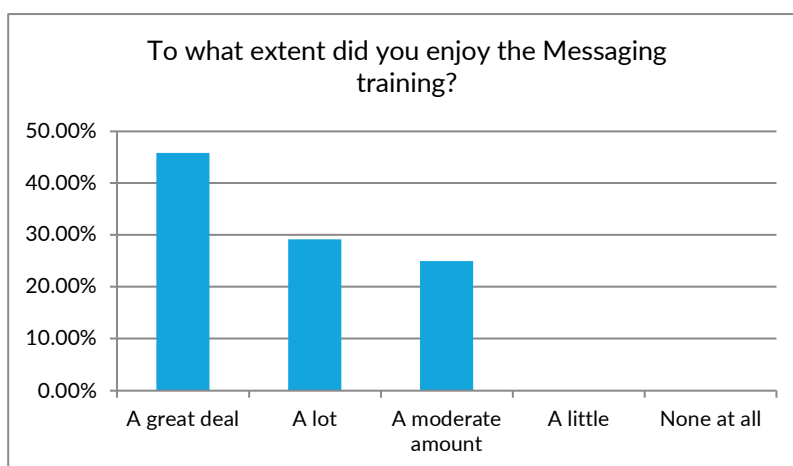- Experienced no extrinsic cognitive load when navigating the interactions.

Figure 1 *76% of respondents felt prepared "A great deal" or "A lot" after completing this training.*

Post-training, the two most important metrics that Freedom measured were Customer Satisfaction and Meaningful Connection. Freedom's post-training metrics showed the training helped the Messaging Agents beyond their expectations.

"[Messaging Agents] performed above some end-state targets, suggesting [the submission] met the requirements intended to a high degree."

- Customer Care, Freedom Mobile

Relevance

The degree to which the interaction includes performance and learning structure and content. In addition to well-developed goals, visual effects, and enhanced learning, the interaction provides interactive learning that engages the learner and positively impacts their needs.

To emulate the environment in which the learners would be working, Benchmark and Freedom designed and developed a chatbot character to coach the learner through all of the performance objectives below. By the end of the modules, learners would be able to:

1. Validate the customer's tone and meaning,

2. Respond to customers in 140 characters or less per chat message,

3. Respond to customers using appropriate syntax,

4. Respond to customers using semantics appropriate to a 'chat' environment, and

5. Apply Freedom's customer service model to a chat conversation.

To ensure that the material was relevant to the learners to the work that would be conducted in online messaging environments, the interactions were presented as a chat between the chatbot character (a.k.a. "RosieBot") and the learner.

Chatbots are at their core "conversational" and require immediate dialogue with the learner.

Additionally, a chatbot UI (User Interface) does not lend itself to the use of paragraphs, thereby eliminating the usefulness of text-heavy exposition or "teaching".

Benchmark designed a different approach to communicating expectations, explaining concepts, and delivering teaching.

1. RosieBot conducts all communication with the learner as a conversation. The course, as a whole, is structured as a series of conversations (1 conversation takes place per module, and one performance objectives is covered per module), with each conversation building upon the previous.

    i. For the communication to feel natural and the experience to be relevant, Freedom and Benchmark created a persona for RosieBot. This persona informed the tone in which information is communicated with the learner.[*]

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[*] **RosieBot's Persona:** RosieBot is a bubbly, driven and ambitious personality. RosieBot wants to make a difference in the world and wants to bring you (or whomever she's speaking with) along on that journey.

2. All instruction is presented in short increments (5-10 minutes per module) and require the learner to respond to RosieBot:

   a. Learners are presented with scenarios based on customer interactions and asked to choose the best response.

   b. Learners are allowed to experiment with responses and make mistakes; ill-advised choices resulted in corrective feedback and the opportunity to revisit the scenario.

   c. Learning comes through short interactions and feedback related to the learner's most recent decision. The interactions are scaffolded. Each interaction and conversation/module is built upon, and iss more challenging, than the previous.

3. Every single 'chat' message 'sent' by RosieBot was less than 140 characters. If a concept was more complicated, RosieBot broke the message into two or more separate message bubbles.

4. Because natural conversations between two individuals never started with an objective, the presentation of performance objectives were embedded as part of the conversation between RosieBot and the learner.

   a. The presentation of the module's performance objective would be prefaced with an introductory conversation and interaction. Learners would be told by RosieBot exactly **what** she expected of them in the interaction as part of the conversation.
   (See example below).
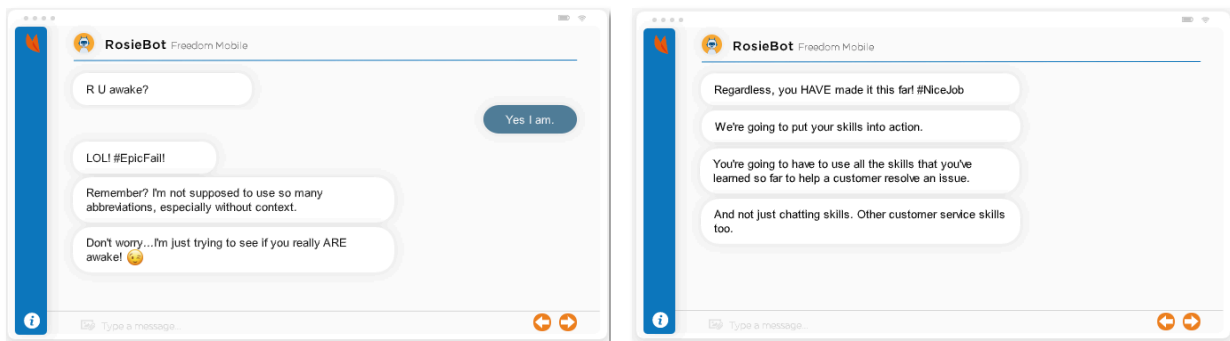
She knows pretty much everything about helping Freedom Mobile customers and loves it when people are passionate about what they do. She can be a little impatient if someone's not listening to her or disrespecting her, or if she's left waiting… after all, she has lots to do, and many people to help.

The Outcome

Learners found the modules to be engaging and relevant to their experience. They appreciated the different approach to training and the ability to practice what they had learned. The interactions and experiences felt natural, and positively and directly impacted their needs.