ATD Certification Institute
CPLP Practice Case Study: BZL Wealth Management

Scenario Narrative

BZL Wealth Management, a financial services company offering wealth and asset management to individual consumers and businesses, employs 650 employees across all continents. BZL Wealth Management relies on their 14 service delivery supervisors to function as role models and advisors to their teams on customer service matters.

There have been deficiencies identified in meeting customer expectations as well as declining customer service standards for phone and email etiquette. A communication skills refresher training course is indicated for service delivery supervisors to achieve their department’s strategic initiative goal.

The talent development professional has been provided the materials to conduct a two-hour classroom training course.

Supporting Documents:
1. Service Delivery Supervisor Training Email
2. Design Document
3. Telephone Customer Service Standards
4. Welcome and Introductions
5. Training Objectives
7. Simulation Activity Feedback Form
Good day leadership team -

Thank you for supporting the pending service delivery supervisor training. The first course in the learning path will be “Customer Service – Phone and Email.” There will be two classroom sessions scheduled. The first will begin on June 26 at 9:00-11:00 a.m. EDT and the second on July 8 at 2:00-4:00 p.m. EDT. There will be seven participants attending each of the two sessions. The schedule for the remaining sessions will be sent at a later time.

Below is the complete learning path course assignments for service delivery supervisors.

<table>
<thead>
<tr>
<th>Hours</th>
<th>Learning Path: Service Delivery Supervisor</th>
<th>Course Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.0</td>
<td>Mandatory</td>
<td>Customer Service - Phone and Email</td>
</tr>
<tr>
<td>1.0</td>
<td>Mandatory</td>
<td>Internal Customer Service</td>
</tr>
<tr>
<td>1.0</td>
<td>Mandatory</td>
<td>Customer Service with Writing</td>
</tr>
<tr>
<td>3.5</td>
<td>Mandatory</td>
<td>Communication Skills</td>
</tr>
<tr>
<td>1.0</td>
<td>Optional</td>
<td>Managing Change</td>
</tr>
<tr>
<td><strong>Course:</strong></td>
<td>Customer Service – Phone and Email</td>
<td></td>
</tr>
<tr>
<td>----------------</td>
<td>-------------------------------------</td>
<td></td>
</tr>
<tr>
<td><strong>Instructional Designer:</strong></td>
<td>Alex Tobin</td>
<td></td>
</tr>
<tr>
<td><strong>Facilitator:</strong></td>
<td>Jamie Daniels</td>
<td></td>
</tr>
<tr>
<td><strong>Project Manager:</strong></td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td><strong>Project Owner:</strong></td>
<td>N/A</td>
<td></td>
</tr>
</tbody>
</table>
| **Business Goals:** | Enable associates to:  
  ○ Function as role models and advisors to their teams on customer service matters. |
| **Course Goals:** | By attending this course, participants will be able to answer internal customer questions. |
| **Course Objectives:** | After attending the training course and using reference materials provided, participants will be able to:  
  ○ Describe, using practical examples, how the SERVICE acronym applies to the team's work.  
  ○ Given the Communications and Customer Service Standards, restate the rules related to email and phone use.  
  ○ Identify motivational strategies to help the team exceed the customer's expectations or, in other words, “go the extra mile” in service. |
<p>| <strong>Target Audience:</strong> | Service delivery supervisors |
| <strong>Delivery Strategies:</strong> | Instructor-led classroom, discussion, group activities, simulations |</p>
<table>
<thead>
<tr>
<th>Objective:</th>
<th>Estimated Time</th>
<th>Content Outline</th>
<th>Activity/Assessment</th>
<th>Resources/Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Welcome and introductions</td>
<td>15 minutes</td>
<td>Welcome: 1. Facilitator introduction 2. Participant introductions</td>
<td>Repeat something shared and validate introductions</td>
<td></td>
</tr>
<tr>
<td>Course overview</td>
<td>5 minutes</td>
<td>Introduce main topics and course goals.</td>
<td></td>
<td>Presentation slides</td>
</tr>
<tr>
<td>Topic 1: SERVICE and Your Team's Work</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Present the SERVICE concept.</td>
<td>15 minutes</td>
<td>Review SERVICE acronym.</td>
<td>Ask participants to write down two examples for each concept.</td>
<td>Presentation slides</td>
</tr>
<tr>
<td>Given practical examples,</td>
<td>20 minutes</td>
<td>Have each person read one example from their list and ask everyone else to</td>
<td>Group activity - Raise the card that best matches the concept to the example.</td>
<td>S/E/R/V/I/C/E cards (10 sets provided)</td>
</tr>
<tr>
<td>identify the SERVICE category</td>
<td></td>
<td>identify which concept best describes that action.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Topic 2: Communications and Customer Service Standards</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Restate standards.</td>
<td>20 minutes</td>
<td>Review phone and email standards.</td>
<td></td>
<td>Presentation slides</td>
</tr>
<tr>
<td></td>
<td>25 minutes</td>
<td>Go through phone and email simulations.</td>
<td>Simulation activity - Fill out feedback forms for participants</td>
<td></td>
</tr>
<tr>
<td>Topic 3: Motivational Strategies</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Identify motivational strategies.</td>
<td>20 minutes</td>
<td>1. Review motivational strategies. 2. Have each person create a motivational poster or find one online that can be printed.</td>
<td>Materials for posters  Computer with internet access</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>120 minutes</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Supporting Document 3: Telephone Customer Service Standards

BZL Wealth Management Customer Service Standards

To provide outstanding service to internal and external customers, I will uphold the following standards:

ON THE TELEPHONE

I will...

1. Answer the telephone within three rings if I am at my desk and not already serving a customer.
2. Whenever possible, forward my phone to a colleague who can cover my calls if I am unavailable.
3. Use a professional greeting such as “Good morning [or afternoon], [my name], BZL Wealth Management, [my department]. How may I help?”
4. Smile when I speak so that customers will hear a friendly tone.
5. Ask the caller’s name and use it during the conversation.
6. Keep voicemail greetings current, indicating alternate contacts and a date of return when I am away from my desk for longer than half a day.
7. Before transferring a call, advise both the caller and the recipient of the reason for the transfer and to whom they will be speaking.
8. Not put a customer on hold for longer than 30 seconds; if additional time is required, offer to call them back or allow them to continue holding.
Supporting Document 4: Welcome and Introductions

Facilitator Script

Hello and welcome to our service delivery supervisors. Welcome to the first day of your Service Delivery Supervisor Training and the Customer Service – Phone and Email course. Let me tell you a bit about myself and then you will each have the opportunity to share your name, goals, and any other information you would like to share about your work at BZL Wealth Management.

My name is Pat, and I am a Talent Development Professional. I am delighted to be your facilitator today. I read once, “Find the job you love and you’ll never have to work again.” I am fortunate in that I found a job that I love and enjoy on so many levels. I’ve been with BZL Wealth Management for nearly 15 years and in Learning and Development for 10 of those years. I have facilitated many courses, designed training, and hosted numerous webinars. On a personal level, I am a wife and mother of two wonderful sons. One is in middle school, and the other will be heading off to college in the fall.

Ok, now it is your turn! Who would like to introduce themselves first?

Note: As each participant introduces themselves, make sure to repeat back something they shared, validate their introduction, etc.

Thank you for introducing yourselves; now let’s look at our objectives.

Supporting Document 5: Training Objectives

Facilitator Script

Before we begin our training, let’s step through what you are going to learn today.

First, you will be able to describe, using practical examples, how the SERVICE acronym applies to your team’s work. We will discuss each of these in detail during this course. The acronym, SERVICE, represents our key customer service message of:

S: Seamless delivery
E: Employee responsibility
R: Relationship minded
V: Value-added products
I: Innovative problem solving
C: Customer friendly
E: Ethical standards

Then, when given the Communications and Customer Service Standards, you will be able to restate the rules related to email and phone use. We will go through each of these so you have a greater understanding.

Finally, you will be able to identify motivational strategies to help your team exceed expectations, or in other words, “go the extra mile” in service after we go through this training today. Ok, let’s get started!

Program: Customer Service – Phone and Email

Duration: 2 hours

Date: June 26

Facilitator: Jamie Daniels

Learning Objectives

1. Describe, using practical examples, how the SERVICE acronym applies to your team’s work.
2. Given the Communications and Customer Service Standards, restate the rules related to email and phone use.
3. Identify motivational strategies to help your team “go the extra mile” in service.

Please rate the following statements by circling your selection.

1 = poor 2=fair 3=neutral 4= very good 5 = excellent

Planning and organization of training
Size of group
Handouts and visual aid relevance
Presentation met the identified objectives
Facilitator
Your overall level of participation
Overall training evaluation

Please provide your responses to the following questions:

1. What parts of the training did you like and why?

2. What would you have liked to cover in this training that was not covered?

3. What suggestions do you have for future sessions?
Supporting Document 7: Simulation Activity Feedback Form

To: John Participant, Customer Service Supervisor

From: Jamie Daniels

Phone Studio Simulation - Exercise 1: Demonstrating the SERVICE standards

<table>
<thead>
<tr>
<th>Skill Observed</th>
<th>Rating (1-5)</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Friendly greeting</td>
<td>5</td>
<td>The energy and welcoming tone was perfect.</td>
</tr>
<tr>
<td>Explaining value added materials</td>
<td>3</td>
<td>Discuss prospectus with each customer. Tailor the message as per the client need.</td>
</tr>
<tr>
<td>Listening skills</td>
<td>3</td>
<td>Take care to let customer finish speaking – 4 second pause.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Listen to emotions and feelings as well.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Listen to understand, not to reply.</td>
</tr>
<tr>
<td>Follow-up expectations</td>
<td>3</td>
<td>Remember to confirm with the customer when they can expect a call back.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Summarize agreed upon action points.</td>
</tr>
<tr>
<td>Clear and direct language</td>
<td>5</td>
<td>Keep on using the sharp professional vocabulary.</td>
</tr>
<tr>
<td>Professionalism</td>
<td>4</td>
<td>Very clear and direct – great job!</td>
</tr>
</tbody>
</table>

Email Simulation – Exercise 2: Writing the SERVICE way

<table>
<thead>
<tr>
<th>Skill Observed</th>
<th>Rating (1-5)</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sentence structure</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Grammar</td>
<td>4</td>
<td>Review their vs. there.</td>
</tr>
<tr>
<td>Spelling</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Attaching Value Added Products</td>
<td>3</td>
<td>Ensure prospectus and marketing slicks are attached.</td>
</tr>
<tr>
<td>Professionalism</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Overall</td>
<td>4</td>
<td></td>
</tr>
</tbody>
</table>
BZL Wealth Management SAE Case Study
Training Delivery Practice Test Questions

1. Which supporting document best illustrates Herrmann's left-brain (limbic) approach to learning? Choose ONE.
   A. Supporting Document 3: Telephone Customer Service Standards
   B. Supporting Document 4: Welcome and Introductions
   C. Supporting Document 5: Training Objectives
   D. Supporting Document 6: Learning and Development Evaluation

2. During Topic 2, the technology fails. To keep training on track and still meet objectives, what should the trainer do? Choose ONE.
   A. Take a break until the Information Technology (IT) professional fixes the technology.
   B. Present standards on flip charts and pair the learners for the simulation.
   C. Skip the topic and move on to Topic 3.
   D. Present standards on flip charts and bring in supervisors to help with paired learner simulations.

3. What type of delivery option or media might the talent development professional consider for this training if time and space are limited? Choose ONE.
   A. Reflective learning
   B. Blended learning
   C. Socratic method
   D. Appreciative inquiry

4. Which activity would best address the deficiency related to value-added products as outlined in "Supporting Document 7: Simulation Activity Feedback Form"? Choose ONE.
   A. Distribute an exit slip.
   B. Have participants each state one thing they learned.
   C. Determine a call to action.
   D. Provide a self-assessment checklist.

5. How can the talent development professional better assist participants to accomplish the objective of identifying motivational strategies? Choose ONE.
   A. Ask participants to get approval from the legal department before downloading images to print.
   B. Create a list of example sites on which the participants may search for images.
   C. Ask participants to repeat the instructions before completing the activity.
   D. Discuss difficulties participants had with this activity.

6. Based on "Supporting Documentation 2: Design Document," which of the four elements of oral presentation is missing? Choose ONE.
   A. Close
   B. Opener
   C. Body
   D. Bridge
7. Which of Gardner’s multiple intelligences does the talent development professional include in the activity in “Topic 2: Communications and Customer Service Standards”? Choose ONE.

A. Naturalistic
B. Bodily/kinesthetic
C. Intrapersonal
D. Existential

8. Which activity within “Supporting Document 2: Design Document” will give the trainer the best early indication of potential success of the program and directly relates to Kirkpatrick’s Level 3? Choose ONE.

A. Topic 1: Group activity
B. Topic 2: Simulation activity
C. Topic 3: Review motivational strategies
D. Topic 3: Create a motivation poster

9. Within “Supporting Document 5: Training Objectives,” which level of Bloom’s Taxonomy would Objective 2 be listed under? Choose ONE.

A. Application
B. Comprehension
C. Synthesis
D. Knowledge

10. The instructional designer informed the talent development professional that mastering the SERVICE acronym was one of the course objectives. What kind of objective is this? Choose ONE.

A. Terminal objective
B. Training objective
C. Main objective
D. Enabling objective

11. "Supporting Document 7: Simulation Activity Feedback Form" was used by the talent development professional as part of which of the following? Choose ONE.

A. Evaluation of Kirkpatrick Level 4
B. Human performance improvement (HPI) model
C. Intervention implementation
D. Root cause analysis

12. Which techniques were used to increase the longevity and relevance of the training? Choose FOUR.

A. Simulation
B. Welcome and introductions
C. Handout of presentation slides
D. Motivational strategy activity
E. Simulation activity feedback form
F. Learning and development evaluation
G. Customer service standards card activity
H. Service delivery supervisor email with attachment

A. Multidimensional approach  
B. Providing a comfortable and colorful setting  
C. Making learning fun  
D. Accommodating different learning styles  
E. Group-based learning

14. Which facilitation questions will support on-the-job application of the first course objective in "Supporting Document 2: Design Document"? Choose THREE.

A. When this concept is successfully implemented, what does it look like?  
B. In what ways do people struggle while implementing this concept?  
C. What other experiences can you share about this example?  
D. Can you repeat the SERVICE acronym definitions?  
E. Do you have any questions about this concept?  
F. Are any of these concepts confusing?

15. What are the most important factors that should be considered prior to delivering the simulation portion of “Topic 2: Communications and Customer Service Standards”? Choose TWO.

A. Plan to restate the overall objectives.  
B. Create a visual to illustrate the activities.  
C. Prepare an icebreaker to build trust.  
D. Practice a field test with the technology.  
E. Develop behavioral questions to guide the debrief.

16. The talent development professional has been asked to assist with a Kirkpatrick Level 3 evaluation. To support this level of evaluation, which questions would need to be added to “Supporting Document 6: Learning and Development Evaluation”? Choose TWO.

A. What training activities did you find most relevant to your job and why?  
B. How will you use the skills and knowledge learned in training back on the job?  
C. Would you recommend this facilitator to your co-workers?  
D. How did the facilitator keep you involved during the training session?  
E. Was the training environment conducive to learning?

17. Prior to having participants write down examples of each concept during "Topic 1: SERVICE and Your Team's Work," what should the talent development professional do to ensure that learners understand how to complete the activity? Choose TWO.

A. Provide an example of the concept.  
B. Pair learners into groups of two to discuss questions they may have.  
C. Assign a participant to explain instructions, using their own words, to demonstrate comprehension.  
D. Have participants review questions from "Supporting Document 7: Simulation Activity Feedback Form."  
E. Prepare written instructions on a flip chart or wall chart.
18. What are the best ways for the facilitator to match her presentation style to the learners? Choose TWO.
   A. Change the rating scale within the activity feedback form to ensure clear distinctions are made.
   B. Make adjustments within the welcome and introductions to better engage learners.
   C. Revise materials based on previous responses from post-course evaluations about what could be added to the course.
   D. Prior to class, obtain preferred learning style information from the learners.
   E. Describe to the participants the facilitator’s individual learning style.

19. Midway through the training session, the talent development professional notices most of the participants are reluctant to respond to questions and do not appear motivated to participate in activities. What are the best responses to this situation? Choose TWO
   A. Remove the tables from the room and create a circle with the chairs.
   B. Take a five-minute break and ask one to two participants with whom the talent development professional is comfortable what may be preventing discussion.
   C. Make adjustments within the delivery style content of the welcome and introductions section of the course.
   D. Call directly on individual participants who are not participating to recite the SERVICE acronym to help break the ice.
   E. Push through the session; Knowles' theory states that learners will solve barriers during the activities.

20. After reviewing “Supporting Document 2: Design Document,” what additional engagement strategies could the talent development professional use to improve the application of the content in "Topic 2: Communications and Customer Service Standards"? Choose TWO
   A. Ask the learners to complete a multiple-choice test on the customer service standards.
   B. Place learners into triads to discuss how they will use the customer service standards on the job.
   C. Ask learners to read over the customer service standards and memorize them.
   D. Form teams of three or four to learn and present portions of the customer service standards to the large group.
   E. Follow the content outline from the instructional designer and create a lecture covering all of the key customer service concepts.
<table>
<thead>
<tr>
<th>Number</th>
<th>Answer Key</th>
<th>Question</th>
<th>Rationale</th>
<th>Reference in CPLP Learning System 2017 Version</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>A</td>
<td>Which supporting document best illustrates Herrmann's left-brain (limbic) approach to learning? Choose ONE.</td>
<td>The Customer Service Standards are organized, sequential and provide specific procedures to follow, all of which target the Left brain (limbic) learner. Answer A.</td>
<td>CPLP LS 2017 2.2.8 The Whole Brain Thinking Model</td>
</tr>
<tr>
<td>2</td>
<td>B</td>
<td>During Topic 2, the technology fails. To keep training on track and still meet objectives, what should the trainer do? Choose ONE.</td>
<td>The standards can easily be transferred onto flip charts, and the simulation activity does not require technology. Pairing the learners allows them to play the different roles required for the activity. Answer B.</td>
<td>CPLP LS 2017 3.5.7 Games and Simulations</td>
</tr>
<tr>
<td>3</td>
<td>B</td>
<td>What type of delivery option or media might the talent development professional consider for this training if time and space are limited? Choose ONE.</td>
<td>Blended learning is a planned combination of training delivery options that allows the TD professional to pair face to face training with online or other non-class options. &quot;Blended learning optimizes resources, providing the most effect for the least investment.&quot;</td>
<td>CPLP LS 2017 3.5.1 Blended Learning 3.5.2.1 When to Use Online Learning or Classroom Training</td>
</tr>
<tr>
<td>4</td>
<td>D</td>
<td>Which activity would best address the deficiency related to value-added products as outlined in &quot;Supporting Document 7: Simulation Activity Feedback Form&quot;? Choose ONE.</td>
<td>While the feedback form is an important tool, the student's self-evaluation can help to show possible gaps between self-perception of performance and another's perception of the performance and lead to greater future performance.</td>
<td>CPLP LS 2017 2.9.2 How to Align Instructional Methods to Course Content 5.3.6.4 Self-Evaluations</td>
</tr>
<tr>
<td>5</td>
<td>B</td>
<td>How can the talent development professional better assist participants to accomplish the objective of identifying motivational strategies? Choose ONE.</td>
<td>Following the ATD Code of Ethics, the trainer is expected to follow copyright laws. The trainer should ensure that the learners understand why specific sites are recommended because of copyright laws.</td>
<td>CPLP LS 2017 3.10.1 Copyright and Fair Use Laws 6.8.9 Ethical Standards 6.8.9.3 ATD Code of Ethics</td>
</tr>
<tr>
<td>6</td>
<td>A</td>
<td>Based on &quot;Supporting Documentation 2: Design Document,&quot; which of the four elements of oral presentation is missing? Choose ONE.</td>
<td>A is the correct answer because there is no closing element in the Design document.</td>
<td>CPLP LS 2017 3.7.1.2 Basic Classroom Management, Structuring and Closing Presentations Effectively</td>
</tr>
<tr>
<td>Number</td>
<td>Answer Key</td>
<td>Question</td>
<td>Rationale</td>
<td>Reference in CPLP Learning System 2017 Version</td>
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<tr>
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<td>-----------------------------------------------</td>
</tr>
<tr>
<td>7</td>
<td>B</td>
<td>Which of Gardner’s multiple intelligences does the talent development professional include in the activity in &quot;Topic 2: Communications and Customer Service Standards&quot;? Choose ONE.</td>
<td>The activity presented for Topic 2 is a simulation where participants have to go through phone and email interactions. Of the choices provided, Answer B bodily/kinesthetic is the best choice. The simulation is a physical activity mimicking both phone and email interactions. Choice C is incorrect since intrapersonal is the aptitude for working alone and this activity is meant to simulate working with others.</td>
<td>CPLP LS 2017 2.2.10 Multiple Intelligences</td>
</tr>
<tr>
<td>8</td>
<td>B</td>
<td>Which activity within “Supporting Document 2: Design Document” will give the trainer the best early indication of potential success of the program and directly relates to Kirkpatrick’s Level 3? Choose ONE.</td>
<td>Because of the use of the phrase &quot;the best early indicator of potential success of the program&quot;, answer B is the correct answer. Level 3 Evaluations typically take place several weeks to three months after the training program. The simulation provides a Level 2 evaluation during the course and indicates how well the learner should be able to apply the knowledge taught.</td>
<td>CPLP LS 2017 5.1.6 Kirkpatrick's Evaluation Model; 3.2.3 Multiple Intelligences</td>
</tr>
<tr>
<td>9</td>
<td>B</td>
<td>Within “Supporting Document 5: Training Objectives,” which level of Bloom’s Taxonomy would Objective 2 be listed under? Choose ONE.</td>
<td>Answer B, Comprehension requires the ability to &quot;translate, describe, and explain information in one's own words&quot;. The learning objective says that the learner will have to be able to &quot;restate&quot; the email and phone rules which is akin to explaining information in one's own words.</td>
<td>CPLP LS 2017 2.8.2 and specifically 2.8.2.2 Bloom's Taxonomy; 2.9.2 Instructional Methods aligned to Bloom's Taxonomy</td>
</tr>
<tr>
<td>10</td>
<td>D</td>
<td>The instructional designer informed the talent development professional that mastering the SERVICE acronym was one of the course objectives. What kind of objective is this? Choose ONE.</td>
<td>&quot;Enabling objectives are goals that define the skills and knowledge learners must achieve during a learning event...&quot;</td>
<td>CPLP LS 2017 2.8.3.1</td>
</tr>
<tr>
<td>Number</td>
<td>Answer</td>
<td>Question</td>
<td>Rationale</td>
<td>Reference in CPLP Learning System 2017 Version</td>
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<tr>
<td>--------</td>
<td>--------</td>
<td>--------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-----------------------------------------------</td>
</tr>
<tr>
<td>11</td>
<td>B</td>
<td>&quot;Supporting Document 7: Simulation Activity Feedback Form&quot; was used by the talent development professional as part of which of the following? Choose ONE.</td>
<td>The Simulation Activity Feedback Form was used by the TD professional as a way to analyze performance and identify performance gaps which is one of the steps in the Human Performance Improvement (HPI) model (answer B). Answer A is incorrect since level 4 evaluation measures organizational impact a period of time after the training. Answer D, root cause analysis is incorrect because it doesn't determine the cause of the gap, only that the gap exists. Finally, Answer D, intervention implementation is a plausible answer since the training was part of the solution that was being implemented. However, since intervention implementation, evaluation of results and root cause analysis are all part of the HPI model, answer B is the best choice.</td>
<td>CPLP LS 20117 1.1.2.1 HPI Model</td>
</tr>
<tr>
<td>12</td>
<td>ADEG</td>
<td>Which techniques were used to increase the longevity and relevance of the training? Choose FOUR.</td>
<td>Answers A, D, E and G all represent active training techniques engaging the learners with variety that increases the longevity and relevance of the training.</td>
<td>CPLP LS 2017 3.7.1.4 Keeping the Energy Level High and Using Various Strategies</td>
</tr>
<tr>
<td>13</td>
<td>DE</td>
<td>Which accelerated learning techniques does the talent development professional use in &quot;Supporting Document 2: Design Document&quot;? Choose TWO.</td>
<td>The first three answers are elements of accelerated learning, but there is no evidence in the case that these techniques were used. Answer E, group-based learning was used in the group learning activities such as the activity under topic 1. Answer D, accommodating different learning preferences was also evident since the material was presented visually, verbally and kinesthetically.</td>
<td>CPLP LS 2017 2.3.1.2 The Design Value of Learning Modalities 2.4.8 Accelerated Learning</td>
</tr>
<tr>
<td>Number</td>
<td>Answer Key</td>
<td>Question</td>
<td>Rationale</td>
<td>Reference in CPLP Learning System 2017 Version</td>
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<td>14</td>
<td>ABC</td>
<td>Which facilitation questions will support on-the-job application of the first course objective in &quot;Supporting Document 2: Design Document&quot;? Choose THREE.</td>
<td>By asking open-ended questions, the facilitator is stimulating discussion among the learners and encouraging them to relate their experiences to the new material. This helps learners to apply their knowledge in context on the job. Answer D, repeating the SERVICE acronym definitions might help with recall but not application of the concepts. Answer E and F are open ended but non-specific questions that do not specifically make connections with on-the-job situations.</td>
<td>CPLP LS 2017 3.7.6.1 Open-and Closed-Ended Questions; 2.2.2.3 Constructivism</td>
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<td>15</td>
<td>DE</td>
<td>What are the most important factors that should be considered prior to delivering the simulation portion of “Topic 2: Communications and Customer Service Standards”? Choose TWO.</td>
<td>Preparing for delivery is one of the Key Actions for the Training Delivery AOE. This includes practicing the materials and testing all of the technologies being used to ensure both familiarity and functionality. Conducting a debrief is the most important part of this training method. Trainers need to ensure they have time to conduct the debrief at the end of the simulation, and know what questions will help the learners retain the lessons best.</td>
<td>CPLS 2017 3.0 Chapter Introduction 3.9.3 Rehersals 3.7.3 Facilitating Learning Activities 3.7.4.1 Facilitation techniques 3.5.7 Games and Simulations</td>
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<td>16</td>
<td>AB</td>
<td>The talent development professional has been asked to assist with a Kirkpatrick Level 3 evaluation. To support this level of evaluation, which questions would need to be added to “Supporting Document 6: Learning and Development Evaluation”? Choose TWO.</td>
<td>Asking what the learner found most relevant and why, as well as how they will use the skills and knowledge as they work, provides the learner with expectations of themselves and the trainer with some information about how the learner expects the skills and knowledge to apply to their job. The trainer can then use the learners’ initial expectations as part of the level 3 evaluation in addition to those that were created as part of the original design.</td>
<td>CPLP LS 2017 2.1.6 Donald Kirkpatrick's Four Levels of Evaluation 3.0 Chapter Introduction</td>
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<td>17</td>
<td>AE</td>
<td>Prior to having participants write down examples of each concept during &quot;Topic 1: SERVICE and Your Team's Work,&quot; what should the talent development professional do to ensure that learners understand how to complete the activity? Choose TWO.</td>
<td>The trainer should provide examples which will help the users to understand what is expected of them in the exercise. Providing both oral and written instructions addresses different learning modalities to ensure that the learners are able to process the instructions in their preferred manner.</td>
<td>CPLP LS 2017 2.3.1.2 The Design Value of Learning Modalities 3.7.3 Facilitating Learning Activities 3.7.7.4 White Boards and Other Types of Boards</td>
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<td>18</td>
<td>BD</td>
<td>What are the best ways for the facilitator to match her presentation style to the learners? Choose TWO.</td>
<td>It is the trainer's responsibility to prepare the content, and one of the steps in this process is to understand the audience for the training session and adjust the welcome and introduction to better engage the learners. Understanding the learning preferences of the participants will help the trainer deliver training in a manner that is appealing to all of the learners.</td>
<td>CPLP LS 2017 2.3.1.2 The Design Value of Learning Modalities 2.9.3 Choosing Instructional Methods That Meet the Needs of the Target Audience ; 3.2.9 Identifying Training and Presenting Styles</td>
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<td>19</td>
<td>AC</td>
<td>Midway through the training session, the talent development professional notices most of the participants are reluctant to respond to questions and do not appear motivated to participate in activities. What are the best responses to this situation? Choose TWO</td>
<td>Elaine Biech recommends 10 techniques and activities trainers may use to increase participation during classroom sessions. Answer A corresponds to item 7 on her list &quot;Remove the Tables&quot; and Response C corresponds to item 1 on this list &quot;Encourage participation from the start&quot;. This scenario suggests that the trainer may not have created or maintained a safe learning environment from the beginning and may need to revisit the opening.</td>
<td>CPLP LS 2017 3.7.6.3 Participant Engagement Strategies</td>
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<td>20</td>
<td>BD</td>
<td>After reviewing &quot;Supporting Document 2: Design Document,&quot; what additional engagement strategies could the talent development professional use to improve the application of the content in &quot;Topic 2: Communications nd Customer Service Standards&quot;? Choose TWO</td>
<td>Placing learners into triads (Answer B) to discuss how they will apply the standards on the job will help learners to relate the standards to real-life scenarios, which will help them to apply them on the job. Forming teams and having them teach-back the information to the group also helps cement learning.</td>
<td>CPLP LS Section Section 2.2.2.3 Constructivism, 2.2.4.2 Andragogy; 2.2.5 Differences between teaching and facilitating learning.</td>
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