SKILLS APPLICATION EXAM (SAE)
VOX Modus Case
MANAGING LEARNING PROGRAMS

ASSOCIATION FOR TALENT DEVELOPMENT
ATD Certification Institute  
CPLP Case Study: VOXModus  

Scenario Narrative  

A multinational telecommunications company, VOXModus, advises corporate customers on the installation, expansion, or maintenance of solutions such as voice, network, and security products and services. Customer service representatives (CSRs) work directly with the clients, managing the full customer portfolio (package of services). They coordinate with operations advisors, located in the United States headquarters, on client service policies and procedures that support customer portfolio quality.

The Asia region business unit of the company has 520 CSRs. Of these, 390 work in the field offices of Hanoi, Beijing, Bangkok, Phnom Penh, Singapore, Tokyo, Jakarta, Manila, and Osaka; the remaining 130 CSRs work in the U.S. headquarters. The field-based staff members travel to neighboring countries approximately 60% of the time, using mobile tablets, phones, and video chat programs to conduct business and attend meetings. All CSRs are college educated.

The Asia region business unit manages approximately 275 client portfolios. The policies and procedures required to manage these portfolios differ depending upon the product, country, and client need.

After significant restructuring and policy reforms, the Asia region of the company has come to the attention of senior management because some of their performance measures have dropped significantly. These data points indicate a reduced quality of the overall client portfolio:

- The number of “complex cases” has increased by 25% in the past year. A complex case is a client portfolio not achieving progress on customer service and financial goals.
- Satisfactory goal measures have declined from 87% to 68%. The satisfactory goal measures define performance expectations.
- Operations advisors report an estimated 15% increase in requests for help by CSRs in that region; however, the help requests are not officially tracked because operations advisors are not designated as a help desk. These CSR inquiries have negatively impacted the operations advisors’ workloads.

To address the problem, the training department proposes the launch of a new learning program for CSRs in the Asia region. The new learning program, Seminar World, will address topics related to the declining key performance measures. The primary business goal for the pilot program is to improve the
overall quality of the client portfolios, with a focus on reducing the number of complex cases and improving satisfactory goal measures.

**Supporting Documents:**
1. Seminar World Project Treaty
2. Project Schedule
3. Needs Assessment Report
4. Emails Sent Throughout the Project

**Supporting Document 1: Seminar World Project Treaty**

**Scope and Mandate**
Beginning Q2, the company will offer a series of twenty 60-90 minute seminars on key topics, targeting customer service representatives (CSRs) responsible for portfolio management in the Asia region. Topics will be limited to core topics identified through a needs assessment. Seminars will be delivered using webinar platforms managed by IT. They will occur every other Wednesday at 8 or 9 p.m. EST. Recordings of each webinar will be posted for continued access. The scope of this project covers the planning, implementation, and initial evaluation of this learning program, which is to be piloted for one year.

**Strategic Alignment**
Seminar World will support the Asia region’s strategic objectives of improving portfolio quality.

**Key Deliverables**
- Select web conferencing platform to use.
- Deliver 20 clinics by webinar, with 25 participants per webinar, or 500 total.
- Provide a mid-year report.
- Create end-of program report with evaluation results and future recommendations.
- Organize project.

**Project Team**

<table>
<thead>
<tr>
<th>Role</th>
<th>Primary responsibilities</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Manager - Core</td>
<td>Manages the learning program:</td>
<td>Headquarters</td>
</tr>
<tr>
<td></td>
<td>o Oversees the project from start to finish</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o Identifies and manages resources</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o Establishes partnerships with other units</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o Recruits and prepares SMEs</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o Supervises team members</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o Coordinates communications among team members, stakeholders, and participants</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o Monitors project progress against milestones</td>
<td></td>
</tr>
<tr>
<td>Instructional Designer - Core</td>
<td>Part-time contract position:</td>
<td>Headquarters</td>
</tr>
<tr>
<td></td>
<td>o Advises on overall seminar creation</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o Assists SMEs with learning objectives and content</td>
<td></td>
</tr>
<tr>
<td>Role</td>
<td>Primary responsibilities</td>
<td>Location</td>
</tr>
<tr>
<td>------</td>
<td>--------------------------</td>
<td>----------</td>
</tr>
</tbody>
</table>
| Producer - Core | Part-time contract position:  
  - Manages all technical aspects of webinar  
  - Leads practice run through with SMEs as needed | Headquarters |
| Two Client Service Operations Advisors - Core | Subject matter expert:  
  - Monitors all projects in the region for quality  
  - Provides input into training content based on position as someone who handles CSR inquiries and understands regional issues | Headquarters |
| Program Assistant - Core | Part-time employee:  
  - Organizes event and marketing efforts  
  - Configures computers in training delivery rooms if needed  
  - Administers LMS | Headquarters |
| Project Sponsor – Non-core | Senior management representative:  
  - Manages operations unit responsible for Asia region client portfolios and supervisor of the project manager  
  - Has overall responsibility for the overall quality of the portfolios in the Asia region  
  - Ensures alignment of the project with the company’s business goals  
  - Communicates with senior management about the project | Headquarters |
| IT Advisor – Non-core | Advisor:  
  - Assists with technology needs and procurement | Headquarters |

Stakeholders include Operations Director (who reports to the VP on portfolio accomplishments) and Field Office Coordinators (liaisons assigned to the field staff of each country office who can identify training needs).

Governance/Approval: Regional learning committee

**Team Communications**
- Status meetings occur on Monday afternoons (may adjust frequency after initial project launch).
- Announcements and other materials are posted as needed on the internal collaboration site.
- Weekly updates to unit occur during the Thursday meeting.

**Assumptions and Dependencies**
- SMEs are available to train.
- Other high priority initiatives do not supersede this project.
- Current team members will not be affected by the restructuring and moved to other units.
- Timing of seminars is based on corporate training calendar and board package schedule. Changes in either could impact this project.
Key Issues and Risk Management

1. **New delivery format for everyone**

   Careful evaluation of which webinar tool to use. Use one of the existing tools so IT support is available. Producer hired for technological help during webinar. Enrollment will be limited to 25 participants. If an office signs on as a “participant,” that office will identify a single spokesperson to avoid overwhelming the facilitator.

2. **Key team member not available**

   To mitigate this risk, identify a backup SME and producer for each seminar.

3. **Scheduling conflict**

   Since seminars will be scheduled several weeks in advance, a high priority meeting or unforeseen conflict may arise. To mitigate this risk, include “make-up” seminar dates in the schedule.

4. **Information portal and LMS**

   If changes are rolled out in the portal or LMS, downtime may occur or content will need updating. To mitigate this risk, include the IT contact as an ancillary team member to improve communication.

5. **Inclement weather**

   Some weather events may make it difficult to get to the office on webinar days. To mitigate this risk, train and practice web delivery from the SME’s and producer’s homes.

### High-Level Project Schedule and Tasks

(All project and task schedules are separate documents.)

<table>
<thead>
<tr>
<th>Task ID</th>
<th>Description</th>
<th>Due Date</th>
<th>Resource</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Needs analysis</td>
<td>September 6</td>
<td>Project manager (PM), stakeholders, key performance data, survey</td>
</tr>
<tr>
<td>2</td>
<td>Secure budget</td>
<td>September 13</td>
<td>PM, learning committee, sponsor</td>
</tr>
<tr>
<td>3</td>
<td>Project schedule</td>
<td>October 2</td>
<td>Team and stakeholders</td>
</tr>
<tr>
<td>4</td>
<td>Communications and stakeholder engagement</td>
<td>October and ongoing</td>
<td>PM, project assistant, and sponsor</td>
</tr>
<tr>
<td>5</td>
<td>Resource management (hiring of consultants)</td>
<td>September 31</td>
<td>PM</td>
</tr>
<tr>
<td>6</td>
<td>Content and materials</td>
<td>October and ongoing</td>
<td>Team</td>
</tr>
<tr>
<td>7</td>
<td>Implementation</td>
<td>October and ongoing</td>
<td>Team</td>
</tr>
</tbody>
</table>

Updated 3.8.2019
**Budget** ($30,000 allocated for fiscal year July 1 through June 30)

<table>
<thead>
<tr>
<th>Item</th>
<th>Allocation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Virtual classroom hosting</td>
<td>250</td>
</tr>
<tr>
<td>Webcam and headsets</td>
<td>200</td>
</tr>
<tr>
<td>Laptop rental</td>
<td>500</td>
</tr>
<tr>
<td>Instructional designer consultant</td>
<td>16,000</td>
</tr>
<tr>
<td>Producer consultant</td>
<td>10,500</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$27,450</strong></td>
</tr>
</tbody>
</table>

**Adjustments**
Color-code project plan by role and add more detail to reduce confusion and inefficiencies and to improve implementation.

**Supporting Document 2: Project Schedule**

<table>
<thead>
<tr>
<th>Task ID</th>
<th>Task</th>
<th>% Complete</th>
<th>Start</th>
<th>Finish</th>
<th>Preceding Tasks</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Needs Analysis</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.1</td>
<td>Conduct assessment</td>
<td>100</td>
<td>Aug 19</td>
<td>Sept 3</td>
<td>None</td>
<td>Report written</td>
</tr>
<tr>
<td>1.2</td>
<td>Prepare and submit business case to regional learning committee for project approval</td>
<td>100</td>
<td>Sept 4</td>
<td>Sept 6</td>
<td>1.1</td>
<td>Committee approval received!</td>
</tr>
<tr>
<td>1.3</td>
<td>Conduct stakeholder analysis</td>
<td>100</td>
<td>Sept 4</td>
<td>Sept 6</td>
<td>1.1, 1.2</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Communication and Stakeholder Engagement</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.1</td>
<td>Conduct project kickoff</td>
<td>100</td>
<td>Sept 30</td>
<td>Sept 30</td>
<td>1, 2, 5</td>
<td></td>
</tr>
<tr>
<td>4.2</td>
<td>Conduct status meetings</td>
<td>100</td>
<td>Oct 15</td>
<td>June 30</td>
<td>4.1</td>
<td></td>
</tr>
<tr>
<td>4.3</td>
<td>Develop communication strategy</td>
<td>100</td>
<td>Oct 1</td>
<td>Oct 1</td>
<td>4.1</td>
<td></td>
</tr>
<tr>
<td>4.4</td>
<td>Implement communication plan</td>
<td>50</td>
<td>Oct 3</td>
<td>July 30</td>
<td>4.3</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Resource Management</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.1</td>
<td>Define team roles</td>
<td>100</td>
<td>Sept 17</td>
<td>Sept 19</td>
<td>1.3</td>
<td></td>
</tr>
<tr>
<td>5.2</td>
<td>Hire instructional designer</td>
<td>100</td>
<td>Sept 13</td>
<td>Sept 27</td>
<td>5.1</td>
<td>Occurred 10/3; late due to restructuring issues and delays on new contract hires</td>
</tr>
</tbody>
</table>

*NOTE: TASKS 2 & 3 OMITTED*

This needs assessment analysis was conducted to define CSR training needs concerning the decline in client portfolio management with regard to new policies and procedures.

The goals of the analysis are as follow:

<table>
<thead>
<tr>
<th>Goals</th>
<th>Data Source(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Define the target audience demographic.</td>
<td>Human resources records</td>
</tr>
<tr>
<td>Identify gaps between current and desired performance state.</td>
<td>Key performance data, email and telephone interviews, and staff survey</td>
</tr>
<tr>
<td>Determine the effectiveness of the current training approach.</td>
<td>Online manual, headquarters classroom training, and e-learning modules</td>
</tr>
<tr>
<td>Identify potential solutions for addressing additional training needs.</td>
<td>N/A</td>
</tr>
</tbody>
</table>
Summary: The majority of complex cases are actually not cases where progress was impeded. Rather, most complex cases have status reports that are missing or were rejected because they are incomplete or incorrect. These missing or incorrect reports cause the case to remain labeled “complex.”

CSRs have limited access to operations training with SMEs, most notably the operations advisors. There has been an increase in phone and email inquiries to the advisors/SMEs, who indicate that the emails and calls come mostly from newer CSRs. Many are repeat callers who need extra “hand-holding” even if they attended the headquarters’ training. The most common inquiries focus on completing forms and reports, confusion about complex processes such as bundled product invoices, and new network products being sold by the company.

CSRs report all of the following:
- Current training offerings are good.
- Classroom training is not always offered.
- Training is too long.
- Training is expensive to attend in terms of time and travel.
- E-learning modules do not always go into the depth that is needed for these multifaceted and changing customer situations.

Proposed Solutions

<table>
<thead>
<tr>
<th>Proposed Solution</th>
<th>Advantages</th>
<th>Disadvantages</th>
<th>Cost</th>
</tr>
</thead>
</table>
| 1. **In-Person Training:** Conduct in-person training in 5 hub offices within the Asia region with 5 SMEs from HQ traveling over 3 weeks.  
   - Face-to-face interaction welcomed by field staff  
   - Outreach opportunities for SMEs | Requires various departments to release SMEs for 3+ weeks of travel  
   - Expensive and would need to locate a funding source  
   - This delivery format for current training reaches only 11% of regional staff due to travel and schedule constraints  
   - Can be difficult to ensure consistency of content | Approximately $110K for travel, materials, and shipping costs  
   - Opportunity cost of SMEs spending significant amount of time traveling instead of working on projects |
| 2. **E-Learning:** Develop self-paced e-learning modules to cover topics in-depth. Post content in  
   - High current use of e-learning by staff  
   - Provides anywhere, anytime access  
   - Controls content consistency | Significant up-front resource commitment required from SMEs to participate in content development | Approximately $80 – $100K ($8 - $10K each for 10 modules) |
<table>
<thead>
<tr>
<th>Proposed Solution</th>
<th>Advantages</th>
<th>Disadvantages</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>LMS for access to HQ and corporate office staff.</td>
<td>o Allows for tailoring of content by audience</td>
<td>o Unstable content requires frequent updates o Long initial development time o Nuanced questions arise with these topics that require interactions with a SME</td>
<td>Maintenance costs of approximately $5 - $7K per year</td>
</tr>
<tr>
<td><strong>3. Webinar:</strong> Offer short clinics via webinar on targeted topics.</td>
<td>o Least expensive option o Allows for easier tailoring of content as needs change o CSRs pick and choose seminars they need to attend o CSRs can attend while on the road or as a group in the office o CSRs can get access to SMEs o With recorded versions, staff can access when most convenient and keep content consistent o Can be easily repurposed to classroom training if an SME is already traveling to the Asia region</td>
<td>o Requires facilitator and participants to be able to use virtual classroom software, which is a new training approach for the company o Will require hiring of a contract producer to assist with technological aspects of webinars o Some limits on interaction from face-to-face, especially with recorded version o Requires late evenings for SMEs to meet Asia time zone needs</td>
<td>$20K estimated</td>
</tr>
</tbody>
</table>

Updated 3.8.2019
Supporting Document 4: Emails Sent Throughout the Project

Date: October 11, XXXX
From: Project Manager
To: Producer
Subject: Follow-up to our weekly meeting

I wanted you to know that I spoke with your manager, and she has agreed to let you miss your mandatory unit meeting in order to attend our practice seminar run-through. I appreciate how difficult it can be to work on this project in addition to your regular work, and I want to thank you for keeping me in the loop about potential competing priorities.

Thanks, too, for your help in onboarding our new instructional designer and making sure she is aware of how our specific webinar technology works. Your input into the overall task planning schedule has been very helpful to me ensuring that it is accurate and achieved. As a reminder, please follow up with the IT coordinator in the Japan office.

Date: December 13, XXXX
From: Project Manager
To: Team, Asia Region CSRs, Stakeholders
CC: Program Sponsor
Subject: Seminar World Mid-Year Report

Attached is the mid-year report. I’m pleased to summarize the following:

For initial rollout (Q2) - 392 participants attended seven seminars, which exceeded quarterly projections of 125 and six. Operations advisors also report lower inquiry volume. Key performance data measures will be measured after three months. The evaluations also revealed peer-to-peer learning was a key takeaway from the seminars.

Individuals attended an average of 3.1 seminars each and gave the following feedback on a five-point scale:

- The facilitators were knowledgeable. 4.25
- The content was useful. 4.0
- The webinar technology was easy to use. 4.0
- I would recommend the seminars to a colleague. 4.21
- I plan to participate in future seminars. 4.20

Suggestions: reduce content to decrease intensity of information; encourage a slower pace of speaking by the trainer

I must thank my great team for their huge role in this success. They demonstrate our value of “Results Focused!”
Date: March 9, XXXX
From: Project Manager
To: Team, Asia Region CSRs, Stakeholders
CC: Program Sponsor
Subject: Seminar World Final Report

I’m pleased to report the successful outcomes of our seminar project, for which the final report is attached.

In summary:

- Delivered 23 seminars (goal was 20) and reached 579 participants in all Asia region offices (goal was 350).
- Staff training evaluations average 4.15 out of 5 across all measures.
- Key performance data: Complex cases are reduced by 15% and satisfactory goal ratios are up from 67.9% to 89.1%.
- Inquiries to operations advisors is down by 20%.

Lessons learned:

- Improve marketing of webinar recordings.
- Space seminars further apart for more preparation.
- Increase global/cultural awareness of trainers.

It takes a village, which includes all of you as well as my superb team! Your efforts ensured the program will continue next year and expand into two additional regions, with the addition of one dedicated part-time employee.
VOXModus Case Study – Managing Learning Programs

Practice Test Questions

1) Which activity is most important for the talent development professional to do prior to making decisions about future similar projects? Choose ONE.

   A. Expand the timeline for the project.
   B. Complete a cultural assessment.
   C. Conduct an organizational culture audit.
   D. Construct a rationale for technology choices.

2) Which indicator determined the appropriate learning program for the talent development professional? Choose ONE.

   A. Root causes were determined by the increase in complex cases and decline in satisfactory goal measures.
   B. Root causes were determined by the recent significant restructuring of the company.
   C. Root causes were determined by the changes in policy and procedures.
   D. Root causes were determined by the needs assessment.

3) The seven items in the "High-Level Project Schedule and Tasks" listed in “Supporting Document 1: Seminar World Project Treaty” reflect which of the following? Choose ONE.

   A. Milestones
   B. Summary tasks
   C. Critical path items
   D. Deliverables

4) Which activity did the talent development professional most likely perform to conclude that the complex cases were incomplete or incorrect? Choose ONE

   A. Root cause analysis
   B. Performance gap analysis
   C. Workflow analysis
   D. Resource analysis

5) VOXModus's project manager used which of the following as a primary consideration for selecting an appropriate webinar delivery technology to meet the company's objectives? Choose ONE.

   A. Education level of the field-based staff
   B. Access to technology
   C. Availability of IT staff support for platform
   D. Cultural acceptance of technology use
6) As a follow up to the Seminar World project, which of the following would be best for the talent development professional to post on the collaborative site for CSRs? Choose ONE.

A. Webinar recordings and instructions for using the webinar platform  
B. Directions on accessing the learning management system (LMS) portal  
C. Multilingual glossaries of industry jargon  
D. Blogs and wikis monitored by subject matter experts (SMEs)

7) Which of the following may have been a primary factor affecting peer-to-peer interaction and high session attendance rates? Choose ONE.

A. Ease of access to technology  
B. Attendees' high desire to improve  
C. Cultural norms  
D. Promotion of the program

8) Which option best prepares the CSRs to successfully complete cases? Choose ONE.

A. Simulations of complex calls, with user interaction, decision making, and reflection  
B. Text explanation of the importance of gathering the essential information to complete a call  
C. A video of actors portraying a complex call  
D. Drag-and-drop, matching, and multiple-choice knowledge exercises

9) The talent development professional created a budget of $27,450 and secured approval for an allocation of $30,000, generating a surplus of $2,550. Which course of action would be best for using the surplus? Choose ONE.

A. Give a bonus to both the talent development professional and the producer consultant.  
B. Purchase more webcams and headsets for future webinars.  
C. Provide learning transfer support tools for Asia region CSRs.  
D. Meet with the program sponsor to explore options for more training resources.

10) Which of the following participant feedback responses from the December 13 email would be most helpful in determining whether the learning would be used on the job? Choose ONE.

A. "The facilitators were knowledgeable." (4.25)  
B. "The content was useful." (4.0)  
C. "I would recommend the seminars to a colleague." (4.21)  
D. "I plan to participate in future seminars." (4.20)
11) Which approach would best capitalize on the evaluations revealing peer-to-peer learning as a key takeaway from the seminars? Choose ONE.

A. Recommend CSRs attend external training with their peers.
B. Suggest CSRs use internal chat features to ask questions of their peers.
C. Advise CSRs to ask their peers questions while the caller is on hold.
D. Encourage CSRs to visit the "CSR Best Practices Wiki" to review content posted by their peers.

12) Which leadership functions did the talent development professional use when proposing solutions? Choose TWO.

A. Planning
B. Controlling
C. Leading
D. Organizing
E. Coordinating
F. Directing

13) Which additional solutions could have been provided for the greatest impact on results? Choose THREE.

A. Job aids
B. On-the-job training
C. Policies
D. Coaching
E. Rewards
F. Mentoring

14) In which ways are the emails dated December 13 and March 9 examples of effective communication? Choose TWO.

A. They communicate the change initiative early so the reader is not surprised.
B. They influence the reader regarding vision and initiatives.
C. They show the strategic value that the learning function provides.
D. They ensure the message corresponds with the talent development professional's actions.
E. They identify gaps between current and desired performance states.

15) Which additional information from "Supporting Document 2: Project Schedule" would help the project manager monitor the project progress? Choose TWO.

A. Person responsible for each task
B. Hours needed to complete each task
C. Expected outcome of each task
D. Process supported by each task
E. Milestones for each task
16) In addition to training, which performance improvement options should be considered to best address the increase of calls to operations advisors? Choose TWO.

A. Create desktop guides for CSRs highlighting the essential data required to complete a case.
B. Create a tracking system to quantify the number of calls to the operations advisors.
C. Improve data entry by making essential data fields required to complete a case.
D. Instruct the CSRs to call a supervisor rather than the operations advisors.
E. Create an accessible content management system (CMS) for CSRs to use.

17) Which of the following prior experiences are most important when selecting a candidate for the contract producer role? Choose TWO.

A. Hosting webinars using the same software
B. Assisting with technology needs and procurement
C. Helping attendees join from non-English-speaking countries
D. Integrating attendance records in a learning management system (LMS)
E. Teaching subject matter experts (SMEs) to train in a virtual environment

18) Considering the challenges of a global marketplace and workforce, which constraints led the talent development professional, key stakeholders, and project sponsor to adopt synchronous learning solutions for the "Seminar World" project? Choose TWO.

A. Prohibitive costs in travel and instructor labor
B. Lack of collaboration between CSRs and operations advisors
C. Need to hire contract producers and/or instructional designers
D. Limited CSR access to in-person training from subject matter experts (SMEs)
E. Desire of field staff for face-to-face interaction with subject matter experts (SMEs)

19) The findings of the needs assessment helped the talent development professional in which of the following areas? Choose THREE.

A. Determining learning format/solution
B. Identifying core topics
C. Managing resources
D. Planning the budget
E. Identifying performance gaps
F. Establishing a vision

20) Which type of evaluation was neglected that may have assisted the talent development professional in knowing if the real root cause was identified, the initiative was properly designed and selected, and the initiative was working? Type your answer in the box below.
<table>
<thead>
<tr>
<th>#</th>
<th>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>B</td>
<td>Which activity is most important for the talent development professional to do prior to making decisions about future similar projects? Choose ONE.</td>
<td>One of the listed lessons learned in the March 9 email is to increase global/cultural awareness of trainers. Answer B, completing a cultural assessment would provide information about the cultural attitudes of the trainers and others with whom they will be working. Answer C, organizational culture audit is related to the culture of the norms of the organization as opposed to global awareness.</td>
<td>2017 ATD Learning System Section 11.1.3 Cultural Assessment Tools</td>
</tr>
<tr>
<td>2</td>
<td>D</td>
<td>Which indicator determined the appropriate learning program for the talent development professional? Choose ONE.</td>
<td>To get good business results from the performance initiative, the TD professional ensures that the project addresses the root cause of the problem rather than just the symptoms of the problem. The Needs Assessment Report (Supporting Document 3) identified several root causes and made recommendations for appropriate learning solutions.</td>
<td>2017 ATD Learning System Section 1.4 Root Cause Analysis and Section 2.5.1 Purpose of Needs Assessment; Section 2.9.1 Selecting Instructional Methods</td>
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<td>3</td>
<td>A</td>
<td>The seven items in the &quot;High-Level Project Schedule and Tasks&quot; listed in “Supporting Document 1: Seminar World Project Treaty” reflect which of the following? Choose ONE.</td>
<td>A milestone is a key point (date) in a project when an event will occur. The High Level project schedule includes both key tasks and their timing which would point to milestones as the correct answer A. Deliverables would be a plausible answer but the high-level list does not include all deliverables.</td>
<td>2017 ATD Learning System page 483, Section 6.11.3.2</td>
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<td>4</td>
<td>A</td>
<td>Which activity did the talent development professional most likely perform to conclude that the complex cases were incomplete or incorrect? Choose ONE.</td>
<td>Once a TD professional has adequately defined the performance gap, the next step is to determine the cause of the gap through gap analysis. The goal is determine why the performance gap exists. To get good business results from the performance initiative, the TD professional ensures that the project addresses the root cause of the problem rather than just the symptoms of the problem.</td>
<td>2017 ATD Learning System page 40, Section 1.4</td>
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<td>5</td>
<td>C</td>
<td>VOXModus's project manager used which of the following as a primary consideration for selecting an appropriate webinar delivery technology to meet the company's objectives? Choose ONE.</td>
<td>Answer C. Availability of IT support for the platform seems to be the strongest answer given that the case materials mentioned &quot;Seminars will be delivered using webinar platforms managed by IT&quot; on supporting document 1. Under Key Issues and Risk Management, &quot;Use one of the existing tools so IT support is available&quot; was cited.</td>
<td>2017 ATD Learning System page 60, Section 6.2.3</td>
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<td>6</td>
<td>A</td>
<td>As a follow-up to the Seminar World project, which of the following would be best for the talent development professional to post on a collaborative site for CSRs? Choose ONE.</td>
<td>Supporting document 1 mentions that &quot;recordings of each webinar will be available for continued access&quot;. Under lessons learned page 10, improve marketing of webinar recordings indicates better access to the recordings would be beneficial.</td>
<td>2017 ATD Learning System Section 3.5.5.3</td>
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<td>7</td>
<td>C</td>
<td>Which of the following may have been a primary factor affecting peer-to-peer interaction and high session attendance rates? Choose ONE.</td>
<td>The factor that may have been a primary factor affecting BOTH peer-to-peer interaction and high attendance rates is cultural norms. Asian countries are typically higher power distance cultures which encourages respect to authority. They are also more collectivist societies which encourages collaboration. Ease of access to technology and promotion of the program might have affected high attendance rates but not peer interaction.</td>
<td>2017 ATD Learning System Section 3.8 Cultural Differences in Learning Preferences and Communication; 4.2.7 Cultural Norms of Learner Populations; Section 11.5 Culture specific differences and similarities; 11.7.2 Learning Attitudes, Preferences and Norms</td>
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<td>8</td>
<td>A</td>
<td>Which option best prepares the CSRs to successfully complete cases? Choose ONE.</td>
<td>Simulations model and represent real situations. They allow the participants to learn by trial and error so they can learn from mistakes in a safe environment. They encourage experimentation in situations that might be too risky in the real world. They provide the opportunity to test alternative scenarios.</td>
<td>2017 ATD Learning System page 220, Section 3.5.7</td>
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<td>9</td>
<td>D</td>
<td>The talent development professional created a budget of $27,450 and secured approval for an allocation of $30,000, generating a surplus of $2,550. Which course of action would be best for using the surplus? Choose ONE.</td>
<td>The budget was for a specific project. All projects require expense tracking and a close out at the end of the project. Any remaining funds are reported to the sponsor for reallocation. Project managers are responsible for identifying, monitoring, and controlling all project costs but would not typically be responsible for allocating surplus funds.</td>
<td>2017 ATD Learning System, Section 6.11.3.3 Project Roles</td>
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<td>10</td>
<td>B</td>
<td>Which of the following participant feedback responses from the December 13 email would be most helpful in determining whether the learning would be used on the job? Choose ONE.</td>
<td>Answer B, &quot;The content was useful&quot; indicates that the learners found value in the content for use in their daily lives. While it doesn't prove that they in fact used it on the job, it's the best choice out of those given. The fact that they would recommend seminars to a colleague could indicate that they enjoyed getting out of the office, not that they plan to use the information on the job.</td>
<td>2017 ATD Learning System, Section 5.1.3</td>
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<td>11</td>
<td>D</td>
<td>Which approach would best capitalize on the evaluations revealing peer-to-peer learning as a key takeaway from the seminars? Choose ONE.</td>
<td>Using the &quot;CSR Best Practices Wiki&quot; provides access to peer knowledge on demand. It is accessible at any day or time. The &quot;chat&quot; feature and &quot;asking peers questions while their customer is on hold&quot; can interrupt other workers as well as all CSRs may not be available when needed.</td>
<td>2017 ATD Learning System page 60, Section 6.2.5.2</td>
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<td>12</td>
<td>AD</td>
<td>Which leadership functions did the talent development professional use when proposing solutions? Choose TWO.</td>
<td>Planning includes setting goals and priorities, developing strategies, and being skilled at timing, sequencing, and organizing. Organizing includes designing a structure to assist in goal accomplishments that human and non-human resources to tasks.</td>
<td>2017 ATD Learning System page 63, Section 6.5.2</td>
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<td>13</td>
<td>ABD</td>
<td>Which additional solutions could have been provided for the greatest impact on results? Choose THREE.</td>
<td>For the root cause of knowledge or skills the best possible solutions include job aids, on-the-job training, and coaching.</td>
<td>2017 ATD Learning System page 3, Section 1.1.2.1, Table 1.1.2.1-2</td>
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<td>14</td>
<td>BC</td>
<td>In which ways are the emails dated December 13 and March 9 examples of effective communication? Choose TWO.</td>
<td>For the TD professional to influence the organization regarding vision and initiatives, they must be able to customize a message. The TD manager must be able to show the strategic value that the TD function provides.</td>
<td>2017 ATD Learning System page 70, Section 6.12.1</td>
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<td>15</td>
<td>AB</td>
<td>Which additional information from &quot;Supporting Document 2: Project Schedule&quot; would help the project manager monitor the project progress? Choose TWO.</td>
<td>Schedule development involves analyzing activity sequences, activity durations, and resource requirements to create the project schedule.</td>
<td>2017 ATD Learning System page 69, Section 6.11.4</td>
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<td>16</td>
<td>AE</td>
<td>In addition to training, which performance improvement options should be considered to best address the increase of calls to operations advisors? Choose TWO.</td>
<td>Performance improvement expands the search for causes of performance gaps beyond training programs such as a lack of appropriate information or missing or inadequate tools or technology.</td>
<td>2017 ATD Learning System page 3, Section 1.1.1.1</td>
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<td>17</td>
<td>AC</td>
<td>Which of the following prior experiences are most important when selecting a candidate for the contract producer role? Choose TWO.</td>
<td>In constructing rationale for using a particular technology, the TD professional must consider accessibility issues including supporting those who speak other languages and the availability of support from IT. The virtual classroom software used in this scenario is a new training approach for the company and some SME's are outside the Asian time zone so there may be some language barriers; hiring a producer that is familiar with the platform and can assist CSRs from non-English speaking countries can provide a better learning experience.</td>
<td>2017 ATD Learning System page 44, Section 4.2.1 and page 60, Section 6.2.27</td>
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<td>18</td>
<td>AD</td>
<td>Considering the challenges of a global marketplace and workforce, which constraints led the talent development professional, key stakeholders, and project sponsor to adopt synchronous learning solutions for the &quot;Seminar World&quot; project? Choose TWO.</td>
<td>In the needs assessment, CSRs reported that classroom training is not always offered and e-learning modules do not always go into the depth that is needed for these multifaceted and changing customer situations. Under proposed solutions, in-person training is cost prohibitive and requires SMEs to be out of their departments for 3 or more weeks. Current in-person training only reaches 11% of regional staff due to travel and schedule constraints. Synchronous virtual learning, if conducted well, will provide the same benefits with more convenience and lower costs.</td>
<td>2017 ATD Learning System page 60, Section 6.2.4.1</td>
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<td>19</td>
<td>ABE</td>
<td>The findings of the needs assessment helped the talent development professional in which of the following areas? Choose THREE.</td>
<td>The needs assessments identifies gaps between the desired and actual knowledge, skills, and performance. The needs assessments enables TD professionals to provide recommendations for the scope, methods, frequency, cost and location of training programs.</td>
<td>2017 ATD Learning System page 20, Section 2.5.11</td>
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<td>20</td>
<td>Short Answer</td>
<td>Which type of evaluation was neglected that may have assisted the talent development professional in knowing if the real root cause was identified, the initiative was properly designed and selected, and the initiative was working? Type your answer in the box below.</td>
<td>The purpose of formative evaluation is to improve the draft training program and increase the likelihood that it will achieve its objectives when it's made available.</td>
<td>2017 ATD Learning System page 51, Section 5.1.5</td>
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