Introduction to Yukon Online Training Final Documentation

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OILS-532: eLearning Course Design

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LEARNER ANALYSIS

Introduction

The e-Learning course I will be designing for OILS-532 is an interactive online training course called "An Introduction to Yukon", that is being created for employees who use an enterprise resource planning (ERP) software application called Yukon.

Project Overview

Yukon was designed specifically for the *electronic distribution industry* and encompasses many business processes. Currently, there are a couple electronic distributors who use it and soon there will be more. Many employees use Yukon on a daily or weekly basis to fulfill their job requirements such as placing orders, quotes, and inputting customer opportunities. Currently the only training provided is through a face to face approach and there is little documentation and follow-up support materials around learning the software. This online training will help onboard new employees and seeks to fill in learner gaps for current employees.

Data Collection

Instrument for Data Collection

The instrument used to conduct the learner analysis and identify learner needs was a 22-question survey created at SurveyMonkey.com. The survey consisted of 10 open-ended, 2 close-ended, 7 multiple choice and 3 ranking questions. Initially, I sent the survey to 27 internal employees at 2 different companies and asked them to forward the survey to anyone who uses Yukon. 39 respondents completed the survey and it took 8 minutes on average to complete.

General Findings

The survey results showed a mix of prior knowledge and experience with using Yukon as well as employment duration. For example, there were close to the same number of participants

who have worked for the company and have used Yukon for 10 or more years as there were

employees who are newer and have only used it for a duration of 3 months to 3 years.

Figure 1

Years of Experience with Yukon
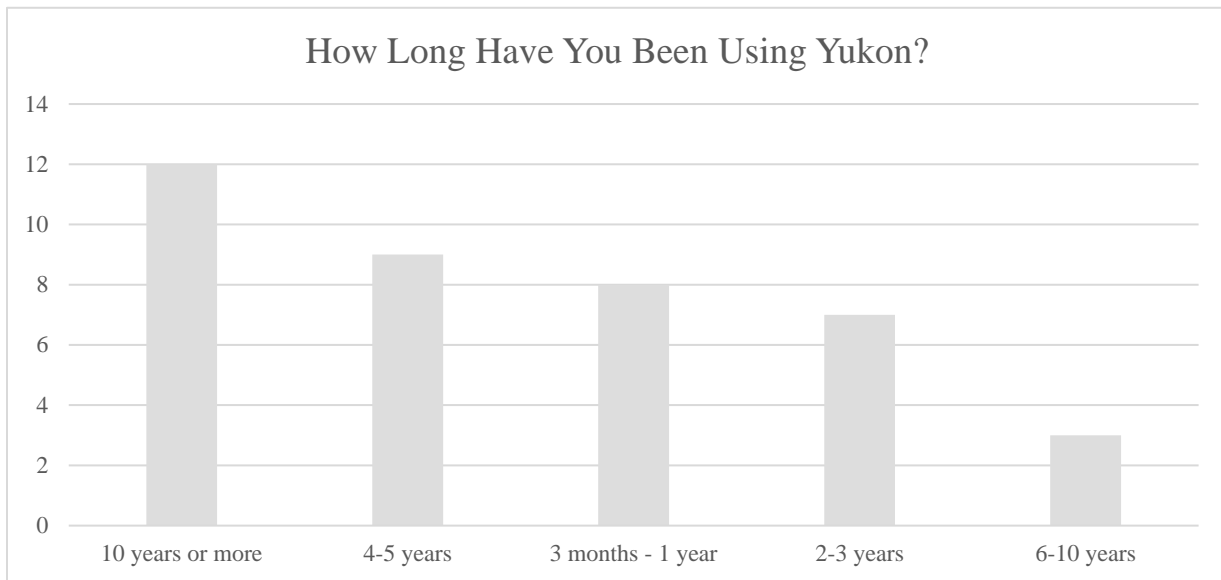
Learner Roles

The survey helped to identify 5 primary Yukon users for the online training. These

consist of *manager*, *inside sales representative*, *field sales representative*, *high-level decision

maker*, and *other*. To verify the user roles, I conducted a phone interview with a chief sales

officer who confirmed these findings and provided additional insights into role descriptions.

Managers

Manager consists of 2 main categories and they use Yukon daily. *Product* manager

responsibilities include consulting, product design, vendor and customer relations, marketing,

budgeting, inventory, and opportunity management. *Asset* managers are responsible for

purchasing, pricing, quoting, scheduling, sales support, vendor relationship maintenance, and

opportunity recognition. 11 out of 39 respondents were managers.

Inside Sales Representatives (ISR's)

ISR's use Yukon everyday as a primary part of their job tasks. This role stays at their desk and interacts with internal employees and customers via phone and email. ISR's are responsible for making the order happen and work in the transactions related to existing opportunities. 19 out of 39 respondents were ISR's.

Field Sales Representatives (FRS's)

The FSR job requires face-to-face interaction and phone and email communications with customers, ISR's and managers. FSR's work with engineers and find new sales opportunities. FSR's use Yukon when they are not traveling to meet clients and want to check on products and orders. 4 out of the 39 respondents were FSR's.

High-Level Decision Maker

The high-level decision maker is responsible to lead, manage, and hold accountable. Job titles consist of chief executive officer (CEO), chief sales officer (CSO), chief information officer (CIO), chief operating officer (COO), vice president (VP), vice president of marketing, director, and director of engineering. This role uses Yukon daily or weekly depending on their schedule. 4 out of 39 respondents were high-level decision makers.

Other

Other consists of a secondary learner that is not as prevalent within the company. This role can vary in familiarity and use of Yukon ranging from expert to novice. An example of this user would be database analyst / report writer and web marketing. 1 out of 39 respondents were in the other category.

Figure 2

User Roles

Yukon Learner / User Roles

Bar chart showing user role counts: Inside Sales Representative 19, Asset Manager 6, Product Manager 5, Field Sales Representative 4, High-level Decision Maker 4, Other 1.
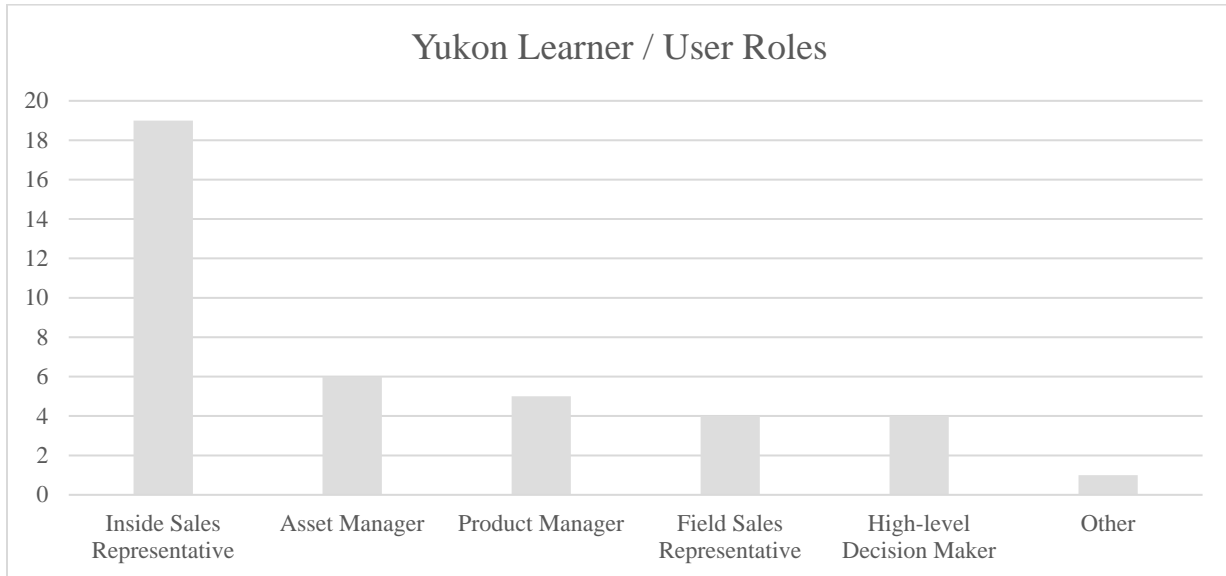
Learner Tasks

In the survey I asked 2 open-ended questions pertaining to the main tasks' learners currently perform in Yukon and followed up with asking what tasks they would like more training on. These questions helped to identify prior-knowledge and learning gaps.

Figure 3

Top Yukon Tasks

Current Top Yukon Tasks

Bar chart showing current top Yukon tasks: Quotes 37, Orders 28, Data / Inventory… 16, Product… 15, Opportunities 9, Historical… 6, Accounting 3, Reports 2.
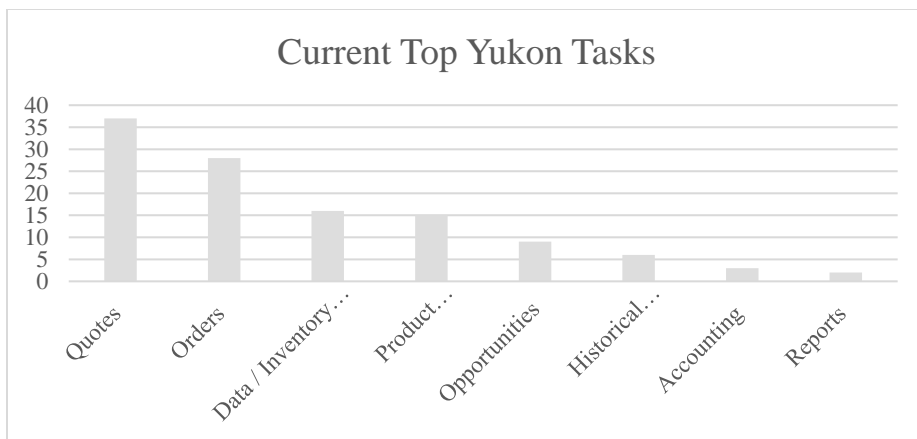
This information will be used in the design brief when structuring the course outline and

in constructing a task analysis for content creation. From the respondent answers, I chunked the

tasks into 8 main categories and in the order of what respondents use the most in Yukon, these

are Quotes, Orders, Data / Inventory Management, Product Information, Opportunities,

Historical Information, Accounting, and Reports.

Learning Gaps

Learners provided details on what they wanted to learn more of within Yukon. The

information fell under the 8 main categories previously listed with an additional category of

other and are indicated in Table 1 below.

Table 1

Yukon Concepts Learners Want to Know

Other	Quotes	Orders
ISR Process	Finding a Customer Quote	How to Find an Order
Sales Funnell Management	Large Quotes	RMA Process (5)
Pick Process	Correct Format	Allocating Parts (3)
Warehouse Process		Correct Format
		Consignment Entry (8)
		Returns (2)
		Supplier Orders
		Line Item Matching Customers
		Shipping
		Adding and Changing Line Item Numbers (Quickest way)
		Supplier Orders Via EDI
		Order Entry

Opportunities	Historical Information	Data / Inventory Management
6 Votes	Forecasting	Tools
	Maintenance of Reserves	Replenishment
		Reserve Orders (3)
		Safety Stock Analysis
		Mass Updating
		Special Pricing Info with DW Pricing
		Replenishment Page (2)
		Related Products

		Buying

Product Information	Reports	Accounting
Checking Inventory	Functionality	Ramifications
Finding Info	Generation	Transfers
Tracking Info	Specific Data	Ship and Debits (2)
Inventory Availability (2)	General Reporting Options (2)	General Capabilities
	When to Use Yukon vs BI	Invoice Matching
	Monthly Performance Goals	

Learner Preferences:

Preferred Time and Technology

Most respondents thought that an online training for Yukon would be slightly to significantly helpful and would prefer to devote 1 hour or less a week to learning activities. They would like to complete the training during work hours when it adheres to their schedules and a desktop computer will be the primary tool used to access the training.

Preferred Style

Most respondents state they have taken online training in the past and prefer either asynchronous or a mixture of both synchronous and asynchronous learning. Most learners stated they preferred a mixture of solitary and collaborative learning activities.

Figure 4
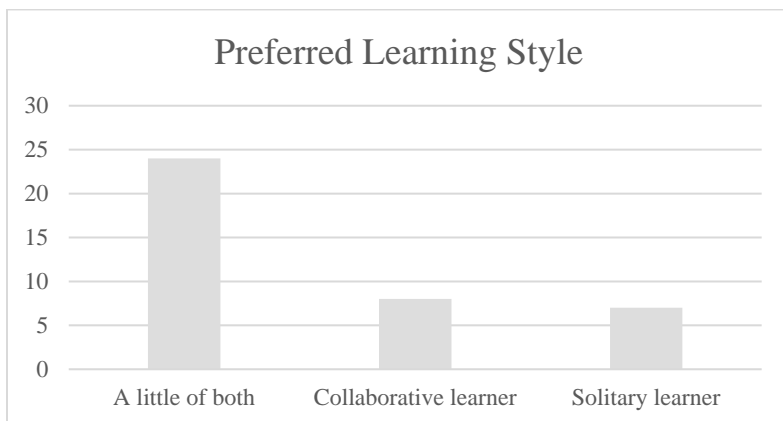
Positive Learning Experiences

When asking respondents to share positive past learning experiences some of the emerging trends focused on hands on training, use of real examples using different scenarios, clear step-by-step instructions, graphics and reference materials, real-time screen sharing, knowledge checks, group input, and learner support as shown in Figure 5 below.

Figure 5

Emerging Trends for Preferred Learning Activities
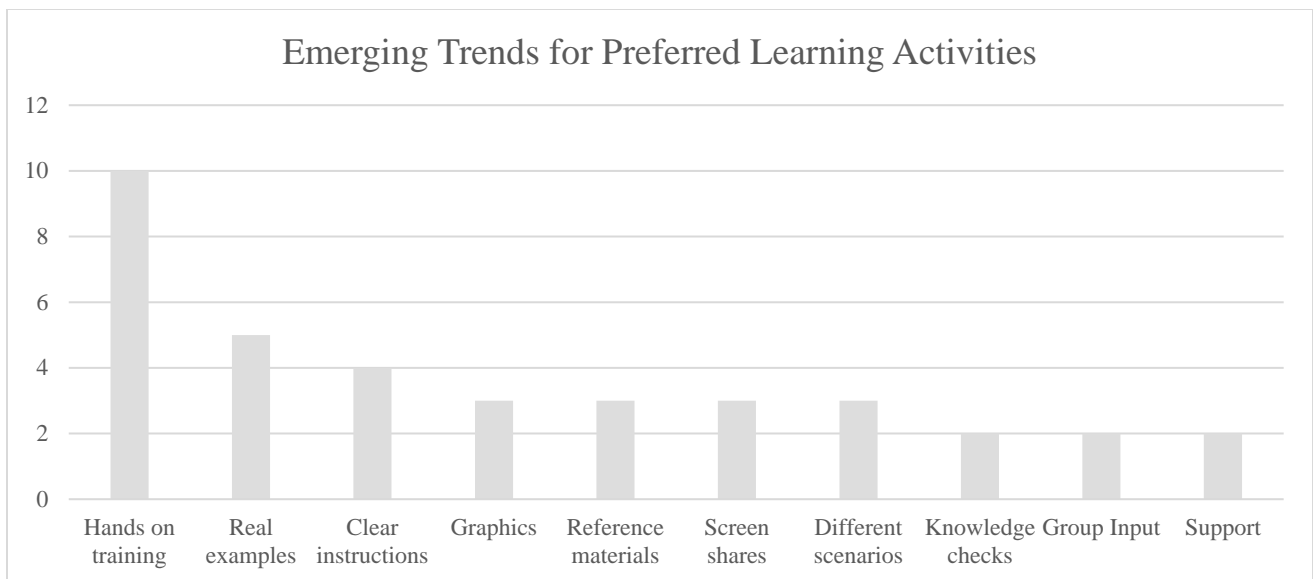
Learner Dislikes

When surveyed on what made an unsuccessful learning experience some of the feedback included too long, information overload, lack of interactivity, poor documentation, feeling like a number, questions not answered, lack of support, too much note taking, and using only one format.

Recommendations

Some respondents provided additional comments to consider when designing an online training for Yukon. Some of these were, include training on all the processes involved from

order to shipment, to picking, be mindful of working schedules and time constraints, and provide follow-up working sessions for those that need more training.

Survey Results

To view the complete survey results please reference Appendix A.

DESIGN DOCUMENT

Instructional Problem and Need for Course

LogisticsFlow a software company will be licensing an enterprise resource planning software (ERP) program called Yukon in which they have designed specifically for companies in the electronic distribution industry. Currently, there are two medium-sized companies that use Yukon and a new company ready to onboard in July of 2020.

Over the past 15 years the training for the software has been conducted in a "learn as you go" approach and primarily performed face-to-face by an employee with a similar job role. The ERP software has evolved over a decade and there has been minimal formal training created or follow-up support provided other than employees who have used Yukon for some time and take a leadership or mentor role.

Training Content

The content produced for this eLearning course design will be provided in an interactive online training built in Moodle Cloud that is asynchronous, employs the use of socio-cultural, constructivism, and cognitivist learning theories, includes 10 learning modules, and requires a minimum of 1-3 hours a week for 2 in a half months or up to 20 hours of training content.

The content will concentrate on an introduction to the software's capabilities focusing on 8 main categories of application use with scaffolding principles applied that intend to build in more advanced concepts and provide additional tips and tricks.

After reviewing the learner analysis and speaking with a couple subject matter experts (SME's), the main modules will be presented on the following topics and sequenced in this order: 1) Training Overview 2) Historical Information 3) Product Information 4) Quotes 5) Opportunities 6) Orders 7) Data and Inventory Management 8) Reporting 9) Yukon Tips and Tricks and 10) Final Assessment.

Target Audience (Experience and Accessibility)

After surveying 39 Yukon users from two companies, the primary job roles of those that would take this training are: a) Inside Sales Representatives (ISRs) as this job requires constant use of Yukon, b) Asset and Product Managers who are in Yukon daily, and c) Field Sales Representatives (FSRs) who are in Yukon daily to weekly.

The audience will be able to access the online training from their desktop or laptop work computers over the company's internal network, so there should be no reason they can't access the training.

For the initial launch of this course, there will be mixed levels of prior knowledge with Yukon ranging from a super-user (someone who has used the program for more then 10 years), to an intermediate/advanced user (someone who has used the program for 5-10 years), and a beginning user (someone who was never used the program with up to 5 years of experience).

After the initial launch future iterations will include mostly beginning users such as new hires, onboarding a new companies' employees, and beginning to intermediate users that want to continue to improve their skills. Intermediate, advanced, and super-users will be asked if they would like to participate as e-mentors or facilitators within the training and could possibly be provided a monetary incentive for doing so depending on company guidelines.

Subject Matter Experts

The first subject matter expert I consulted with was an advanced Yukon user of 7 years who is an Asset Manager and has been available for three phone interviews, provided numerous documents such as a 70 page ISR training manual in Microsoft Word format, and made it possible to record two Skype presentations from a live face-to-face office training she conducted one titled "A Day in the Life of an Asset Manager" and another one centered on "Open Orders and Backlogs" .

The second SME I consulted with was a high-level decision maker whose title is Chief Sales Officer (CSO) and who is also an advanced user of 8 years. He was able to provide additional information over 2 Skype meetings such as, a 28 page FSR sales funnel management training manual in pdf format, a company accountability chart presented in an 11 slide PowerPoint file, and further expounded on what an "Opportunity" entailed.

Stakeholders

The primary stakeholders for this online training will have the final sign-off regarding deliverable content and employee training terms. Communication on the progress of this project is expressed via a weekly Skype meeting and followed up by posting the analysis documents to a JIRA help ticket for additional feedback.

The primary stakeholders include a Chief Information Officer (CIO) who has been an integral part of building Yukon from the ground up over the past 15 years, a Chief Executive Officer (CEO) who takes an active role in signing on new companies, and a Director of Marketing who provides additional input on the project.

The secondary stakeholders help as SME's as well as entail 4 super-users comprising of an experienced ISR, FSR, asset and sales manager who may act as e-mentors and facilitators within the online training once it begins.

Training Objectives

The training objectives are established on an overall training level as well as set per each module. The overall learning objectives for this online training are:

1. Recognize the different types of Yukon tasks that support various processes within the electronic distribution sales channel.

2. Apply basic Yukon operating procedures when accessing historical and product information, dealing with quotes, opportunities, and orders.

3. Evaluate and state the best way to handle a given customer scenario by relating it back to the module information provided.

4. Express and discuss learning gaps or concerns pertaining to each module.

5. Recall information in a self-knowledge check at the end of each module.

6. Identify and use Yukon resources and support material for future use.

Training Course Outline

The online training course outline will be structured as follows:

1) Module 1: Training Overview

    a) 5-Question Pre-Training Survey

    b) Training Expectations and Duration

    c) Overall Training Objectives

    d) Links and Resources

    e) Support

    f) Learner Introduction Discussion Board

2) Module 2: Historical Information

    a) Module Introduction and Objectives

    b) Daily Activity

    c) Search for Existing Customer

    d) Customer Activity Page

    e) Find Transaction

    f) Editing a Customer Profile

    g) Forecasting

    h) Discussion Board

    i) Knowledge Check

3) Module 3: Product Information

    a) Module Introduction and Objectives

    b) Product Information Tab

    c) Related Products Tab

    d) Product Activity Screen

    e) Part Number Search

    f) Sales Notes

    g) Filters

    h) Design Registrations

    i) Discussion Board

    j) Self-Knowledge Check

4) Module 4: Quotes

    a) Module Introduction and Objectives

    b) Open Inquiries and Turning an Inquiry into a Quote

    c) Generating the Quote

    d) Send Supplier Request

    e) Supplier Notes

      f)   Alerts

      g)   Discussion Board

      h)   Self-Knowledge Check

5) Module 5: Opportunities

      a)   Module Introduction and Objectives

      b)   Opportunity Goals

      c)   Understanding the Process (Funnel View)

      d)   Opportunity Field Definitions

      e)   Customer Opportunity Screen

      f)   Yukon Tabs Used for Opportunities

      g)   Managing Daily Workflows Using Yukon Opportunity Views

      h)   Internal Communication

      i)   Creating a Reserve

      j)   Discussion Board

      k)   Self-Knowledge Check

6) Module 6: Orders

      a)   Module Introduction and Objectives

      b)   Entering a New Customer and Ship to Information

      c)   Creating a Sales Order from a Quote

      d)   Processing a Web Sales Order

      e)   Creating a Sales Order from a Reserve

      f)   Sample Orders

      g)   Expedites

      h)   Open Sales Orders / Back Log

      i)   Export Restricted Orders

      j)   Advanced Allocation Window

      k)   Note to Customer and Customer Emails

      l)   Non-cancellable and Non-returnable (NCNR) Process

m) Customer Returns (RMA's)

n) Payment Terms

o) Handling Purchase Orders

p) Credit Card (CC) Orders and CC Authorization Form

q) Customer Tax Resale Certificates

r) Discussion Board

s) Self-Knowledge Check

7) Module 7: Data and Inventory Management

a) Module Introduction and Objectives

b) New Manufacturer / Supplier

c) New Parts

d) Price Loads

e) Data Sheets

f) Specifications

g) Mass Upload Requests

h) Discussion Board

i) Self-Knowledge Check

8) Module 8: Reporting

a) Module Introduction and Objectives

b) How to Access Reporting

c) Report Types and Formats

d) Running and Scheduling a Report

e) Custom Reports

f) Discussion Board

g) Self-Knowledge Check

9) Module 9: Yukon Tips and Tricks

a) Action Quick Buttons

b) Acronyms

c) Opportunity Field Definitions

d) Filters

e) New Functionality

10) Module 10: Final Assessment

    a) Conclusion

    b) Additional Resources and Support

    c) Summative 10-Question Graded Quiz

    d) 5-Question Post-Course Survey

Online Training Course Flowchart

Figure 6 below illustrates the 10-course module flow as linear in nature as the learner can advance through each module by contributing to the discussion board prompts and then by completing the short 5-question self-knowledge check quiz at the end of each module.

Figure 6

Online Training Flowchart
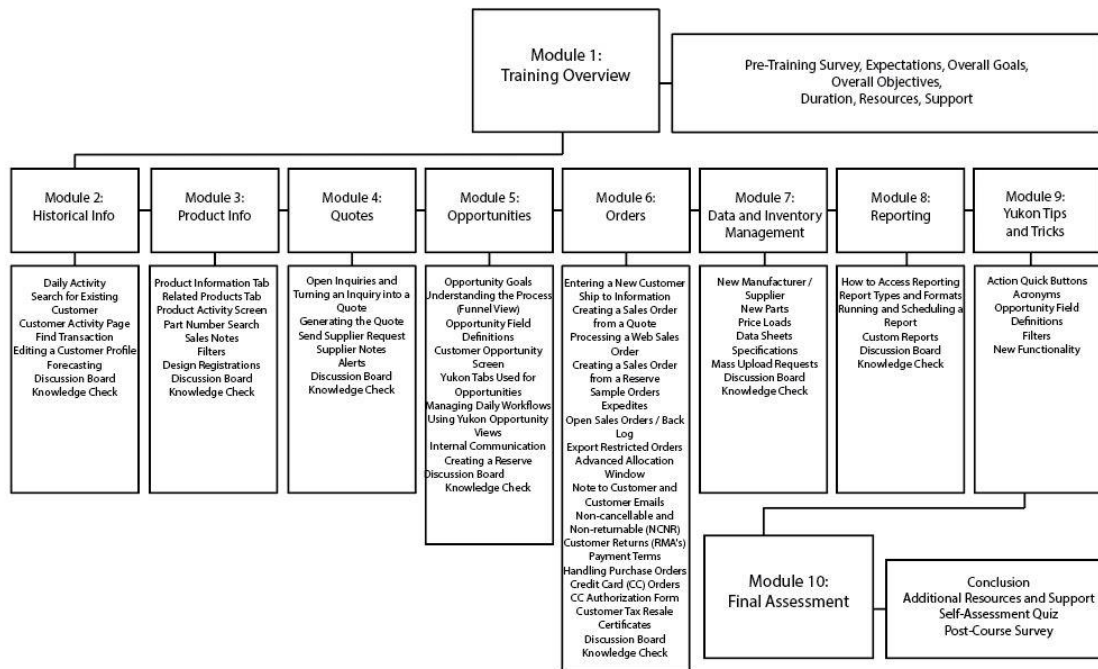
Social Presence and Learning Strategies

Social Presence

Social presence will be addressed throughout the course training. It will first be established through learner introductions found in Module 1, where learners will be asked to answer 3 short questions and read and respond to another individual.

Facilitators and e-mentors will display social presence throughout the course by showing an immediacy with responses to questions asked and through feedback and praise within the module discussions.

A sense of community will be formed by a learner sharing their reflections and experiences relating to the material as well as through responding to others.

Social-Cultural and Constructivism Learning Strategies

Learners can relate the course material to their own job roles by reviewing the content and building upon their current knowledge and experience. They will have the opportunity to respond to open-ended discussion prompts and interact with the community of practice (CoP). Through the online discussion's learners can relate, reflect, and respond to similarities and differences regarding how they would apply their learning and prior knowledge.

The facilitators and e-mentors will help engage a community of inquiry (CoI) enabling learners to form an individual understanding of the information through a social-cultural and collaborative context.

Cognitivist Learning Strategies

Cognitive learning strategies will be employed to help learners think critically about how they will use the materials within their daily job requirements. Cognitive discussion prompts based on a specific scenario will allow learners to think about and describe the steps required

within the software to produce a particular outcome. Further cognitive processing of the

information will take place within the self-knowledge checks and summative 10-question quiz.

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Evaluation and Assessment

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Formative Evaluation

The training will include formative evaluation as it will start with a short 5-question pre-

course survey that will help the facilitator gage a learner's experience level with Yukon.

Formative evaluation will be applied within each module via an interactive discussion board so

the facilitator and e-mentors can assess and address any additional questions the learners may

have. A short 5-question self-knowledge check quiz will be re-occurring and conclude each

module as an individual's reinforcement of concepts learned. The self-knowledge check can be

taken as many times until a score of 100% has been achieved, although it's not necessary to

complete 100% to move to the next module.

Summative Evaluation

A summative evaluation will be applied at the very end of the training through a 10-

question quiz covering all the training information and a 5-question post-course survey. These

final assessments will show both the facilitator and learner the comparison about changes in

confidence level and the amount of knowledge transfer gained with using Yukon.

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Learner Support and Resources

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Learning Facilitation

Learning facilitation will be initiated through the introduction sections of each module

and will include detailed learning objectives and a sequence of material with correlating

discussion activities. There will be a brief orientation provided in the course introduction that

highlights the general layout and duration of the course.

Communication Support and Feedback

Communication support and feedback within the training will primarily be conducted via email directed to the course facilitator and e-mentors and through the discussion boards where a reflection of the learning will occur. Feedback will be provided from the facilitator, e-mentors, and trainees within the discussion boards to help facilitate a CoI and provide artifacts of learning. The training will utilize a pre and post survey for additional feedback instruments.

Links and Resources

There will be a links and resources section for downloading any associated training materials such as pdfs, word documents, presentations, and mp4 videos. This section will include a basic FAQ that will help eliminate preliminary questions that could arise. A dedicated discussion forum will be included specifically to address learner questions and can be accessed throughout the duration of the training. A short video walk-through on using Moodle Cloud from the viewpoint of a learner will be included as supplemental information. This section will also include a link to an online knowledge base built in JIRA/Confluence that includes company help articles and tutorials that an employee can access through a keyword search.

E-mentors and Facilitators

E-mentors and facilitators are going to be prominent within this training. There will be one primary facilitator and 2 e-mentors that will help start and guide discussions as well as answer questions that may arise. The trainees or co-workers within the company are considered peers and community experts are co-workers who've had more experience with Yukon software.

Technical Support

Within the training course, the instructional designer and company IT personnel will be

the primary technical support and there will be an email listed for learners to send IT requests to with an estimated response time.

Links to Databases

After the first version of the course, in the future when more time and resources are allocated, it may be beneficial to set-up a test database for using Yukon software with test company data and an assigned test UN and PW that can be given to participants for a role-play scenario.

Registration and Enrollment

The registration and enrollment for this training will be distributed company-wide for anyone who wants to learn more about the software application called Yukon. However, this training will be required for all new and beginning users.

Policies

There will be a policy noted within the course regarding netiquette and best practices for posting and responding to others.

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LMS Platform and Media

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The online training course will be built using the free version of Moodle Cloud and can support up to 50 users with a max of 200mb file storage. Each module will include a video demo of the concepts covered, a downloadable pdf document that displays static images and written instructions for the concepts and procedures presented, an interactive discussion board, and a quiz for the self-knowledge check.

Future courses may require an upgrade to Moodle Clouds Mini package which offers additional features for $250 a year and includes custom certificates, web conferencing, automated backups, a document converter, and an extra plugin pack.

Development, Implementation, and Maintenance of Course

Content Creation

The initial course will be developed and implemented into Moodle Cloud by the instructional designer. SME's will be utilized when creating video walk-throughs for each module and when establishing authentic scenario discussion board prompts.

Iterations and Improvements

During course development there will be two scheduled pilot tests that will allow for slight modifications before the first launch.

Future iterations and improvements to the course will be based on post-course survey information and artifacts collected within the discussion boards.

Maintenance of the course will be upkept with help from the instructional designer(s) and primary and secondary stakeholders.

Timeline for Developing and Implementing the Course

Online course development will begin on March 30, 2020 and 1 module per week will be produced and implemented into Moodle Cloud, putting the completion date for the first iteration around July 6, 2020. Table 2 below illustrates the timeline for development and implementation.

Table 2

Development / Implementation Dates	Description
Mon 03-30-20 to Wed 04-08-20	Module 1
Thurs 04-09-20 to Mon 04-20-20	Module 2
Mon 04-21-20 to Thurs 04-23-20	Pilot Testing for Module 1 and 2
Fri 04-24-20 to Fri 05-01-20	Module 3
Mon 05-04-20 to Fri 05-08-20	Module 4
Mon 05-11-20 to Fri 05-15-20	Module 5
Mon 05-18-20 to Fri 05-22-20	Module 6

Mon 05-25-20 to Fri 05-29-20		Module 7
Mon 06-1-20 to Fri 06-5-20		Module 8
Mon 06-8-20 to Fri 06-12-20		Module 9
Mon 06-15-20 to Fri 06-19-20		Module 10
Mon 06-22-20 to Fri 06-26-20		Pilot Testing for Modules 3-10
Mon 06-29-20 to Fri 07-03-20		Modifications to Modules from Pilot Tests
07-06-20		Launch Iteration 1

USABILITY TESTING FEEDBACK

Prototype Introduction

There were two users who tested the prototype for An Introduction to Yukon Online Training built in Moodle Cloud. Each of the pilot testers was provided instructions with how to login and start the course. They were sent an email with the course URL: https://yukonisd.moodlecloud.com/, the username being "testuser" and the password being "testuseryukonisd2020!". The primary questions asked of the pilot-testers were:

1) What did you find that worked well?

2) What could be improved upon?

3) What wasn't clear or what was confusing?

Pilot Tester 1

The first pilot tester was an undergraduate college student in his early 20's. He is accustomed to using the Canvas learning management system through his university. The equipment he tested the prototype on was a Microsoft Surface Pro 6 using the Chrome browser and was connected to high-speed internet.

Upon logging in he was perplexed by the default dashboard and didn't know how to utilize the unpopulated modules titled Private files, Online users, Latest badges, Calendar, and Upcoming events, primarily because they had no content in them.

Upon clicking on the main image and entering the course, he was not sure where the central dashboard links disappeared to. He felt it was unclear that the small hamburger style show/hide menu located on the top left of the browser toggled the course menu and did not know it was used as the primary navigation throughout.

Since this tester is accustomed to the tabbed layout of Canvas, he would have preferred the "General" hyperlink to say "Modules", would like a section for all discussion forums titled "Discussions", and a section titled "Assignments". This pilot tester prefers the main navigation hyperlinks to be displayed at the top of the course preferably as a tabbed navigation, rather than on the left side using a show/hide toggle.

Pilot Tester 1 did like the linear progression of the modules and content and found it easy to understand the course flow. He commented that the linear flow helped in setting his expectations of what was to come next as he could quickly glance ahead. He thought the "General Training Questions" discussion topic button was straightforward to use and that the "Jump To" navigation located at the bottom in each module worked nicely.

Pilot-Tester 2

The second pilot tester was a woman in her early 70's who is not accustomed to online learning and doesn't own a laptop or have access to internet. She tested the course on her mobile phone which was an Apple iPhone 6 Plus and utilized her cell phone's data plan.

This tester ran through Module 1 and found the objectives, timeframe, expectations, format, support, and contact information to be very clear. She liked being provided with a Q&A section and information on how to use the general discussion forum. She appreciated the interactivity of the introduction discussion and liked that responses were optional.

This tester felt the transition from the first module to the second was good, because the

mountain graphics unified the start of a new module and that continuity was found throughout each section with the attention to the advancing hyperlinks located at the bottom.

There were some limitations testing on a mobile device with lack of high-speed internet such as in certain instances the videos took a while to load and the software graphics represented in the videos were too small to see. Although, she thought the audio level of the videos was good and opted to listen instead. Since the video did not work as well through mobile, she liked the added pdf information sheets provided.

This pilot tester was distracted several times by the trainer in the video as some of the scripts seemed unrehearsed and the vocal tone was inconsistent. Examples of this were the instances of repeating the word um, speed fluctuations when narrating, a lack of confidence such as admitting to not knowing certain acronyms, and using acronyms not known by the pilot tester. Pilot Tester 2 would have preferred a better rehearsed or scripted video that presented a consistent and smoother approach.

This tester appreciated the self-knowledge check at the end and felt it was a good reinforcement of the material covered.

Instructional Design Considerations

Given the feedback provided by the two pilot-testers some modifications can be made to the prototype. Modifications include providing a pdf instruction sheet for users to read before they login to the course. Another addition is to provide a simple walk-through video in Module 1: Training Overview that explains the primary course navigation and dashboard customization options.

Another consideration is updating the pdf overviews to correlate with the videos and essentially be a printed version of the video for the learners who cannot access it or prefer to

print and take notes. It is important that the video narrator has a planned script for each module

so that all content is unified and can be easily understood by the learners. Another idea is to use a

highlighted mouse in the videos and enlarge sections of the software screen that are focal points

for the training as this will help make it easier for learners to read and follow.

COLLABORATIVE PROBLEM-SOLVING ACTIVITY

Description and Topic for Collaborative Activity

The collaborative activity will be added to "Module 6: Orders" and have three people

assigned to a group by the lead facilitator. This activity will provide a specific customer scenario

and each member of the group will be assigned a role that handles a part of the sales process.

How will roles be determined and assigned?

The assigned roles will be, Asset Manager (AM), Field Sales Representative (FSR), and

Inside Sales Representative (ISR). The groups of 3 will be notified via email from the training

facilitator on who their correlating group members are.

How will you build readiness for the activity?

By module 6, the learners have already established a sense of community through the

discussion boards and should have a foundation of prior knowledge to work from regarding

Customer Activity, Quotes, Opportunities, and Orders.

What type of directions will you give?

There will be a problem-based learning challenge section in this module that has the

detailed instructions included on the section screen by explaining in written format the scenario

for the activity and includes a PowerPoint (PP) template that categorizes topics to address for

each of the 3 roles.

How will the solution to the problem be presented?

The PP template will include prompts for each sales member to answer and will ask for the steps and communication processes they took to process the order as well as indicate any roadblocks they had to consider and work together on. One of the group members will post the final PP to the class discussion board for other learners to view and respond to.

How will the learning process occur?

The problem-based scenario will center around a made-up customer with certain order requirements. The instructional designer will work with a SME to define the activities narrative in greater detail so that it's close to a real-world scenario.

To give a brief example, the activity will center around a "new customer" in which the FSR acquired a lead from during a face-to-face sales meeting. The FSR will pass the lead over to the ISR to start processing and who will then communicate with the AM. The AM will connect with the manufacturer of the part and will continue to work with the ISR who communicates back to the FSR until the order has been finalized.

The new customer will be a large defense, aerospace, and security company located in North America, who wants to order an abundant quantity of products (for example, a GaN 600W S-Band Radar Devices, a Low-Noise Amplifier, and a Bluetooth Low Power Energy Module) that are supplied from different manufacturers (meaning there could be different protocols for each part/manufacturer) for production of a large qty of end products.

What guidelines should be provided for engaging in the collaborative problem-solving

process?

The sales team which includes the 3 roles of FSR, ISR, and AM will need to work together to describe their actions, Yukon processes, and questions throughout this customer order by including their notes within the PP template sections.

The group will address how they worked and communicated together to input the new customer into the system, how they went about creating the order, and what considerations, questions, limitations, and roadblocks they might encounter with a product specification list of this kind.

How will participants synthesize and reflect on the learning experience?

The significance of this activity will help learners to reflect on Yukon system concepts such as working as a group, entering a new customer, creating an opportunity in the system, adhering to export restriction guidelines, qualifying the project (example, some vendors will not sell products for weapons of mass destruction), entering and customizing a new part number into the system, minimum order quantities (MOQs), non-returnable and non-cancelable policies NCNR), tariffs, payment type and terms, shipping, adding customer / project notes, finalizing the order, and order confirmation.

How will you facilitate learning and provide closure to the activity?

After the collaborative artifact has been posted by the group to the discussion board, the lead facilitator will collate one PP with all the information, remove redundancies, and expound on any other considerations overlooked. Then the final PP will be shared with the group and final thoughts can be provided within the discussion between all groups.

How will you evaluate the process and product?

The content provided by each group will be a good indicator on how well they understand the concepts presented throughout the training up until this point. This will also help the facilitator to provide additional details and insights not addressed by any of the groups. The final PP will be an artifact of the collaborative activity and can be kept by participants for future reference.

TRAINER DEVELOPMENT PLAN

How will you orient the training facilitators to distance learning?

Before the 2-month training begins, the lead facilitator and 3 e-mentors will be asked to join 5 one hour working sessions over a Skype meeting during a one-week period to review the online training with the instructional designer. The facilitator and e-mentors are advanced to super-users of the Yukon software, and they each comprise a different job role within the company (example: Lead Sales Manager, Asset Manager, Inside Sales Rep, and Field Sales Rep), and they have been employed with the company for over 5 years.

The instructional designer will cover the 10 training modules throughout the 5 working sessions and provide a tip checklist in pdf format at the end of the sessions to help reinforce good mentor practices with respects to building a community of inquiry and helping to facilitate learning transfer. The sessions will also provide a place for real-time feedback and questions.

During the 2 pilot testing periods prior to implementation and training, these same personnel had the opportunity to review the modules and overall course design, may have helped with some of the material, and had the chance to provide feedback.

What characteristics make a good distance facilitator and how can mentoring be

used to enhance the learning and collaborative experience?

The characteristics of a good distance facilitator for this online training course are primarily through providing learner support in a timely manner and by providing thoughtful feedback within the discussion forums. This will help to build a CoI and community of practice (CoP) by fostering a learner-centered approach where participants views are valued, and they can share and discover new knowledge through the guided activities. Helping to keep up learner motivation and incentives are also very important within this training. This can be done by establishing social presence in the discussion activities and by sending out course message reminders to help keep learners on track.

What should be covered in a faculty development program?

Some of things that should be covered in a faculty development program are release time, faculty training, copyright of course, intellectual property, and policies of the company that will impact distance delivery.

What kind of incentives should be provided?

The company is ultimately responsible for incentives. Suggested incentives include money provided in a personal professional development account or as a trainee stipend.

FINAL COURSE EVALUATION PLAN

Stakeholders

The primary stakeholders for this evaluation are managers who are responsible for training new employees with using the Yukon ERP software and high-level decision makers from LogisticsFlow, the company responsible for creating new software developments and licensing the software to interested electronic distribution companies.

Focusing the Evaluation

After the initial course has been launched and completed the stakeholders would like to find answers to questions in a few areas. The first question addresses the effectiveness of employee onboarding and job performance. It asks, does the training provide a good understanding of the basic software capabilities to perform daily job tasks? The second question encompasses the effectiveness of course materials, usability, and motivation. It asks, are the training materials helpful and easy to understand, access, download, use, and are they provided in the best formats for leaner needs and accessibility? The third question is focused on the facilitators experience and asks, do the facilitators of the training have a good idea on how to best fulfill their position and provide optimal learner support? This question addresses learning experience, quality of knowledge transfer, and learner and facilitator motivation.

Key Questions

The evaluation will focus on two key questions that are the pillars of the evaluation focus. The first one being, is this an effective online training course to teach Yukon software concepts? The second question is, how can this training be improved for future iterations?

Models of Evaluation

Currently, the online course includes a formative and summative survey provided to learners at the beginning and the end of the course. Artifacts from the course discussion boards, general course comments, and outcomes from the collaborative exercise can be used to look for emerging themes and discover where information is lacking, confusing, or frustrating learners.

After concluding the first course a working session will be held with stakeholders and facilitators to address the facilitator needs and observations. This session will seek to obtain facilitator feedback and discuss how the course could be improved from their viewpoint.

To gain additional learner insight, the instructional designer will ask a couple learners if they would be amenable to a follow-up interview about their experience with the course.

Collecting the Information

The information will be collected through online learner survey's, facilitator observations, learner self-knowledge check quiz results, testimonials provided in learner interviews and facilitator working sessions, as well as from the analytic data within the learning management system. Snowball sampling will be used when determining learner interviews.

Analyzing the Data

The key questions will primarily focus on qualitative evaluation of the data. This will take more time since the content needs to be read, categorized, coded and emerging themes interpreted. The quantitative data will focus on the number of learners, weekly activity within the course, and duration of learner sessions.

Results

The results of the course evaluation will be provided to stakeholders in a one-hour presentation followed by questions and answers. The presentation will include evaluation findings addressing course quality alongside representative graphics, charts, and recommendations for future revisions.

PERSONAL DESIGN FRAMEWORK

Introduction

My name is Krista Rundiks and I've been a professional web and graphic designer for 15 years working for small to medium sized companies. I became aware of instructional design when I was looking for design jobs and realized this was a completely different sector of design. I enrolled for the Master of Arts program at The University of New Mexico where I'm currently obtaining a degree in Instructional Design and Technology and hope to graduate at the end of the Fall 2020 semester.

A lot of people ask me, what is instructional design and what does an instructional designer do? In summary an instructional designer analyzes a learning problem through a multitude of evaluation techniques and determines the most effective learning theories, the technology and applications used, and constructs the sequencing of content that will best facilitate knowledge transfer. Instructional designers work closely with primary, secondary, and tertiary stakeholders which most typically include clients, learners, and subject matter experts (SME's) in creating a product that evolves through an iterative process such as ADDIE or SAM.

Preferred Learning Theories

As an instructional designer, I base my design on the research gathered in the analysis phase of a project to best meet the client and learner needs. This analysis further helps me to assess topics such as prior knowledge, learning gaps, cultural sensitivities, learner motivations, access to technology, accessibility, and organization policies.

As an adult learner and designer, I resonate the most with the constructivism, cognitivism, and humanism. I feel that a good eLearning design encompasses a multitude of strategies. Through my experience I've found the most important components to promote an

effective online learning experience are when a course is learner-centered, culturally inclusive, scaffolded, incorporates collaborative activities through a community of inquiry (CoI), encourages a community of practice (CoP), provides opportunities for reading, reflection, and response, uses situated learning, integrates learner support, emphasizes social presence, is flexible, allows for learner feedback, provides clear policies and guidelines, and draws on more than one learning theory.

I like the constructivist approach to learning because it allows learners to construct their own understanding through experiences and reflection, can be self-directed, as well as collaborative and applies scaffolding based on Vygotsky's zone of proximal development (ZPD) (Harasim, 2017).

Constructivist pedagogical approaches used are problem-based learning (PBL), distributed problem-based learning, case-based learning (CBL), inquiry-based learning, and role simulation and game-based learning (Harasim, 2017).

An example of this theory in action is the collaborative problem-solving activity I designed for an Introduction to Yukon. Within this activity learners split up into groups of 3 and were each assigned a job role. The learners were then provided a detailed description of the problem, a short summary of their role, and a set of guided questions to answer. They were asked to work together as a group and describe how they would handle the problem through their collaborative efforts and then share this with their colleagues.

Cognitivism is an important theory to apply as it allows the learner to further understand the goals and objectives for the learning while bringing forth their attention to prior knowledge, provides the learner guidance through facilitated prompts, elicits learner performance through

testing, portfolios, performances, or projects, enhances knowledge transfer through repetition, and allows opportunities for feedback (Harasim, 2017).

In the Introduction to Yukon online training cognitivist approaches are used in the discussion boards where learners must think about how they would apply the knowledge they learned. It's also used within the self-knowledge check quiz at the end of each module as this helps them to reflect and comprehend their level of mastery regarding the concepts covered.

Humanim is important to me as it focuses on the premise that all learners have the potential for growth and advocates for individual freedom of choices and behaviors. This application of theory focuses on student-centered learning where the instructor is a facilitator rather than a dispenser of knowledge (Merriam & Bierema, 2014). Self-directed and transformational learning are deeply grounded in humanism and focus on learners overseeing their own learning with the goal of self-development in mind. As a designer if there is a chance to provide these opportunities, I feel the learner will experience increased motivation to learn and possess a new purpose to apply and share their learning.

Humanism is found in an Introduction to Yukon as the course is asynchronous, promotes self-directed learning, and provides opportunities for learners to share their own insights within the discussion boards. Instead of using a teacher-centered approach the training relies on e-Mentors and facilitators to help guide discussions and encourage the community to learn from each other's experiences.

Online Learning and Distance Education

Distance education relies strongly upon online learning and requires communication through technologies (Moore & Kearsley, 2012). Distance education not only looks at technology, but learning, teaching, and course design (Moore & Kearsley, 2012). As an adult

learner partaking in UNM's graduate courses through online learning, I have learned the most

when constructivist, cognitivist, and humanist theories are the underlying foundations of the

design. As an instructional designer I recognize the importance to incorporate components that

facilitate these learning theories with attention to cultural inclusivity.

I've learned that in order to create a culturally inclusive online environment a course

design must take into consideration the primary components found in the WisCom framework.

These primary components are community, wisdom, communication, technology, distributed co-

mentoring, learner support, problem-solving, and the collaborative inquiry cycle (CIC)

(Gunawardena, Frechette, & Layne, 2019).

Conclusion

I hope that you have learned a little more about instructional design and the learning

theories I most resonate with personally and professionally. I look forward to working with you

on your next instructional design project.

References

Gunawardena, C. N., Frechette, C., & Layne, L. (2019*). Culturally inclusive instructional design: a framework and guide for building online wisdom communities.* New York, NY: Routledge.

Harasim, L. M. (2017). *Learning theory and online technologies*. New York: Routledge.

Merriam, S. B., & Bierema, L. L. (2014). *Adult learning: linking theory and practice*. San Francisco, CA: Jossey-Bass.

Moore, M. G., & Kearsley, G. (2012). *Distance education: a systems view of online learning.* Belmont, CA: Wadsworth Cengage Learning.

APPENDIX A

Learner Analysis Survey Results

Learner and Needs Analysis for Yukon Online Training
Q1. What is your job
title?

Answered	**39**
Skipped	**0**

Respondents	Response Date	Responses
1	Mar 05 2020 07:59 AM	Supplier Business Manager
2	Feb 26 2020 05:13 PM	Inside Sales
3	Feb 26 2020 02:48 PM	Customer Service
4	Feb 26 2020 02:30 PM	Inside Sales
5	Feb 26 2020 01:42 PM	Inside Sales
6	Feb 26 2020 12:35 PM	Inside Sales
7	Feb 26 2020 11:17 AM	Inside sales
8	Feb 26 2020 10:06 AM	Inside Sales
9	Feb 26 2020 09:57 AM	Inside Sales Rep
10	Feb 26 2020 09:52 AM	Inside sales
11	Feb 26 2020 08:31 AM	Inside Sales
12	Feb 26 2020 04:37 AM	ISR
13	Feb 25 2020 08:08 PM	Inside Sales
14	Feb 25 2020 07:20 PM	Director
15	Feb 25 2020 12:52 PM	Inside Sales
16	Feb 25 2020 12:32 PM	Inside Sales Rep
17	Feb 25 2020 12:20 PM	Inside Sales
18	Feb 25 2020 11:55 AM	Asset Manager
19	Feb 25 2020 11:48 AM	Inside Sales Representative
20	Feb 25 2020 11:33 AM	Product Manager
21	Feb 25 2020 11:21 AM	Inside Sales Manager / CM Sales Manager
22	Feb 25 2020 11:15 AM	Database Analyst and Report Writer
23	Feb 25 2020 11:01 AM	Product Manager
24	Feb 25 2020 10:43 AM	European Strategic Accounts Manager
25	Feb 25 2020 09:57 AM	Product Manager
26	Feb 25 2020 09:54 AM	Sales Manager
27	Feb 25 2020 09:53 AM	VP Marketing
28	Feb 25 2020 09:53 AM	Director of Engineering
29	Feb 25 2020 09:52 AM	Field Sales
30	Feb 25 2020 09:47 AM	Product Manager
31	Feb 25 2020 09:39 AM	Asset Manager
32	Feb 25 2020 09:37 AM	Purchasing and Logistics

33	Feb 25 2020 09:33 AM	Internal Sales
34	Feb 25 2020 09:22 AM	Inside Sales
35	Feb 24 2020 08:14 AM	Sales Specialist
36	Feb 22 2020 11:13 AM	PMM
37	Feb 21 2020 03:59 PM	Inside Sales Supervisor
38	Feb 21 2020 03:04 PM	COO
39	Feb 21 2020 02:46 PM	FSR

Q2. What company do you work for?

Answered   **39**
Skipped   **0**

Respondents	Response Date	Responses
1	Mar 05 2020 07:59 AM	RFMW
2	Feb 26 2020 05:13 PM	RFMW
3	Feb 26 2020 02:48 PM	RFMW
4	Feb 26 2020 02:30 PM	RFMW
5	Feb 26 2020 01:42 PM	RFMW Inc
6	Feb 26 2020 12:35 PM	RFMW
7	Feb 26 2020 11:17 AM	RFMW
8	Feb 26 2020 10:06 AM	Component Distributors
9	Feb 26 2020 09:57 AM	RFMW
10	Feb 26 2020 09:52 AM	RFMW
11	Feb 26 2020 08:31 AM	RFMW
12	Feb 26 2020 04:37 AM	CDI
13	Feb 25 2020 08:08 PM	RFMW Asia Pte Ltd
14	Feb 25 2020 07:20 PM	RFMW
15	Feb 25 2020 12:52 PM	RFMW
16	Feb 25 2020 12:32 PM	RFMW
17	Feb 25 2020 12:20 PM	Component Distributors, Inc.
18	Feb 25 2020 11:55 AM	RFMW
19	Feb 25 2020 11:48 AM	Component Distributors, Inc.
20	Feb 25 2020 11:33 AM	RFMW
21	Feb 25 2020 11:21 AM	CDI
22	Feb 25 2020 11:15 AM	Logisticsflow
23	Feb 25 2020 11:01 AM	Component Distributors Inc.
24	Feb 25 2020 10:43 AM	RFMW
25	Feb 25 2020 09:57 AM	RFMW
26	Feb 25 2020 09:54 AM	RFMW
27	Feb 25 2020 09:53 AM	RFMW

28	Feb 25 2020 09:53 AM	CDI
29	Feb 25 2020 09:52 AM	CDI
30	Feb 25 2020 09:47 AM	RFMW
31	Feb 25 2020 09:39 AM	RFMW
32	Feb 25 2020 09:37 AM	RFMW UK Ltd
33	Feb 25 2020 09:33 AM	RFMW UK
34	Feb 25 2020 09:22 AM	RFMW
35	Feb 24 2020 08:14 AM	CDI
36	Feb 22 2020 11:13 AM	CDI
37	Feb 21 2020 03:59 PM	RFMW
38	Feb 21 2020 03:04 PM	CDI
39	Feb 21 2020 02:46 PM	CDI

Q3. How long have you worked for the company? (Example: 5 years, 6 months, etc.)

Answered   39
Skipped   0

Respondents	Response Date	Responses
1	Mar 05 2020 07:59 AM	1 year
2	Feb 26 2020 05:13 PM	3 years
3	Feb 26 2020 02:48 PM	4 years
4	Feb 26 2020 02:30 PM	4 years
5	Feb 26 2020 01:42 PM	2 years
6	Feb 26 2020 12:35 PM	15 years
7	Feb 26 2020 11:17 AM	15 Years
8	Feb 26 2020 10:06 AM	60 days
9	Feb 26 2020 09:57 AM	9 months
10	Feb 26 2020 09:52 AM	14 years
11	Feb 26 2020 08:31 AM	8.3 yrs
12	Feb 26 2020 04:37 AM	12 years
13	Feb 25 2020 08:08 PM	9 years
14	Feb 25 2020 07:20 PM	11 months
15	Feb 25 2020 12:52 PM	11 years
16	Feb 25 2020 12:32 PM	8 months
17	Feb 25 2020 12:20 PM	1 year, 10 months
18	Feb 25 2020 11:55 AM	1 year, 5 months
19	Feb 25 2020 11:48 AM	22 years, 4 months
20	Feb 25 2020 11:33 AM	1 yr 7 mos
21	Feb 25 2020 11:21 AM	14 years
22	Feb 25 2020 11:15 AM	5 years
23	Feb 25 2020 11:01 AM	5 years and 10 months

24	Feb 25 2020 10:43 AM	2 YEARS
25	Feb 25 2020 09:57 AM	1 year, 3 weeks
26	Feb 25 2020 09:54 AM	13 years total
27	Feb 25 2020 09:53 AM	5 years 3 months
28	Feb 25 2020 09:53 AM	16 Years
29	Feb 25 2020 09:52 AM	2 Years
30	Feb 25 2020 09:47 AM	4 years 10 months
31	Feb 25 2020 09:39 AM	9 years 6 months
32	Feb 25 2020 09:37 AM	8 Years
33	Feb 25 2020 09:33 AM	2 years 4 months
34	Feb 25 2020 09:22 AM	12y
35	Feb 24 2020 08:14 AM	4 years
36	Feb 22 2020 11:13 AM	14 Years
37	Feb 21 2020 03:59 PM	16 years
38	Feb 21 2020 03:04 PM	8 long, long years :)
39	Feb 21 2020 02:46 PM	~5 yr

Q4. How long have you been using Yukon? (Example: 5 years, 6 months, etc.)

Answered   **39**
Skipped   **0**

Respondents	Response Date	Responses
1	Mar 05 2020 07:59 AM	1 year
2	Feb 26 2020 05:13 PM	3 years
3	Feb 26 2020 02:48 PM	4 years
4	Feb 26 2020 02:30 PM	4 years
5	Feb 26 2020 01:42 PM	2 years
6	Feb 26 2020 12:35 PM	15 years
7	Feb 26 2020 11:17 AM	15 Years
8	Feb 26 2020 10:06 AM	60 days
9	Feb 26 2020 09:57 AM	9 months
10	Feb 26 2020 09:52 AM	14 years
11	Feb 26 2020 08:31 AM	8.3 yrs
12	Feb 26 2020 04:37 AM	12 years
13	Feb 25 2020 08:08 PM	5 years
14	Feb 25 2020 07:20 PM	11 months
15	Feb 25 2020 12:52 PM	11 years
16	Feb 25 2020 12:32 PM	8 months (although i worked at CDI and helped develop Yukon in the early days, mid 1990s)
17	Feb 25 2020 12:20 PM	13 years
18	Feb 25 2020 11:55 AM	1 year, 5 months

19	Feb 25 2020 11:48 AM	20 years
20	Feb 25 2020 11:33 AM	1 yr 7 mos
21	Feb 25 2020 11:21 AM	14 years
22	Feb 25 2020 11:15 AM	5 years
23	Feb 25 2020 11:01 AM	5 years and 10 months
24	Feb 25 2020 10:43 AM	2 YEARS
25	Feb 25 2020 09:57 AM	1 year, 3 weeks
26	Feb 25 2020 09:54 AM	3 years
27	Feb 25 2020 09:53 AM	5 years 3 months
28	Feb 25 2020 09:53 AM	16 Years
29	Feb 25 2020 09:52 AM	2 Years
30	Feb 25 2020 09:47 AM	4 years 10 months
31	Feb 25 2020 09:39 AM	9 years 6 months
32	Feb 25 2020 09:37 AM	2 Years 6 months
33	Feb 25 2020 09:33 AM	2 years 4 months
34	Feb 25 2020 09:22 AM	12y
35	Feb 24 2020 08:14 AM	4 years two months
36	Feb 22 2020 11:13 AM	14 Years
37	Feb 21 2020 03:59 PM	16 years
38	Feb 21 2020 03:04 PM	8 even longer years
39	Feb 21 2020 02:46 PM	~5 yr

Q5. How often do you use Yukon as a part of your job requirements?

Answer Choices	Responses	
Constantly	69.23%	27
Daily	23.08%	9
Weekly	0.00%	0
Monthly	2.56%	1
Once a quarter	2.56%	1
Once a year	2.56%	1
	Answered	**39**
	Skipped	**0**

Q6. List the top 3 tasks you use Yukon for:

Answer Choices	Responses	
Task 1	100.00%	39
Task 2	100.00%	39
Task 3	94.87%	37
	Answered	**39**
	Skipped	**0**

Respondents	Response Date	Task 1
1	Mar 05 2020 07:59 AM	Loading pricing for quotes

2	Feb 26 2020 05:13 PM	Quoting
3	Feb 26 2020 02:48 PM	Web orders
4	Feb 26 2020 02:30 PM	Order Entry
5	Feb 26 2020 01:42 PM	Quotes
6	Feb 26 2020 12:35 PM	Quotes
7	Feb 26 2020 11:17 AM	quoting
8	Feb 26 2020 10:06 AM	Customer New Inquiries and Historical Information
9	Feb 26 2020 09:57 AM	quoting
10	Feb 26 2020 09:52 AM	quotes
11	Feb 26 2020 08:31 AM	RFQ Processing-> Quoting
12	Feb 26 2020 04:37 AM	sales order
13	Feb 25 2020 08:08 PM	Quotation
14	Feb 25 2020 07:20 PM	Opportunity Lists
15	Feb 25 2020 12:52 PM	Quoting
16	Feb 25 2020 12:32 PM	Quoting
17	Feb 25 2020 12:20 PM	Inquiries
18	Feb 25 2020 11:55 AM	Buying
19	Feb 25 2020 11:48 AM	inquiry
20	Feb 25 2020 11:33 AM	Fulfilling Quotes
21	Feb 25 2020 11:21 AM	Opportunities
22	Feb 25 2020 11:15 AM	Data Management
23	Feb 25 2020 11:01 AM	customer orders
24	Feb 25 2020 10:43 AM	Sales Orders
25	Feb 25 2020 09:57 AM	RFQ/entering pricing
26	Feb 25 2020 09:54 AM	Quotes
27	Feb 25 2020 09:53 AM	price look up
28	Feb 25 2020 09:53 AM	Looking up part numbers to verify information
29	Feb 25 2020 09:52 AM	Opp Management
30	Feb 25 2020 09:47 AM	quoting
31	Feb 25 2020 09:39 AM	purchasing
32	Feb 25 2020 09:37 AM	Booking in
33	Feb 25 2020 09:33 AM	Inquiries
34	Feb 25 2020 09:22 AM	Inquires/QUotes/Orders
35	Feb 24 2020 08:14 AM	quoting
36	Feb 22 2020 11:13 AM	Quote Review and Follow Up
37	Feb 21 2020 03:59 PM	Inquiry
38	Feb 21 2020 03:04 PM	re-assigning web inquiries
39	Feb 21 2020 02:46 PM	Stock check

Q7. What are the top Yukon tasks you wish you had more training on?

Answer Choices	Responses	
Task 1	100.00%	30
Task 2	66.67%	20
Task 3	50.00%	15
Task 4	30.00%	9
Task 5	26.67%	8
	Answered	**30**
	Skipped	**9**

Response Date	Task 1	Task 2	Task 3
Mar 05 2020 07:59 AM	how to find an order	how to find the cusotmer quote	how to be sure of inventory av
Feb 26 2020 05:13 PM	Opportunities	Ship & Debits	Large quotes
Feb 26 2020 02:48 PM	The RMA process		
Feb 26 2020 02:30 PM	allocating parts (certain functions)	Reports	
Feb 26 2020 01:42 PM	Shortcuts/icons	Opportunities	Allocations
Feb 26 2020 12:35 PM	correct format	line items matching customers	Wish we could insert lines ins
Feb 26 2020 10:06 AM	Data Management tool	Reports When to use Yukon vs BI tool	Deal Calculator
Feb 26 2020 08:31 AM	Consignment Order Entry & processing	Consignment Order Entry & processing	Consignment Order Entry & p
Feb 26 2020 04:37 AM	deal calculator		
Feb 25 2020 08:08 PM	RMA process	Checking on inventory movement details	
Feb 25 2020 12:52 PM	Consignment orders		
Feb 25 2020 12:32 PM	opportunities	Special pricing info / DW pricing	
Feb 25 2020 12:20 PM	Opportunity updates		
Feb 25 2020 11:55 AM	RMA's		
Feb 25 2020 11:48 AM	replenishment	rmas	related products
Feb 25 2020 11:33 AM	Reserve Orders/Safety stock analysis	Understanding replenishment page	Buying (cross-training with as
Feb 25 2020 11:21 AM	consignment	warehouse	accounting
Feb 25 2020 11:15 AM	Reserve orders	Consignment orders	Supplier orders via EDI
Feb 25 2020 11:01 AM	accounting ramifications	warehouse process	ISR process
Feb 25 2020 10:43 AM	Transfers	Pulling data for orders and shipping	allocation
Feb 25 2020 09:57 AM	Mass updating	Report writing/pulling	understanding the behind the s
Feb 25 2020 09:54 AM	Reporting functionality	Returns / RMAs	Most efficient methods of data
Feb 25 2020 09:53 AM	N/A		
Feb 25 2020 09:52 AM	Report Generation	Opportunities	Sales Funnel Mgmt
Feb 25 2020 09:47 AM	exporting files		
Feb 25 2020 09:39 AM	returns	forecasting	
Feb 25 2020 09:33 AM	Opportunities		
Feb 24 2020 08:14 AM	running reports with specific data		
Feb 21 2020 03:04 PM	honestly i am not sure		
Feb 21 2020 02:46 PM	supplier orders	finding tracking info faster	

Q8. How proficient would you say you are with using Yukon to its fullest capabilities?

Answer Choices	Responses	
Beginner	5.13%	2
Developing	12.82%	5
Competent	53.85%	21
Advanced	28.21%	11
Expert	0.00%	0
	Answered	**39**
	Skipped	**0**

Q9. How would you rate your ease of completing your work tasks within Yukon?

Answer Choices	Responses	
Very easy	30.77%	12
Moderately easy	53.85%	21
Neither easy nor difficult	15.38%	6
Moderately difficult	0.00%	0
Very difficult	0.00%	0
	Answered	**39**
	Skipped	**0**

Q10. On the task you would like the most training on, do you know the sub-tasks involved in completing it?

Answer Choices	Responses	
Yes	20.00%	7
No	34.29%	12
Kind of	37.14%	13
There are none	8.57%	3
	Answered	**35**
	Skipped	**4**

Q11. How would you rank the extent of your current support regarding questions you have on Yukon?

Answer Choices	Responses	
Significant support	41.03%	16
Moderate support	41.03%	16
Slight support	15.38%	6
No support	2.56%	1
	Answered	**39**
	Skipped	**0**

Q12. Please rank the ways you most often receive support regarding Yukon questions with #1 being the most used and #5 being the least.

	1		
Send in a help ticket for trained personnel to complete	11.11%	4	13.
Ask a peer, mentor or manager	18.42%	7	60.
Search the knowledge base	0.00%	0	8.
Try to figure out on your own	72.97%	27	13.
Other	0.00%	0	0.

Q13. Do you think a short online training program centered around Yukon would be helpful to your job performance?

Answer Choices	Responses	
Significantly helpful	25.64%	10
Moderately helpful	23.08%	9
Slightly helpful	41.03%	16
Not at all helpful	10.26%	4
Answered		**39**
Skipped		**0**

Q14. How many hours a week would you have to devote to an online training?

Answer Choices	Responses	
More than 5 hours	0.00%	0
4 - 5 hours	2.56%	1
2 - 3 hours	2.56%	1
1 hour	56.41%	22
Less than 1 hour	38.46%	15
Answered		**39**
Skipped		**0**

Q15. When would you prefer to complete the online training?

Answer Choices	Responses	
During work	64.10%	25
After work	7.69%	3
Before work	5.13%	2
A mixture of times	23.08%	9
On the weekend	0.00%	0
Answered		**39**
Skipped		**0**

Q16. Have you ever taken an online training or class?

Answer Choices	Responses	
Yes	89.47%	34

No	10.53%	4
Answered		**38**
Skipped		**1**

Q17. Would you have availability for synchronous (all at the same time) training sessions or would you prefer asynchronous (completed within your own time frame) training? I would prefer:

Answer Choices	Responses	
Synchronous training	23.68%	9
Asynchronous training	28.95%	11
Both	26.32%	10
No preference	21.05%	8
Answered		**38**
Skipped		**1**

Q18. What type of device would you primarily use when accessing the online training?

Answer Choices	Responses	
Desktop computer	89.74%	35
Tablet	5.13%	2
Mobile device	0.00%	0
Both desktop and mobile	5.13%	2
A mix of all	0.00%	0
Answered		**39**
Skipped		**0**

Q19. Do you consider yourself more of a solitary or collaborative learner? For example, if you select solitary you would rather discover and synthesize the content independently and provide an artifact of your learning. If you select collaborative, you look forward to coming to an understanding of the knowledge through more group-oriented activities and a shared understanding of the learning. Please select which you identify with most:

Answer Choices	Responses	
Collaborative learner	20.51%	8
Solitary learner	17.95%	7
A little of both	61.54%	24
Answered		**39**
Skipped		**0**

Q20. In remembering your past training experiences, would you share a positive learning experience or something that was most useful and memorable or best helped you to facilitate knowledge transfer? (Example: graphics, videos, hands on training, real-world activities, the facilitator/trainer, mentor support, group collaboration, etc.)

Answered   **30**

Skipped   **9**

Respondents	Response Date	Responses
1	Feb 26 2020 05:13 PM	Definitely hands on training, with real examples. Not everyone is at the same level -- most Inside sales reps are highly functioning in Yukon. But everyone can benefit on learning something new, or a different/more efficient way of doing a task. And it's always good to learn, have a refresher.
2	Feb 26 2020 02:48 PM	Sharing a screen with my trainer so I can see the process. I'm better as a visual learner.
3	Feb 26 2020 02:30 PM	all listed
4	Feb 26 2020 01:42 PM	Having a visual is key. being able to follow along by screen sharing has been helpful
5	Feb 26 2020 12:35 PM	Videos and actual pictures of what the screens should look like with step by step instructions to reference.
6	Feb 26 2020 10:06 AM	Hands on, but hand outs for reference. Mentor support
7	Feb 26 2020 09:52 AM	live demo
8	Feb 26 2020 08:31 AM	Demonstrations of procedure combined with documented steps followed by the opportunity to practice the skill in a hands on environment
9	Feb 26 2020 04:37 AM	hands on training
10	Feb 25 2020 08:08 PM	Hands on Training
11	Feb 25 2020 12:52 PM	Hands on
12	Feb 25 2020 12:32 PM	on line trainings done on our own with short 5 -10 question quiz at the end. the training had within in scenarios to work using the content being discussed. creates interaction and hands on.
13	Feb 25 2020 12:20 PM	On line training with a written back up for taking notes

14	Feb 25 2020 11:55 AM	Having a procedure/instructions along with the group's input was very helpful
15	Feb 25 2020 11:48 AM	I really don't remember any past training of Yukon since I was one of the first to use it. I learned on my own mostly.
16	Feb 25 2020 11:33 AM	Hands on, in person training with someone very knowledgeable of Yukon
17	Feb 25 2020 11:21 AM	Hands on training best
18	Feb 25 2020 11:15 AM	the facilitator/trainer
19	Feb 25 2020 11:01 AM	Before EOS began, the Asset Managers got together bi-weekly to catch up and discuss issues. Being the newest of the group, I had the most a-ha moments during the calls. Kathy Hazen was my rock and go-to for all questions when I had a "quick" question about something. Patti helps a lot when something urgent comes up and is very patient.
20	Feb 25 2020 10:43 AM	For me graphics and running through the situation while you are using the system. Not just watching someone and writing notes (This is fine, but doing it is better).
21	Feb 25 2020 09:57 AM	Utilizing our own system when training - using our screens that we see not a mocked up version
22	Feb 25 2020 09:54 AM	I have always found that hands on training is best and most useful to me - either through reading/video material and trying myself, or being mentored.
23	Feb 25 2020 09:53 AM	the ability to ask questions and get immediate feedback
24	Feb 25 2020 09:53 AM	Real world activities that have immediate impact on the job function
25	Feb 25 2020 09:52 AM	collaborative training, the ability to complete exercises in the system alongside the trainer
26	Feb 25 2020 09:37 AM	hands on training
27	Feb 25 2020 09:33 AM	hands on training

	Feb 24 2020 08:14	
28	AM	graphics, hands on
29	Feb 21 2020 03:59 PM	Print out's to fall back on
30	Feb 21 2020 03:04 PM	real-world examples where i can work "alongside" the presenter

Q21. In remembering your past training experiences, would you share an unsuccessful learning experience (Example: lack of support, lack of motivation, lack of supplemental information, confusing or unclear instructions, etc.)?

Answered   29
Skipped   10

Respondents	Response Date	Responses
1	Feb 26 2020 05:13 PM	Just need to make sure there's good reference material so that if needed, we can go back to it... if it's a task we do not do often on a daily basis, don't want to forget how or bother someone else. Would be nice to have a hot key or index in Yukon saying "how do you......" or show me example of how to etc.
2	Feb 26 2020 02:48 PM	Only hearing information on a phone is harder for me to fully comprehend learning something new.
3	Feb 26 2020 02:30 PM	confusing or unclear
4	Feb 26 2020 01:42 PM	Lack of information when instuctions are broad, hard to fill in the lines when its training for something you are new too
5	Feb 26 2020 12:35 PM	Unclear instructions and no reference material after the training.
6	Feb 26 2020 11:17 AM	I think if you are trained on something it has to be something you use often. If you don't you will forget.
7	Feb 26 2020 10:06 AM	Lack of resources or support. Presentation only with no hands on.
8	Feb 26 2020 09:52 AM	don't recall
9	Feb 26 2020 08:31 AM	Unclear instructions; poor documentation
10	Feb 26 2020 04:37 AM	on the spot role playing
11	Feb 25 2020 08:08 PM	Sometimes confusing
12	Feb 25 2020 12:32 PM	non interactive training.

13	Feb 25 2020 12:20 PM	A training with no additional notes
14	Feb 25 2020 11:55 AM	Not having a procedure/instructions to go along with the training & having to take notes. All I did was try to keep up taking notes & didn't retain the training info
15	Feb 25 2020 11:48 AM	I really do not have one.
16	Feb 25 2020 11:33 AM	Lack of supplemental information. Once I was back in my office, working remotely, I had to figure much of this out on my own.
17	Feb 25 2020 11:21 AM	Consignment process is very confusing and difficult to recall when not done often
18	Feb 25 2020 11:15 AM	lack of direction Within the lesson
19	Feb 25 2020 11:01 AM	Helpdesk questions feel like they're on the back burner most of the time, hence why I often contact Roger, Patti or Brittany with a "quick" question as my situation is often timely. Kristi and I have joined the bi-weekly Logistics Flow meeting to understand what the company is going through in that department and I understand the growth in Logistics Flow, however it can feel like the sales side of things is less important than this new growth. Just my feeling in general.
20	Feb 25 2020 10:43 AM	People having several ways to do something when it could be simple to all do the same thing.
21	Feb 25 2020 09:57 AM	Unclear instructions - written instructions on how to do basic to advanced
22	Feb 25 2020 09:54 AM	Often find that being trained as part of a larger group can sometimes become confusing as there ends up being too many people asking questions during the training and the tendency for the course/training to go off on a tangent. Group training can be really good and useful but, in my experience, kept to smaller groups or have Q&A at the end of the course.
23	Feb 25 2020 09:53 AM	long periods with no break make it hard to focus on the material.
24	Feb 25 2020 09:53 AM	Superfluous information not pertinent to the pre-described subject matter.
25	Feb 25 2020 09:52 AM	being handed a packet and having to completely train solo
26	Feb 25 2020 09:33 AM	lack of support
27	Feb 24 2020 08:14 AM	unclear instructions, poor/vague content
28	Feb 21 2020 03:59 PM	Info was to scattered
29	Feb 21 2020 03:04 PM	bad delivery, boredom

Q22. Is there anything else you would like to share or learn that would help us to better create a short online training for Yukon?

Answered **15**

Skipped **24**

Responde nts	Respon se Date	Responses
1	Feb 26 2020 05:13 PM	Don't think it needs to be weekly -- every other week.
2	Feb 26 2020 02:48 PM	Converting web orders into actual Yukon orders when we have to include a tariff line which is not on our website. Also customers are not shown online what the cost of the shipping is and often surprised when I send them their order acknowledgement from Yukon which does show it.
3	Feb 26 2020 01:42 PM	Would like to understand how the PM and asset use Yukon as we use different screens but want to help eachother.
4	Feb 26 2020 10:06 AM	Being newer to the team and working in a remote environment I highly support some online training courses by subject (easy to access)
5	Feb 25 2020 08:08 PM	Most of the time it requires hands on to understand the process or even a power point on steps by steps training in sections will be good. For example, sales inquiry process, quotation process, shipment process, RMA process. As such, it will be easier for new employees to pick up as and when they come across any problem in Yukon.
6	Feb 25 2020 12:32 PM	There are many types of customers, quotes, situations, getting the sales & purchasing involved in the creation of training is key to the success of capturing all levels of the business. Also finding those sales people that have worked on different distribution sales tools currently in the industry can help training from a wider perspective.
7	Feb 25 2020 11:48 AM	I find it frustrating when product management asked if we have stock on something or if an order shipped. I makes me wonder if they know how to use Yukon
8	Feb 25 2020 11:33 AM	It should be position specific for the most part, save for functions used across all roles.
9	Feb 25 2020 11:15 AM	I think following the inventory through the order/supplier order process all the way through to the shipment process (including the pick list) would be helpful.

10	Feb 25 2020 11:01 AM	Perhaps monthly or bi-monthly training sessions on a chosen topic would be helpful to all. ISR's and PM's probably have the most knowledge of Yukon compared to the FSR's. Everyone could use a refresher course, especially when an upgrade has been made to Yukon and the emails identifying the update don't always make sense to the layman - when they are sent out.
11	Feb 25 2020 10:43 AM	Adding a search tool on the find transaction tab to allow you to find customer ref number i.e. supplywin numbers I enter into yukon if inquiry number is missed off.
12	Feb 25 2020 09:57 AM	How to add our notes automatically to quotes and purchase orders
13	Feb 25 2020 09:54 AM	I think the most proficient way could be to keep the training to specific categories - e.g. a session on inquiries/quotes, then move on to sales order and so on. This way it keeps it short and focused.
14	Feb 25 2020 09:53 AM	Emphasize the need for accuracy with data and the need for intelligent part number descriptions that other people (customers) and understand.
15	Feb 25 2020 09:33 AM	no thank you.

APPENDIX B

Screenshots from Initial Prototype Modules 1 and 2

Main Course Login
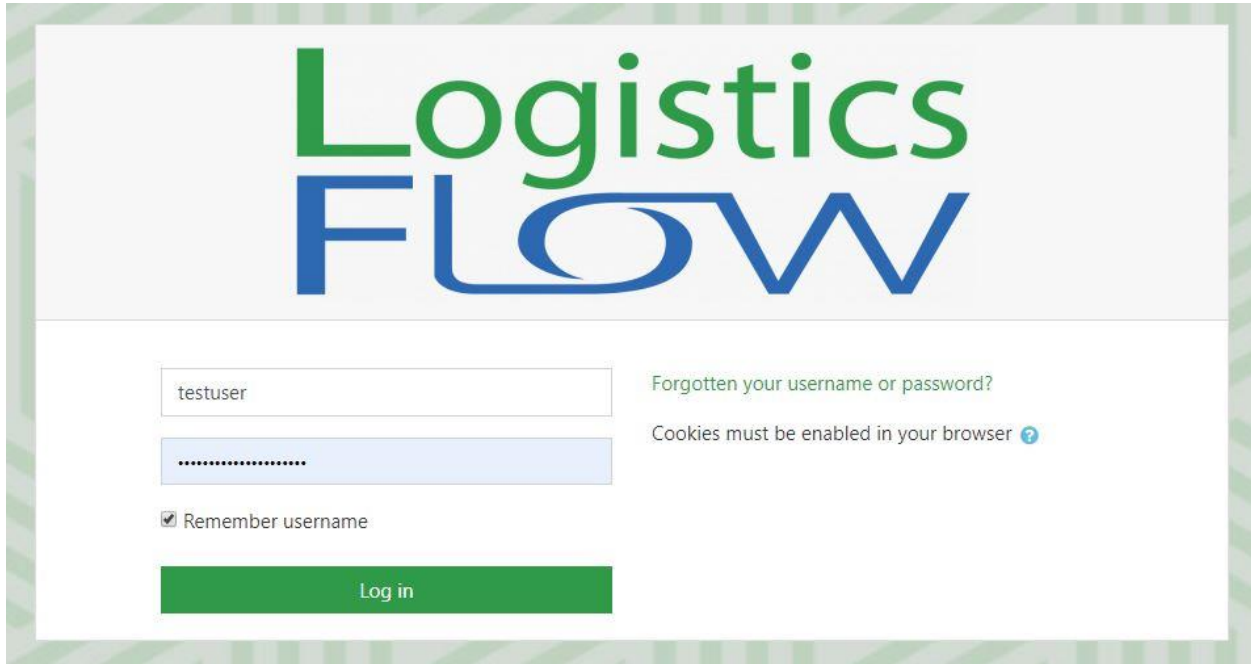
Main Dashboard After Login

Course Home Page

General Course Communication

Welcome and Start Module

Module 1 Parent Page

Module 1: Training Overview

Welcome to Module 1 Training Overview. Please start by completing the 6-Question Pre-Training Survey in sub-module 1.0. Then follow the proceeding sub-modules 1.1-1.5 to learn about the overall training objectives set forth by this course followed by the additional information you need to successfully complete the training.

- Module 1.0: 6-Question Pre-Training Survey
- Module 1.1: Overall Training Objectives & Duration
- Module 1.2: Format & Schedule
- Module 1.3: Support, Resources, Links, & FAQs
- Module 1.4: Policies, Netiquette, & Copyright
- Module 1.5: Introduction Discussion Activity

Module 1 Pre-Training Survey

An Introduction to Yukon Online Training

Home / My courses / Miscellaneous / Intro to Yukon / Module 1: Training Overview / Module 1.0: 6-Question Pre-Training Survey

Module 1.0: 6-Question Pre-Training Survey

Welcome

Please follow this link https://www.surveymonkey.com/r/QN5D6BQ to complete a 6-question pre-training survey that will help the facilitators and e-mentors determine your level of Yukon experience. You will be able to compare the extent of knowledge transfer you have gained at the end of the training when you take the post-course training survey.

Last modified: Sunday, 12 April 2020, 9:57 PM

◄ How to Navigate the Course (Video)   Jump to...   Module 1.1: Overall Training Objectives & Duration ►

Module 1 Overall Training Objectives

Module 1.1: Overall Training Objectives & Duration

Click here to download pdf

Overall Training Objectives:

1. **Recognize** the different types of Yukon tasks that support various processes within the electronic distribution sales channel.
2. **Apply** basic Yukon operating procedures when accessing historical and product information, dealing with quotes, opportunities, and orders.
3. **Evaluate and state** the best way to handle a given customer scenario by relating it back to the module information provided.
4. **Express and discuss** learning gaps or concerns pertaining to each module.
5. **Recall** information in a self-knowledge check at the end of each module.
6. **Identify and use** Yukon resources and support material for future use.

Duration:

- Each module should take **1-3 hours per week** to complete.
- The training will span a little over a 2-month period and equals a total of **20 hours of material**.
- Training starts on **Monday July 6, 2020** and ends on **September 11, 2020**.

Module 1 Course Format and Schedule

Module 1.2: Format & Schedule ⚙

Click here to download pdf

Format:

Most modules will take a week to review the content and complete the activities which entail a discussion activity with guided question prompts and will end with a self-knowledge check. Module 6 will take 2 weeks to complete as there will be a collaborative learning challenge presented.

Please start each module on the Monday of the given week provided in the schedule below and complete your discussion post no later than Thursday of that week. Please post a reply to one of your colleagues by the end of day on Friday of that week.

You may want to re-visit the discussion board again the following Monday to see what additional posts and comments were made. If time doesn't allow, don't worry one of the training facilitators will send out an Announcement on Monday morning after the module was completed through the course that will highlight reoccurring themes and provide helpful summary information from your discussions.

Schedule:

* indicates a 2-week module.

1. **Week 1: July 6 – 10**
   Module 1.0-1.5: Training Overview
   Covers: 6-Question Pre-Training Survey, Overall Training Objectives & Duration, Schedule & Format, Support, Resources, Links, & FAQs, Policies, Netiquette, & Copyright, and Introduction Discussion Activity.

2. **Week 2: July 13 – 17**
   Module 2.0-2.8: Historical Information
   Covers: Introduction & Learning Objectives, Daily Activity Screen, Search for Existing Customer, Customer Activity Page, Find Transaction, Editing a Customer Profile, Forecasting, Discussion Activity, and 5-Question Self Knowledge Check.

Module 1 Policies, Netiquette, & Copyright

Module 1.4: Policies, Netiquette, & Copyright

Click here to download pdf

Policies:

1. **Security:**
   This course provides you with a secure login and password.
2. **Accessibility:**
   This course adheres to ADA compliance standards for online course design and allows for navigation via keyboard only, provides alternative text on images and files, makes links descriptive, uses hierarchical headings for content sections, provides caption video and transcribed audio, presents content in multiple ways, and uses color combinations that are high contrast.
3. **Participation:**
   As a participant of this training you are expected to participate in the weekly modules unless you have communicated a schedule conflict to the course facilitator. We ask this, because in order to build a community of inquiry the training requires participant commitment.
4. **Suggestions & Complaints:**
   If you have a suggestion and/or complaint about the course please email yukonisd@logisticsflow.com.
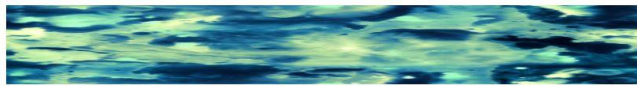
Support & Documentation:

Overall training learning objectives, duration, schedule, format, support, resources, FAQs, and an introduction are made available to participants enrolled in the course during week 1 and found in Module 1. You can access this anytime throughout the duration of the training.

Netiquette:

1. **What is Netiquette?**
   Netiquette, a social code that defines "good" online behavior is something to keep in mind during your training interactions. Writing may be the only means of communication you have with classmates and instructors, so it is especially important to do this effectively. Follow the guidelines below to leave your mark as a knowledgeable, respectful and polite participant who is positioned to succeed professionally.
2. **Be Scholarly**
   Do: Use proper language, grammar and spelling. Be explanatory and justify your opinions. Credit the ideas of others through citing and linking to resources.
   Avoid: Misinforming others when you may not know the answer. If you are guessing about something, clearly state that you do not know the answer.
3. **Be Respectful**
   Do: Respect privacy, diversity and opinions of others. Communicate tactfully and base disagreements on research evidence.
   Avoid: Sharing another person's professional or personal information.
4. **Be Professional**
   Do: Represent yourself well at all times. Be truthful, accurate and run a final spell check. Avoid: Using profanity or participating in hostile interactions.
5. **Be Polite**

Module 1 Support, Resources, Links, FAQs

Module 1.3: Support, Resources, Links, & FAQs

Click here to download pdf

Overview:

During the training you can visit Module 1.3: Support, Resources, Links, & FAQs to reference and download all course material files, email course facilitators for content or IT help pertaining to your Moodle Cloud login, and have access to other resources that supplement the training content. It is a good idea to save the material from this course to your local hard drive for future reference, as a week after the course ends you will no longer have access to the course materials.

Support:

- Should you experience **technical problems** during this online training such as login issues, connectivity issues, or access issues, please email krista.rundiks@cdiweb.com for assistance.
- If you have questions on **module content and activities** please email one of the course facilitators at kristi.shaffer@cdiweb.com (Sales Manager) or janelle.neville@cdiweb.com (Asset Manager).
- We have also placed a **general questions** course discussion link at the top of the course where you can ask a question to the facilitators and/or group, but please know this will be visible to everyone.
- If you have a **suggestion or complaint** about the course please email yukonisd@logisticsflow.com.

Resources:

You will be provided training resources in each module that correlate with that topic. Should you need to quickly download the materials for future reference, you can do so below.

Module Content Download Links:

Please Note: you will be prompted for a password, use yukonisd.

Module 1: Training Overview (pdfs)
Module 2: Historical Information (videos | pdfs)
Module 3: Product Information (videos | pdfs)
Module 4: Quotes (videos | pdfs)
Module 5: Opportunities (videos | pdfs)
Module 6: Orders (videos | pdfs)
Module 6a: Orders (videos | pdfs)
Module 7: Data & Inventory Management (videos | pdfs)
Module 8: Reporting (videos | pdfs)
Module 9: Yukon Tips & Tricks (videos | pdfs)
Download All Module Resources

Module 1 Introduction Discussion Activity

Module 1.5: Introduction Discussion Activity

Introduce yourself to the group by answering the following 3 questions by **Thursday, July 9th**.
Note: You will start an individual post in the discussion forum by clicking on the "Add a New Discussion Topic" button below.

1. What is your name, job role, and prior experience working in Yukon?
2. What is something you would like to learn from this training?
3. What is something you like to do outside of work?

Please read your colleagues posts and an optional response to at least one person should be made by the end of day **Friday, July 10th**.

This forum allows each person to start one discussion topic.

Add a new discussion topic

(There are no discussion topics yet in this forum)

Module 2 Parent Page

Module 2: Historical Information

Welcome to Module 2 Historical Information. This module is designed to provide you an overview of the basic screens used in Yukon on a daily basis. These screens will be essential for searching information related to customers and your daily workflow activities.

📄 Module 2.0: Introduction & Learning Objectives
📄 Module 2.1: Daily Activity Screen
📄 Module 2.2: Search for Existing Customer
📄 Module 2.3: Customer Activity Page
📄 Module 2.4: Find Transaction
📄 Module 2.5: Editing a Customer Profile
📄 Module 2.6: Forecasting
📋 Module 2.7: Discussion Activity
✔️ Module 2.8: 5-Question Self Knowledge Check

Module 2 Introduction and Learning Objectives

Module 2.0: Introduction & Learning Objectives

Overview:
This module will cover the basic screens used in Yukon that are essential for searching and applying daily customer tasks.

Highlights:
- Daily Activity Screen
- Search for Existing Customer
- Customer Activity Page
- Find Transaction
- Editing a Customer Profile
- Forecasting

Objectives:

1. **Recognize** the different screens, pages, and functions highlighted in this module within the Yukon software.
2. **Assess** when you would need to use a function highlighted in this module within the Yukon software.
3. **Recall** and **apply** at least 3 areas covered in this module that are most useful for your job requirements.
4. **Complete** the discussion activity questions and self-knowledge check.

Last modified: Sunday, 12 April 2020, 10:17 PM

Module 2 Daily Activity Screen

Module 2.1: Daily Activity Screen

Overview:

In this module you can watch a video that follows an Asset Manager through their workflow using the Daily Activity screen options found in Yukon. She will start her day by accessing the fundamental Daily Activity options found in Yukon, such as:

- Open Purchase Orders
- Held
- Unallocated
- Cancellations
- Expedites
- Quotes
- Follow-ups
- Customer Returns

Video:

Click the image below to watch the Daily Activity Screen video. Please Note: you will be prompted for a password, use **yukonisd**.
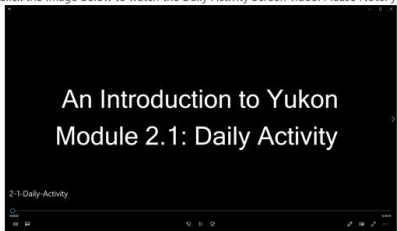
PDF Download

Module 2 Search for Existing Customer

Module 2.2: Search for Existing Customer

Overview:

This module provides a video and short tutorial that shows you how to search for an existing customer in Yukon. After you type in the customer's name in the search box you will see where you can find or edit a customer's profile such as:

- Bill To
- Ship To
- Default Branch
- Phone
- Web Site
- Primary Function
- Resale #

Video:

Click the image below to watch the video tutorial. Please Note: you will be prompted for a password, use **yukonisd**.
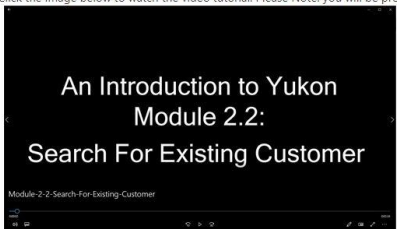
PDF Download

Click here to download a pdf information sheet for this section.

Module 2 Customer Activity Page

### Module 2.3: Customer Activity Page

Overview:

The Customer Activity page provides customer information sectioned into tabs. This module will provide a video that shows you each of these tabs and provides a general overview of how they are used. The tabs are:

- Opportunities
- Inquiries
- Quotes
- RFQ's
- Orders
- Samples
- Invoices
- Shipments
- Follow-ups
- Reserve
- Customer Notes
- Ship + Debits
- Expedites
- Customer Returns
- Customer Aging

Video:

Click the image below to watch the video tutorial. Please Note: you will be prompted for a password, use **yukonisd**.

An Introduction to Yukon
Module 2.3:
Customer Activity Page
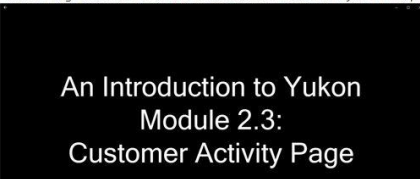
Module 2 Find Transaction

Module 2.4: Find Transaction

Overview:

In this section you will be shown how to find a transaction based on an order number from a customer quote and you can see the other transaction search parameters. Once a transaction is found the screen will provide additional information where you can click on the Trans# to take a deeper look.

In the Find Transaction screen you can search by parameters such as,

- Transaction Number
- Transaction Type
- Entity Type

Within the Transactions found table you will find the following information:

- Entity Name
- Entity
- Company
- Reference
- Date

Video:

Click the image below to watch the video tutorial. Please Note: you will be prompted for a password, use **yukonisd**.

An Introduction to Yukon
Module 2.4:
Find Transaction
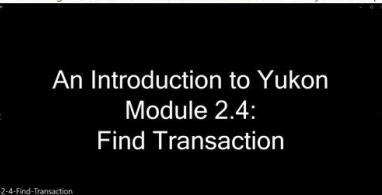
2-4-Find-Transaction

Module 2 Editing a Customer Profile

### Module 2.5: Editing a Customer Profile

Overview:

You briefly visited the Customer Profile Screen in Module 2.2 where you can view or edit information found under the Customer Info tab. Additional information is found under the following tabs:

- Shipping Locations
- Contacts
- Follow-ups
- Notes
- Statement

Video:

Click the image below to watch the video tutorial. Please Note: you will be prompted for a password, use **yukonisd**.

An Introduction to Yukon
Module 2.5:
Editing a Customer Profile

2-5-Editing-a-Customer-Profile
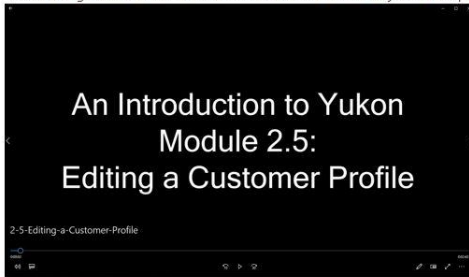
PDF Download

Click here to download a pdf information sheet for this section.
Please Note: you will be prompted for a password, use **yukonisd**.

Module 2 Forecasting

### Module 2.6: Forecasting

Overview:

In this module you will be provided an insight into the importance of forecasting for anticipated customer usage of a part and the tools offered within Yukon to help with these needs. The video demonstration will go over the following things:

- Using a High-Volume Customer's Excel Spreadsheet for Forecasting
- Replenishment Tab
    - How to manage and forecast inventory
    - Using the History Section
    - Using the Projection Section
    - Audit Screen
        - Price Changes
        - Past Parts
        - Remaining Parts in Inventory
        - Receiver and PO Number
- Inventory Ranking
- Filters
    - Order to Forecast
    - Anticipated Supply Projection
- Usage Tab

Video:

Click the image below to watch the video tutorial. Please Note: you will be prompted for a password, use **yukonisd**.

An Introduction to Yukon
Module 2.6: Forecasting
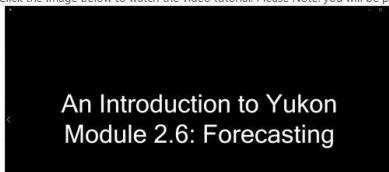
Module 2 Discussion Activity

Module 2.7: Discussion Activity

Answer the 3 questions below to the best of your knowledge by **Thursday, July 16th**. Note: You will start an individual post in the discussion forum by clicking on the "Add a New Discussion Topic" button below.

1. Describe a good use for the Customer Notes tab found in the Customer Activity screen. If you have used this before please share with your colleagues how it has helped you.
2. What is a reason you would need to edit a customer's profile?
3. List three buckets found under the Daily Activity Screen and which bucket would you prefer to look at first and why?

Please read your colleagues posts and post a response to at least one person by the **end of day Friday, July 17th**.

This forum allows each person to start one discussion topic.

Add a new discussion topic

(There are no discussion topics yet in this forum)

◄ Module 2.6: Forecasting   Jump to...   Module 2.8: 5-Question Self Knowledge Check ►

Module 2 Quiz

Question 1

Not yet answered

Marked out of 1.00

⚑ Flag question

Where can you find an order's tracking number?

Select one:
- a. In the customer's profile under the Account Info tab
- b. In the customer activity screen under the RFQ's tab
- c. In the customer activity screen under the Expedites tab
- d. In the customer activity screen under the Shipments tab
- e. In the daily activity section under the Held items

Question 2

Not yet answered

Marked out of 1.00

⚑ Flag question

Select the reason(s) you would need to Edit an Existing Customer Profile

Select one or more:
- a. Customer has a phone number change
- b. Customer moved and there is an address change
- c. Customer has a website change
- d. Customer needs to return a product
- e. Customer needs updated pricing

Question 3

Not yet answered

Marked out of 1.00

⚑ Flag question

Select the reason(s) why you would need to conduct a product Forecast

Select one or more:
- a. The customer is a high-volume customer that sends us a weekly spreadsheet of anticipated usage
- b. The customer asked to order a few more parts that we didn't have in stock, but they don't know when they will buy them and have not provided an estimated annual usage.

APPENDIX C

Module Format and Training Schedule

Module Format:

Most modules will take a week to review the content and complete the activities which entail a discussion activity with guided question prompts and will end with a self-knowledge check. *Module 6 will take 2 weeks to complete as there will be a collaborative learning challenge presented.

Please start each module on the Monday of the given week and complete your discussion post no later than Thursday of that week. Please post a reply to one of your colleagues by the end of day on Friday of that week.

You may want to re-visit the discussion board again the following Monday to see what additional posts and comments were made. If time doesn't allow, don't worry the training facilitator will send out an Announcement on Monday morning after the module was completed through the course that will highlight reoccurring themes and provide helpful summary information from your discussion for your archives.

Training Schedule:
* indicates a 2-week module.

Week 1: July 6 – 10
Module 1.0-1.5: Training Overview
Covers: 6-Question Pre-Training Survey, Overall Training Objectives & Duration, Schedule & Format, Support, Resources, Links, & FAQs, Policies, Netiquette, & Copyright, and Introduction Discussion Activity.

Week 2: July 13 – 17
Module 2.0-2.8: Historical Information
Covers: Introduction & Learning Objectives, Daily Activity Screen, Search for Existing Customer, Customer Activity Page, Find Transaction, Editing a Customer Profile, Forecasting, Discussion Activity, and 5-Question Self Knowledge Check.

Week 3: July 20 – 24
Module 3.0-3.9: Product Information
Covers: Introduction & Learning Objectives, Product Information Tab, Related Products Tab, Product Activity Screen, Part Number Search, Sales Notes, Filters, Design Registrations, Discussion Activity, and 5-Question Self Knowledge Check.

Week 4: July 27 – 31
Module 4.0-4.7: Quotes
Covers: Introduction & Learning Objectives, Open Inquiries & Turning an Inquiry into a Quote,

Generating a Quote, Send a Supplier Request, Supplier Notes, Alerts, Discussion Activity, and 5-Question Self-Knowledge Check.

Week 5: July 6 – 10
Module 5.0-5.9.1: Opportunities
Covers: Introduction & Learning Objectives, Opportunity Goals, Understanding the Process (Funnel View), Opportunity Field Definitions, Customer Opportunity Screen, Yukon Tabs Used for Opportunities, Managing Daily Workflows Using Yukon Opportunity Views, Internal Communication, Creating a Reserve, Discussion Activity, and 5-Question Self Knowledge Check.

Week 6: August 3-7
*Module 6.0-6.9: Orders
Covers: Introduction & Learning Objectives, Entering a New Customer & Ship To Information, Creating a Sales Order From a Quote, Processing a Web Sales Order, Creating a Sales Order From a Reserve, Sample Orders, Expedites, Open Sales Orders / Backlog, Export Restricted Orders, and Advanced Allocation Window.

Week 7: August 10-14
*Module 6a.1-6a.9: Orders
Covers: Note to Customer & Customer Emails, Non-cancellable & Non-returnable (NCNR) Process, Customer Returns (RMA's), Payment Terms, Handling Purchase Orders, Credit Card (CC) Orders & CC Authorization Form, Customer Tax Resale Certificates, Collaborative Learning Challenge & Discussion Activity, and 5-Question Self Knowledge Check.

Week 8: August 17-21
Module 7.0-7.8: Data & Inventory Management
Covers: Introduction & Learning Objectives, New Manufacturer / Supplier, New Parts, Price Loads, Data Sheets, Specifications, Mass Upload Requests, Discussion Activity, and 5-Question Self Knowledge Check.

Week 9: August 24-28
Module 8.0-8.6: Reporting
Covers: Introduction & Learning Objectives, How to Access Reporting, Reporting Types and Formats, Running & Scheduling a Report, Custom Reports, Discussion Activity, and 5-Question Self Knowledge Check.

Week 10: August 31 – September 4
Module 9.0-9.6: Yukon Tips and Tricks
Covers: Introduction & Learning Objectives, Action Quick Buttons, Acronyms, Opportunity Field Definitions, Filters, New Functionality, Comments, and Questions, Other Shared Tips & Tricks.

Week 11: September 7 – September 11
Module 10.0-10.3: Final Assessment

Covers: Conclusion, Additional Resources & Support, Summative 10-Question Quiz, and 6-Question Post Course Survey

APPENDIX D

Support, Resources, Links, & FAQ

During the training you can visit Module 1.3: Support, Resources, Links, & FAQs to reference and download all course material files, email course facilitators for content or IT help pertaining to your Moodle Cloud login, and have access to other resources that supplement the training content. It is a good idea to save the material from this course to your local hard drive for future reference, as a week after the course ends you will no longer have access to the course materials.

Support:

- Should you experience **technical problems** during this online training such as login issues, connectivity issues, or access issues, please email krista.rundiks@cdiweb.com for assistance.
- If you have **questions on module content and activities** please email one of the course facilitators at kristi.shaffer@cdiweb.com (Sales Manager) or janelle.neville@cdiweb.com (Asset Manager).
- We have also placed a **general questions course discussion link** at the top of the course where you can ask a question to the facilitators and/or group, but please know this will be visible to everyone.
- If you **have a complaint** about the course please email complaints@logisticsflow.com and you should receive a response within 24 hours and during normal business hours from your initial message request.

Resources:
You will be provided training resources in each module that correlate with that topic. Should you need to quickly download the materials for future reference, you can do so by re-visiting Module 1.3: Support, Resources, Links, & FAQs.

Module Content Download Links:
Please refer to the links in Module 1.3: Support, Resources, Links, & FAQs.

General Yukon Resources
These resources are not provided within the training modules but can be helpful to have as an additional resource. Please refer to the links in Module 1.3: Support, Resources, Links, & FAQs.

Other Links:
Click here to connect with the company Knowledge Base and search help articles by keywords.

FAQs:

1. **What if I have questions pertaining to learning activities that are not addressed within any module?**
   For any questions pertaining to the training please use the "General Training Questions" discussion forum located at the top of the course dashboard.

2. **What if I'm out of town and can't partake in the training for that week?**
   If you know in advance that you won't be able to participate in a module, please email one of the course facilitators at <u>kristi.shaffer@cdiweb.com</u> (Sales Manager) or <u>janelle.neville@cdiweb.com</u> (Asset Manager).

3. **What if I don't have enough time to take this training, can I reschedule?**
   You have been invited to take this training by your company or approved to take this training by someone at your company. The modules are designed to take no more than 3 hours of your time per week and the company hopes that you see value in the material and activities provided to assist with your daily job requirements. If it's too much on your weekly schedule, please contact your manager and ask for additional options or support.

4. **How will this training help with my job performance?**
   The course encompasses 6 main learning objectives that the company hopes each user of Yukon meets after they complete the training. These objectives were created based on user survey's and stakeholder requests. The hopes are that Yukon becomes easier to use and that you have the resources you need to assist you with the most efficient use of application.

<center>**APPENDIX E**</center>

<center>**Policies, Netiquette, & Copyright**</center>

Policies:

Security:
This course provides you with a secure login and password.

Accessibility:
This course adheres to ADA compliance standards for online course design and allows for navigation via keyboard only, provides alternative text on images and files, makes links descriptive, uses hierarchical headings for content sections, provides caption video and transcribed audio, presents content in multiple ways, and uses color combinations that are high contrast.

Participation:
As a participant of this training you are expected to participate in the weekly modules unless you have communicated a schedule conflict to the course facilitator. We ask this, because in order to build a community of inquiry the training requires participant commitment.

Complaints:
If you have a complaint about the course please email complaints@logisticsflow.com and you should receive a response within 24 hours and during normal business hours from your initial message request.

Support & Documentation:
Online learning objectives, duration, schedule, format, support, resources, FAQs, and an introduction is made available to participants enrolled in the course during week 1.

Netiquette:

What is Netiquette:
Netiquette, a social code that defines "good" online behavior is something to keep in mind during your training interactions. Writing may be the only means of communication you have with classmates and instructors, so it is especially important to do this effectively. Follow the guidelines below to leave your mark as a knowledgeable, respectful, and polite participant who is positioned to succeed professionally.

Be Scholarly
Do: Use proper language, grammar, and spelling. Be explanatory and justify your opinions. Credit the ideas of others through citing and linking to resources.
Avoid: Misinforming others when you may not know the answer. If you are guessing about something, clearly state that you do not know the answer.

Be Respectful
Do: Respect privacy, diversity, and opinions of others. Communicate tactfully and base disagreements on research evidence.
Avoid: Sharing another person's professional or personal information.

Be Professional
Do: Represent yourself well at all times. Be truthful, accurate and run a final spell check. Avoid: Using profanity or participating in hostile interactions.

Be Polite
Do: Address others by name or appropriate title and be mindful of your tone. Treat people as if you were in a face-to-face situation.
Avoid: Using sarcasm, being rude or writing in all capital letters. Written words can be easily misinterpreted as they lack nonverbals.

Copyright:
An Introduction to Yukon Online Training course and its contents are protected by U.S. and International copyright laws. Reproduction, distribution, and other transmission of the course or its contents without prior written permission of LogisticsFlow is prohibited. You may however use the material for your job while you are a licensed user of the Yukon software. Copyright © 2020 by LogisticsFlow All rights reserved.

APPENDIX F

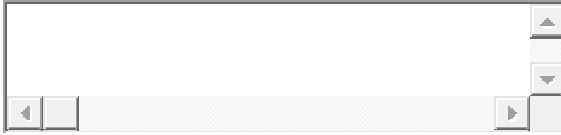**Module 1 Pre-Training Survey Questions**

1) How long have you used Yukon for your job tasks?
   - ○ 0-3 months
   - ○ 6 months - 1 year
   - ○ 1-3 years
   - ○ 3-5 years
   - ○ More than 5 years

2) What is your job role?
   - ○ Inside Sales Representative
   - ○ Field Sales Representative
   - ○ Asset Manager
   - ○ Product Manager
   - ○ Other (please specify)

   [   ]

3) Do you think an online training for Yukon will be helpful to you?
   - ○ Yes
   - ○ No
   - ○ Maybe
   - ○ I Don't Know

4) How often do you use Yukon for your job?
   - ○ Constantly
   - ○ Daily
   - ○ Weekly
   - ○ Monthly
   - ○ Not Often

5) What are you hoping to learn from this online training?

6) Please List Your Email Address:

APPENDIX G

Module 1 and 2 Discussion Activity Questions

Module 1.5: Introduction Discussion Activity

Introduce yourself to the group by answering the following 3 questions by Thursday, July 9th. Note: You will start an individual post in the discussion forum by clicking on the "Add a New Discussion Topic" button below.

1. What is your name, job role, and prior experience working in Yukon?
2. What is something you would like to learn from this training?
3. What is something you like to do outside of work?

Please read your colleagues posts and an optional response to at least one person should be made by the end of day Friday, July 10th.

Module 2.7: Discussion Activity

Answer the 3 questions below to the best of your knowledge by Thursday, July 16th. Note: You will start an individual post in the discussion forum by clicking on the "Add a New Discussion Topic" button below.

1. Describe a good use for the Customer Notes tab found in the Customer Activity screen. If you have used this before, please share with your colleagues how it has helped you.
2. What is a reason you would need to edit a customer's profile?
3. List three buckets found under the Daily Activity Screen and which bucket would you prefer to look at first and why?

Please read your colleagues posts and post a response to at least one person by the end of day Friday, July 17th.

APPENDIX H

Module 2 Self-Knowledge Check Questions

Question 1
Where can you find an order's tracking number?
Select one:
a. In the customer's profile under the Account Info tab
b. In the customer activity screen under the RFQ's tab
c. In the customer activity screen under the Expedites tab
d. In the customer activity screen under the Shipments tab
e. In the daily activity section under the Held items

Question 2
Select the reason(s) you would need to Edit an Existing Customer Profile
Select one or more:
a. Customer has a phone number change
b. Customer moved and there is an address change
c. Customer has a website change
d. Customer needs to return a product
e. Customer needs updated pricing

Question 3
Select the reason(s) why you would need to conduct a product Forecast
Select one or more:
a. The customer is a high-volume customer that sends us a weekly spreadsheet of anticipated usage
b. The customer asked to order a few more parts that we didn't have in stock, but they don't know when they will buy them and have not provided an estimated annual usage.
c. There is no stock available on a low usage part
d. Because the Replenishment Tab under the Manufacturer in Yukon says we have a lot of usage on a part and we are running low on parts
e. All of the above are reasons to Forecast

Question 4
Select the bucket(s) below that are listed in the Daily Activity Screen:
Select one or more:
a. Supplier Quotes
b. Special Pricing
c. Expedites
d. Held
e. Payment Terms

Question 5
Select the reason(s) why you would need to use the Find Transaction tool

Select one or more:

a. To look up the customer's credit card number

b. To find a quote so you can create a sales order from it

c. Because the manufacturer sent an email answering a customer's question on a quote request and you need to follow-up in the system

d. To find an opportunity so you can create a reserve
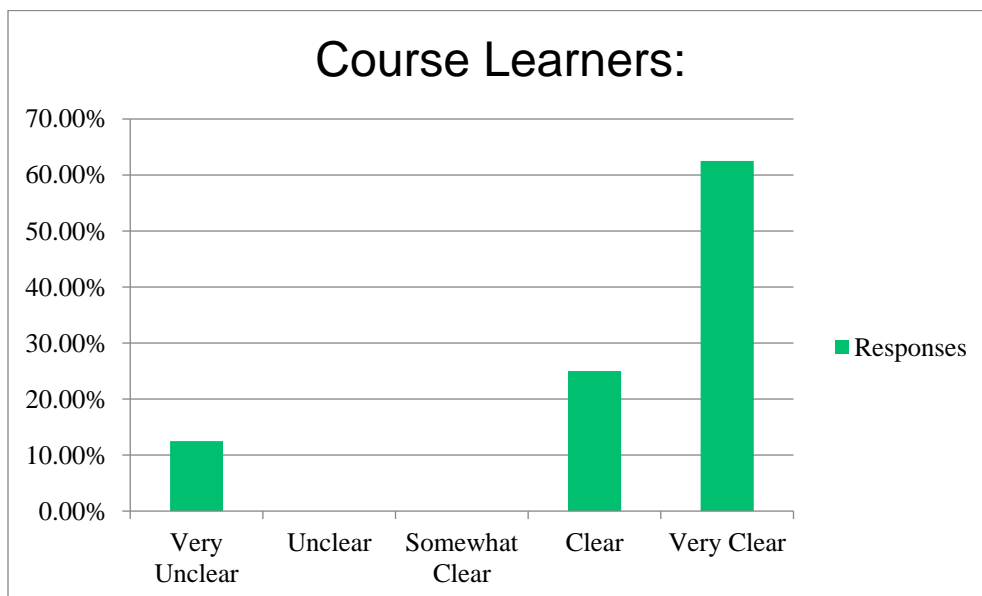
e. To edit the customer's bill and ship to address

APPENDIX I

eLearning Course Design Survey Link

After watching the final course presentation, please rate how clear the following course

components were:

Course Learners:

Answer Choices	Responses	
Very Unclear	12.50%	1
Unclear	0.00%	0
Somewhat Clear	0.00%	0
Clear	25.00%	2
Very Clear	62.50%	5
	Answered	**8**
	Skipped	**0**

Course Need:

Answer Choices	Responses	
Very Unclear	0.00%	0
Unclear	0.00%	0
Somewhat Clear	0.00%	0
Clear	25.00%	2
Very Clear	75.00%	6
Answered		**8**
Skipped		**0**

Course Need:
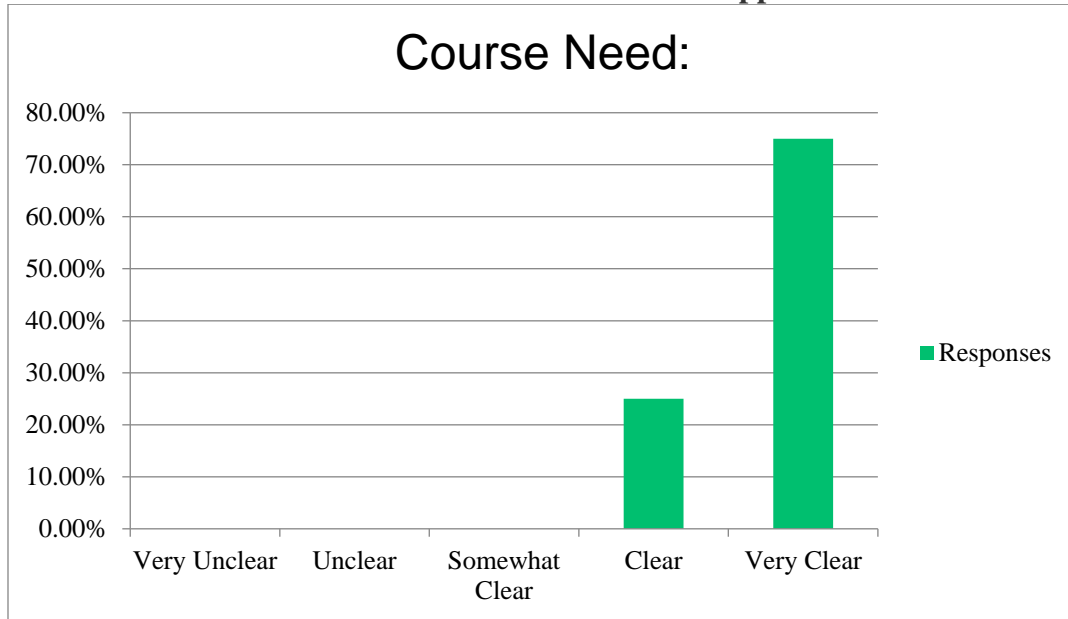
Overall Course Objectives:

Answer Choices	Responses	
Very Unclear	0.00%	0
Unclear	0.00%	0
Somewhat Clear	0.00%	0
Clear	37.50%	3
Very Clear	62.50%	5
Answered		**8**
Skipped		**0**

Overall Course Objectives:
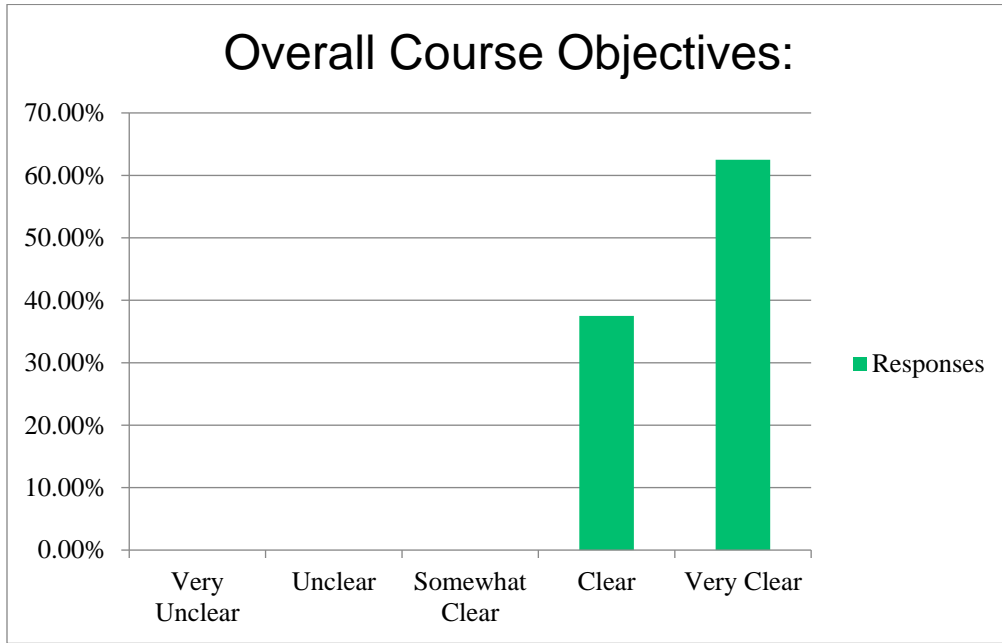
Course Platform and Format:

Answer Choices	Responses	
Very Unclear	0.00%	0
Unclear	0.00%	0
Somewhat Clear	0.00%	0
Clear	25.00%	2
Very Clear	75.00%	6
Answered		**8**
Skipped		**0**

Course Platform and Format:
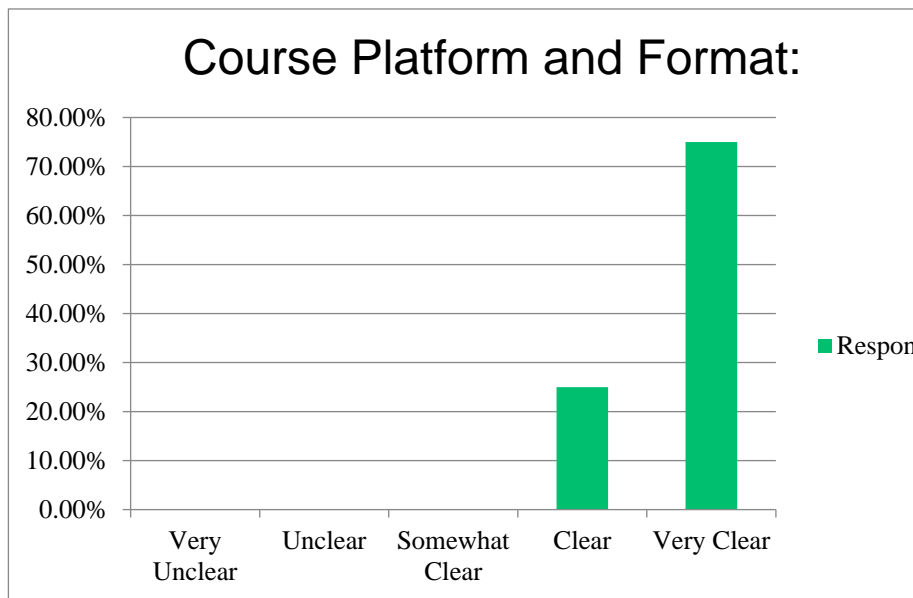
Learner Support:

Answer Choices	Responses	
Very Unclear	0.00%	0
Unclear	0.00%	0
Somewhat Clear	0.00%	0
Clear	25.00%	2
Very Clear	75.00%	6
	Answered	**8**
	Skipped	**0**
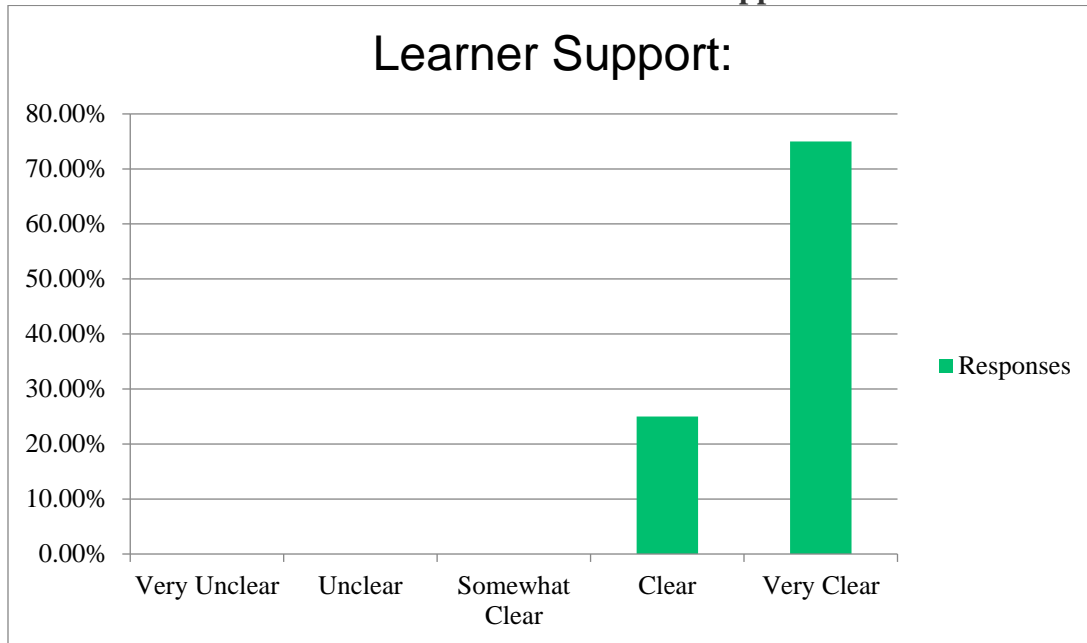
What is one thing you liked about this course design?

	Answered	**7**
	Skipped	**1**

	Respondents	Response Date	Responses
1	PM	May 07 2020 04:33 PM	I like the overall easy to navigate layout of the course
2	PM	May 07 2020 04:04 PM	well organized
3	PM	May 07 2020 03:53 PM	I liked the incorporation of Survey Monkey into the course, and the downloadable PDFs, and reinforcement of video with PDF, and the repetitive structure with discussions and knowledge checks after the content.
4	PM	May 07 2020 02:24 PM	Attractive and clean and organized

5	May 07 2020 03:18 AM	Strong connection with client's product and learner needs.
6	May 07 2020 02:12 AM	How organized the course was, specially when using Moodle Cloud. Also, how you displayed the content.
7	May 07 2020 01:56 AM	i really liked the design of your moodle. I have struggled with a good "look" for mine but you nailed it!

**Do you have any suggestions that would help improve this course?**
Answered   5
Skipped   3

Respondents	Response Date	Responses
1	May 07 2020 04:33 PM	It's good as is. Thank you
2	May 07 2020 03:53 PM	I would like to see bigger text.
3	May 07 2020 03:18 AM	The use of text was very effective. Maybe consider slightly increasing font size.
4	May 07 2020 02:12 AM	Not at the moment! Great job :)
5	May 07 2020 01:56 AM	No, i think it was presented nicely

APPENDIX J

Course Presentation
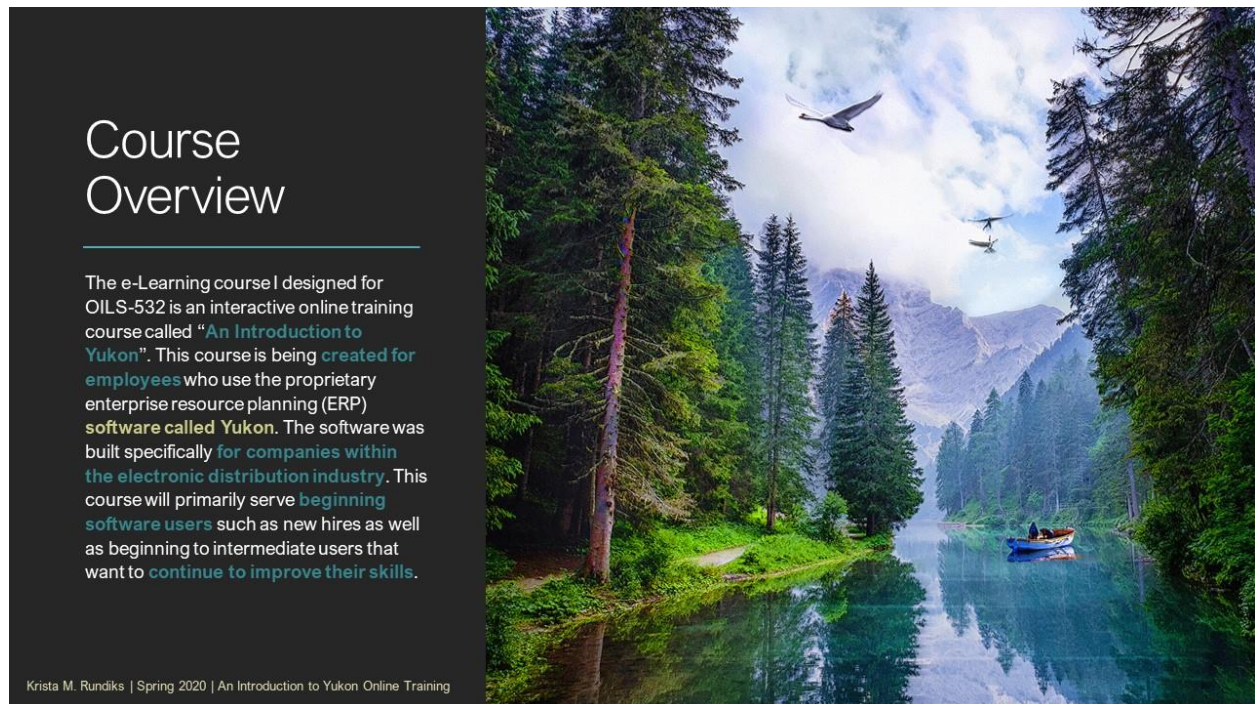
Course Audience

The learner analysis helped to identify 5 primary Yukon users for the online training. These consist of manager, inside sales representative, field sales representative, high-level decision maker, and other. 3 course facilitators who are advanced users of the software will help engage a community of inquiry (CoI) enabling learners to form an individual understanding of the information through a socio-cultural and collaborative context.

Krista M. Rundiks | Spring 2020 | An Introduction to Yukon Online Training

Course Need

Over the past 15 years the training for the software has been conducted in a "learn as you go" approach and primarily performed face-to-face by an employee with a similar job role. The ERP software has evolved over a decade and there has been minimal formal training created or follow-up support provided other than employees who have used Yukon for some time and take a leadership or mentor role.

Krista M. Rundiks | Spring 2020 | An Introduction to Yukon Online Training

Learner Needs

After surveying 39 employees and stakeholders I found the main topics of the course needed to cover the following 8 software uses:

- Historical Information
- Product Information
- Quotes
- Opportunities
- Orders
- Data and Inventory Management
- Reporting
- Yukon Tips and Tricks

Krista M. Rundiks | Spring 2020 | An Introduction to Yukon Online Training

6 Overall Training Objectives

Recognize the different types of Yukon tasks that support various processes within the electronic distribution sales channel.

Apply basic Yukon operating procedures when accessing historical and product information, dealing with quotes, opportunities, and orders.

Evaluate and state the best way to handle a given customer scenario by relating it back to the module information provided.

Express and discuss learning gaps or concerns pertaining to each module.

Recall information in a self-knowledge check at the end of each module.

Identify and use Yukon resources and support material for future use.

Krista M. Rundiks | Spring 2020 | An Introduction to Yukon Online Training

Course Platform

The content produced for this eLearning course design is built in the **free version of Moodle Cloud**. The format is primarily asynchronous, linear, and employs the use of socio-cultural, constructivism, and cognitivist learning theories. It includes **10 learning modules** and requires a minimum of **1-3 hours of work a week**, runs for 2 in a half months, and will provide up to **20 hours** of training content.

Krista M. Rundiks | Spring 2020 | An Introduction to Yukon Online Training

Usability Testing

There were **three users who tested the prototype**. The pilot testers were provided instructions with how to login and start the course. They were sent an email with:

Course URL:
https://yukonisd.moodlecloud.com
Username: testuser
Password: testuseryukonisd2020!

Some updates were made based on tester feedback such as including a **Welcome and Start Here** module that will include a course walk-through video. Video scripting and production enhancements and updates to quiz question wording will take additional time with SMEs.

Krista M. Rundiks | Spring 2020 | An Introduction to Yukon Online Training

Course Evaluation

The training will include **formative evaluation** as it will start with a short **5-question pre-course survey** that will help the facilitator gage a learner's experience level with Yukon. A **summative evaluation** will be applied at the very end of the training through a **10-question quiz** covering all the training information and a **5-question post-course survey**.

Krista M. Rundiks | Spring 2020 | An Introduction to Yukon Online Training

Course Evaluation Plan

After concluding the first course a **working session** will be held with stakeholders and facilitators to address the facilitator needs and observations. To gain additional learner insight, the instructional designer will ask a couple learners if they would be amenable to **a follow-up interview** about their experience with the course.

The primary two key questions are:
Is this an effective online training course to teach Yukon software concepts?
How can this training be improved for future iterations?

eLearning Course Design Survey Link

HTTPS://WWW.SURVEYMONKEY.COM/R/L5HDMRS

Explore The Course:

You can test the course with the information below:

Course URL: https://yukonisd.moodlecloud.com
Username: testuser
Password: testuseryukonisd2020!

Krista M. Rundiks | Spring 2020 | An Introduction to Yukon Online Training