K•edtech

CONTENT DEVELOPMENT AND EVALUATION STRATEGY

August

2025

Prepared by: Katie Harshman
BUS 516 HR Learning & Development

SECTION 1: RELIABLE SOURCES FOR HIGH-QUALITY CONTENT

To develop high-quality training content for our CRM rollout, we are relying on two key sources:

- **Open Educational Resources (OER)**
- **Internal Subject Matter Experts (SMEs)**

These sources were chosen based on their availability, credibility, relevance to our goals, and flexibility to meet learner needs.

Reliable Sources for High-Quality Content

Open Educational Resources (OER)

OER materials are openly licensed, allowing k-edtech to reuse, revise, remix, and redistribute content. These are ideal for foundational topics like CRM theory, customer engagement, and digital tools.

Using platforms like **LibreTexts** or **OpenStax**, we can locate video tutorials, articles, and case studies, then adapt them to reflect our specific CRM setup.

Why OER?

- Cost-effective, peer-reviewed, and customizable
- Promotes educational equity and social responsibility
- Reduces development time while increasing instructional quality
- Can be adapted to meet accessibility standards (e.g., alt-text, captions)

Example Use Case

We might adapt an OER video series explaining the core concepts of customer lifecycle management and pair it with internal CRM walkthroughs. Another example is embedding OER guides on data handling into the onboarding path for new hires.

Reliable Sources for High-Quality Content

Internal Subject Matter Experts (SMEs)

SMEs from our sales and customer service teams have firsthand experience with the CRM platform and its integration into our daily workflows.

Their insights ensure that training is **realistic, up-to-date, and aligned with how the platform will be used.**

Why SMEs?

- Deep product and process knowledge
- Credibility among peers
- Ability to identify common user pain points
- Help personalize training with specific examples tailored to k-edtech.

Example Use Case

SMEs will create brief video demos, for example, "How to log a client call" and practical guides tailored to different roles. They may also contribute to building an internal CRM FAQ, based on their hands-on experience with the system and employee feedback during testing.

SECTION 2: CONTENT FOR DIVERSE LEARNER GROUPS

At k-edtech, our staff varies by age, digital fluency, department, and learning preferences, so our CRM training must be inclusive, flexible, and engaging for everyone. We're applying principles from Universal Design for Learning (UDL) and differentiated instruction to design for variability from the start.

Each employee will be given access to resources based on their role (sales, support) and digital confidence level. We will use a blended model that combines:

- **Self-paced learning modules**
- **Live virtual or in-person workshops**
- **Interactive practice environments**
- **Peer mentoring and discussion boards**

Content for Diverse Learner Groups

TAILORING FOR LEARNER DIFFERENCES

Age and Experience

- New or less tech-savvy employees will receive slower-paced training with tutorials and coaching. Experienced users can skip basics and focus on advanced CRM tools.

Learning Styles

Content will be presented to learners in a variety of formats:

- **Visual learners:** videos, infographics
- **Readers:** written guides, flowcharts
- **Hands-on learners:** simulation sandbox environments
- **Verbal learners:** live workshops, discussion boards

Product Differentiation

To demonstrate understanding, learners can choose to:

- Submit a screen recording completing a task
- Write a quick-start guide for a teammate
- Perform a CRM task in real time during a workshop

Content for Diverse Learner Groups

Accessibility, Language, and Digital Literacy Considerations

- **Language:** All videos will include captions and transcripts. Plain language will be used throughout, supported by a glossary of CRM terms.
- **Disabilities:** All content will meet digital accessibility standards (screen reader compatible, alt-text for visuals, keyboard navigation).
- **Digital Literacy:** We'll offer short "how-to" platform tutorials and just-in-time help desk support to make sure no one is left behind.

Real-World Examples of Engagement

- A sales rep enters a new lead in a simulated CRM and receives feedback.
- A support agent practices resolving a common client issue using a guided walkthrough.
- Staff apply the content immediately in role-specific tasks, which boosts both retention and confidence.

SECTION 3: METRICS AND TOOLS TO EVALUATE SUCCESS

We'll use both formative and summative evaluation methods to track training effectiveness and identify improvement areas, and two measurable metrics: Skill application rate and support ticket reduction.

1. **Skill Application Rate:** Tracks real-time CRM usage—e.g., number of completed tasks, data entry accuracy, or lead follow-up rates.
2. **Support Ticket Reduction:** Monitors post-training CRM-related help requests. A decline in support tickets will show increased confidence and system fluency.

Metrics and Tools to Evaluate Success

Tools for Data Collection

- **Pre- and Post-Assessments:** Evaluate knowledge before and after the training.
- **Pulse Surveys:** Collect learner feedback during training to address issues quickly.
- **End-of-Training Survey:** Gathers self-reported confidence and satisfaction.
- **CRM System Analytics:** Monitors logins, task completion time, and user behaviors.

These tools help us answer questions like: Are learners engaged? Do they understand the material? Can they use their new knowledge confidently?

Using the Data to Improve

- If assessment scores are low, we'll revise that section or offer follow-up resources.
- If support tickets stay high, we'll create additional tutorials or hold refresher sessions.
- you Positive results (e.g., higher task completion rates and learner confidence) indicate that the training strategy is working.

THANK YOU!

By continuously reviewing and adjusting based on these metrics, we can ensure the CRM rollout is a success, and that employees are confident, efficient, and supported in their transition.