Design Document

Training Title: Vetracon AR Account Hold Training

Business Goal and Problem	**Goals:** • Analysts apply an account hold within 2 business hours of a buyer return, without team lead direction, and prior to initiating contact with the buyer. • New hires can demonstrate correct hold behavior within their first 30 days. • Team leads have a reference to use in coaching. • Case audit results show hold compliance at or above 95% within 90 days of training rollout. **Problem:** AR Operations analysts are not consistently applying account holds when a payment is returned, exposing Vetracon to unnecessary financial risk. Without an account hold, new orders may continue to accrue and could result in further delinquency. A review of 30 returned payment cases found that 11 had no hold applied at any point during the resolution period. A 60-day review period revealed an increase of 47% in risk exposure, with three buyers becoming delinquent in both the original and unblocked orders. Analysts hired in the last 12 months are three times more likely to skip or delay the hold than tenured peers. When interviewed about the process, AR analysts demonstrated an inconsistent understanding about when a hold applies, who can remove it, and whether it affects all order types or only new credit. Behavior ranges from applying a hold within hours, to waiting for direction, to skipping the hold entirely and going straight to buyer outreach. **Root Cause Analysis:** No formal training exists on the returned payment process. The process steps live in an SOP that was last updated 18 months ago and does not reflect current system workflows. New hire onboarding covers high-level AR concepts but does not include a returned payment module. The account hold step specifically is described in one sentence with no context about why it matters, when exceptions apply, or what happens downstream if it is skipped. **Possible Solutions:** 1. A short e-learning course, supported by a job aid and a team lead coaching guide. This addresses the knowledge gap, puts an accurate and current reference in the analyst's hands, and gives team leads something consistent to coach toward. (Recommended) Please note: Training has been mandated at this time and will be implemented. There is, however, merit to examining whether a systems solution could be implemented that alerts AR analysts whenever a returned payment occurs on an account they are responsible for. The alert can clearly outline the next steps and even link to a job aid or updated SOP for reference. This could be done in addition to a micro-learning solution.

Target Audience	The primary audience is AR Operations analysts who process buyer payments daily, with a focus on the analysts hired within the last 12 months. The secondary audience is the team leaders who, though they may not take the course, will have both a course and job aid to point AR analysts toward.
Learning Objectives	**Terminal LOs:** **TLO 1: Apply an account hold independently as the first action upon notification of a returned payment, before initiating buyer outreach.** **Enabling LOs:** **ELO 1:** Articulate the steps and conditions of the account hold procedure.
Training Recommendation	**Delivery Method:** E-learning developed in Articulate Storyline 360 and published to the LMS as a SCORM 1.2 package. A one-page account hold job aid will be provided for use by both the AR analysts and as a coaching reference for team leaders. **Approach:** The course material is not complex, outlining a two-step process with a single caveat/dependency. On the one hand, a job aid might be sufficient. Because, however, compliance has been an issue for a variety of cultural and procedural issues, a short, experiential eLearning scenario will potentially have a larger impact. **Assumptions and dependencies:** Compliance to AR holds seems to be a combination of a lack of confidence on the part of AR analysts that they have permission to place buyer accounts on hold. There may also be some cultural issues of compliance at play as some AR team leads seem to be following localized exception processes rather than the company policy. This course is designed to bolster AR analysts' confidence in the policy and leave no room for ambiguity: a returned payment results in an immediate hold.

Training Time	Target time: 5 – 8 minutes for the brief course, including a 3-question final assessment. A note on scope. The brief asks for microlearning, but the deliverables it specifies (multiple interactive elements, multimodal delivery, practice and application opportunities, and assessment, make a short storyline course the best option for development.
Deliverables	Design document (this document). Storyboard with full script and interaction detail. Articulate Storyline 360 source file. Recorded voiceover audio files with matching caption files. Visual assets built to Vetracon external brand standards Account hold job aid (one page PDF, printable). Measurement plan mapped to Kirkpatrick levels 1 through 4.
Training Outline	Welcome Navigation instruction Introduction / Goals (presents the learning objective and connects to background knowledge) Scenario (A buyer return example that demonstrates the problem) The Hold Process: The key learning explanation, showing what should have happened in the scenario Interactive Scenario: A chance for the learner to apply the hold process and download the job aid. Assessment: Three questions, 100% required Conclusion: Congratulating the learner and reminding them to download the job aid.
Assessment Plan	**Level 1 Assessment:** A brief (3-6 questions) post-course survey that ascertains the students' attitude toward the training and its usefulness. **Level 2 Assessment:** A single, scenario-based practice is provided as a low-stakes assessment. A final three-question quiz (with a 100% requirement for passing) will be provided to assess process knowledge. **Level 3 Assessment:** Conduct the same process review and team lead observation over a 60-day window (after training), and compare the results with the pre-training process cycle. **Level 4 Assessment:** Repeat the tracking of risk exposure from orders approved on accounts with unresolved returns, comparing a 60 day window after rollout against the baseline from the original review window.