The following template was created for corporations to use at the course and/or unit level. The template was created with a broad scope in mind and so may be used to accommodate a fully traditional classroom, 100% virtual classroom, or a blended learning format.

- The first page of the template will help you think through the overall course including course goal, learning objectives, timeline and course introduction.
- The following pages (unit templates) breakdown the course by unit.
- The unit templates provide opportunities to think through facilitation strategies and resources that may be leveraged before writing out the description.
- Each unit template includes an assessment section. Depending on the length of each unit, you may to do an assessment at the conclusion of each unit, after every few units or you may choose to only doing an assessment at the end of the course.
- The unit templates also provide space at the end to list any additional resources that may be referenced. Such as web addresses or publications.
- Both the overall course template and progressive unit templates provide space to identify key skills and competencies developed. Considering these skills and competencies throughout the course design may help create focus for the course work as well as assessment.
- The final page of this template is meant to guide you in mapping out a meaningful conclusion to the course. This section does not need to be elaborate, but should recap or review key learning points.
- Keeping the end goal in mind, some may choose to complete the introduction *and* conclusion pages before beginning the unit templates.

**Course Name:** Appointment and Portfolio Basics **Date:** 05/02/2013

Overall Goal of Course:

Once course is complete trainees will be able to conduct a client appointment where they present the Portfolio Tool and make a recommendation.

Skills/Competencies Developed:

Portfolio Tool use and application; Portfolio Analysis; Presentation Skills; Communication; Relationship Building

| Learning objective(s): | Corresponding Unit(s): |
|---|---|
| LO1: Trainees will learn how to use the Portfolio tool: | Unit 1 |
| LO2: Trainees will learn how to analyze Portfolio reports: | Unit 2 & 3 |
| LO3: Trainees will learn how to present Portfolio reports and make recommendations | Unit 2 & 3 |
| LO4: | |

Delivery Method:

- ☐ Virtual
- ☐ Classroom
- ☒ Blended
- ☐ Other

Learning Timeline:

- Week 1: Complete Unit 1 on own
- Weeks 2 -4: Complete Unit 2 with mentor
- Week 5: Attend class to complete Unit 3

## Introduction:

Introductions/Icebreaker activity:

Trainer will host synchronous WebEx session to introduce resources and timeline and outline purpose and objectives of course. Instructor and trainees will provide brief introductions at the beginning this WebEx.

Purpose Statement:

•What is the overall all goal of this course? Why is it relevant?

At the conclusion of this course, trainees will feel confident in using the portfolio tool, analyzing portfolio reports and presenting their findings and recommendations to clients.

Review Course Objectives and Agenda:

• Review course agenda and pre-view when objectives will be covered and which competencies/skills will be developed.

| | | |
|---|---|---|
| LO1: Trainees will learn how to use the Portfolio Tool: | Unit 1 | Week 1 |
| LO2: Trainees will learn how to analyze Portfolio Reports | Unit 2 & 3 | Weeks 2-4 |
| LO3: Trainees will learn how to present results to clients: | Unit 2 & 3 | Week 5 |

Set Class Expectations:

• Discuss learning etiquette, participation expectations, logistics and technology or resources that will be used to add in learning, etc.

-Instructor will introduce and pre-view LMS system through desktop sharing. Instructor to explain that this is where virtual learning will occur and where they will learn about all other systems and tools (portfolio)

-Discuss etiquette and expectations while training in mentor's office

**Note:** If there is any pre-work that ties into this course, review this at some point during the introductions when it makes sense. Typically this will work well when intermingled with the purpose statement or Course Objectives.

**Course Name:** Appointment and Portfolio Basics **Unit:** 1 **Date:** 05/02/2013

## Learning objective(s):

LO1: Trainees will learn how to use the Portfolio Tool

## Skills/competencies developed:

Portfolio Tool use and application

## Timing: (when will training occur)

Week 1 (asynchronous)

- [x] Virtual
- [ ] Traditional Classroom
- [ ] In-field training
- [ ] Self Study

## Facilitation Strategies:

- [ ] Ice breakers
- [ ] Socratic Method
- [ ] Brainstorming
- [ ] Small group activity
- [ ] Role-playing
- [ ] Story-telling
- [ ] Mind-mapping
- [ ] Case study
- [x] Other Online simulation

## Instruction Channel:

- [ ] Instructor Led Classroom
- [ ] Virtual Instructor Led Training
- [ ] WebEx
- [ ] Video
- [ ] Online research
- [ ] Audio (i.e. Podcast)
- [x] Learning Module (i.e. Articulate)
- [ ] individual coaching/mentoring
- [ ] Participant Resource Guide
- [ ] PowerPoint
- [x] Supporting PDFs
- [ ] Other ___________

## Description:

Trainees will view an Articulate module, "Portfolio Basics", which demonstrates how to open the Portfolio Tool and input information. The module will also demonstrate how to generate reports and provide explanation on how to read the reports. Throughout the module, trainees will be required to demonstrate retention of skill through online simulation.

## Assessment:

- [ ] Survey
- [ ] Open-ended evaluation
- [ ] Pre- and post testing
- [ ] Oral exam
- [ ] Class participation
- [ ] Observed
- [ ] Skill demonstration
- [x] Simulation
- [ ] Other ___________

## Additional Resources:

A PDF file will be made available at the conclusion of the module. The PDF will provide basic step-by-step instruction around how to use the Portfolio Tool as well as accompanying screen shots. Trainees may print the PDF and reference it as they continue to get comfortable with the Portfolio Tool.

**Course Name:** Appointment and Portfolio Basics **Unit:** 2 **Date:** 05/02/2013

## Learning objective(s):

LO2: Trainees will learn how to analyze Portfolio reports

LO2: Trainees will learn how to present Portfolio reports and make recommendations

## Skills/competencies developed:

Portfolio Tool use and application; Portfolio Analysis; Presentation Skills

- ☐ Virtual
- ☐ Traditional Classroom
- ☒ In-field training
- ☐ Self Study

## Timing: (when will training occur)

Weeks 2-4 (asynchronous)

## Facilitation Strategies:

- ☐ Ice breakers
- ☐ Socratic Method
- ☐ Brainstorming
- ☐ Small group activity
- ☐ Role-playing
- ☐ Story-telling
- ☐ Mind-mapping
- ☐ Case study
- ☒ Other Field observation and guided application

## Instruction Channel:

- ☐ Instructor Led Classroom
- ☐ Virtual Instructor Led Training
- ☐ WebEx
- ☐ Video
- ☐ Online research
- ☐ Audio (i.e. Podcast)
- ☐ Learning Module (i.e. Articulate)
- ☒ individual coaching/mentoring
- ☐ Participant Resource Guide
- ☐ PowerPoint
- ☒ Supporting PDFs
- ☐ Other ___________

## Description:

Over the course of weeks 2-4, at the direction of their mentor, trainees will create portfolio reports for clients. Once reports are created trainees will work with their mentor to analyze reports and solidify recommendations. Finally, trainees will observe their mentor present Portfolio reports and recommendations during client appointments. They should complete this process at least once per week.

## Assessment:

- ☐ Survey
- ☐ Open-ended evaluation
- ☐ Pre- and post testing
- ☐ Oral exam
- ☐ Class participation
- ☒ Observed
- ☐ Skill demonstration
- ☐ Simulation
- ☐ Other ___________

## Additional Resources:

As needed, reference the PDF provided at the completion of Unit 1.

**Course Name:** Appointment and Portfolio Basics **Unit:** 3 **Date:** 05/02/2013

## Learning objective(s):

LO2: Trainees will learn how to analyze Portfolio reports

LO3: Trainees will learn how to present Portfolio reports and make recommendations

## Skills/competencies developed:

Portfolio Tool use and application; Portfolio Analysis; Presentation Skills; Communication Skills, Relationship Building

## Timing: (when will training occur)

Week 5 (synchronous)

- ❑ Virtual
- ☒ Traditional Classroom
- ❑ In-field training
- ❑ Self Study

## Facilitation Strategies:

- ❑ Ice breakers
- ☒ Socratic Method
- ❑ Brainstorming
- ☒ Small group activity
- ❑ Role-playing
- ❑ Story-telling
- ❑ Mind-mapping
- ☒ Case study
- ❑ Other___________

## Instruction Channel:

- ☒ Instructor Led Classroom
- ❑ Virtual Instructor Led Training
- ❑ WebEx
- ❑ Video
- ❑ Online research
- ❑ Audio (i.e. Podcast)
- ❑ Learning Module (i.e. Articulate)
- ❑ individual coaching/mentoring
- ❑ Participant Resource Guide
- ❑ PowerPoint
- ☒ Supporting PDFs
- ❑ Other ___________

## Description:

Instructor should begin by reviewing Portfolio case-study with class. Use the Socratic Method to create discussion around what should be considered. Once all considerations have been discussed, break the class into groups of three for Portfolio input. Once all reports are generated bring class back together for group discussion around analysis and recommendation. Pull from class for idea sharing around was observed during appointments. How did their mentors present reports, build relationships, make recommendations, etc.?

## Assessment:

See conclusion

- ❑ Survey
- ❑ Open-ended evaluation
- ❑ Pre- and post testing
- ❑ Oral exam
- ☒ Class participation
- ☒ Observed
- ☒ Skill demonstration
- ❑ Simulation
- ❑ Other ___________

## Additional Resources:

- A PDF outlining the Portfolio Case Study will be provided to each trainee at the beginning of class.
- As needed, reference the PDF provided at the completion of Unit 1.

**Course Name:** Appointment and Portfolio Basics **Date:** 05/02/2013

## Conclusion:

Review Course Objectives and Agenda:

• Review course key learning points and competencies/skills developed.

Assessment of LO2 & LO3: Prior to the conclusion of the Unit 3 trainees will go back to their original case-study groups for role-play. Each trainee will role-play their Portfolio presentation appointment from beginning to end including rapport building, explanation of Portfolio Reports, Q &A and recommendation. Trainees will take turns playing the advisor, client and observer. At the end of each role-play the trainee playing the advisor will self assess and then the observer will provide additional feedback. Instructors will rotate through training center to observe role-plays.

Conclusion: Once role-plays are concluded, all trainees will come back together for a final opportunity to ask questions and conclude discussion with review of learning points.

Set expectations for follow up:

•Discuss and gain commitment for any action items or follow-up

Gain commitment from class to complete online class evaluation before leaving the training center.

Assessment:

- [x] Survey
- [ ] Open-ended evaluation
- [ ] Pre- and post testing
- [ ] Oral exam
- [x] Class participation
- [x] Observed
- [x] Skill demonstration
- [ ] Simulation
- [ ] Other ____________