

Claims Total Loss (TTL) Adjuster Module Project

Project Charter (version 1.0) 6-18-2x

Business Need / Problem Statement

We currently train total loss (TTL) automobile claims adjusters side-by-side over four days with subject matter experts. The descriptions of these processes, workflows, tasks, and procedures largely can be found in text format in the CSD Wiki. Unlike for other Claims role training, there are no focused, text-based documents (“modules”) that binds together these disparate TTL tasks to form a cohesive text-based training. Modular training for other roles has proven to be more efficient, allowing for more focused one-on-one learning with experts and providing learners re-access to learning materials. There are also no assessments created to evaluate learners in the TTL training process.

Proposed Solution

In **Phase 1** (June-August) we propose to develop a focused TTL Module (document) that binds together TTL tasks using links to the Wiki or other procedural instructions job aids on SharePoint. The module would not create or modify instructions of any task, workflow, or procedure as these documents are owned fully by Claims or other departments. The TTL module would have the same design as existing training documents for other roles, containing learning objectives, a similar tone, and divisions into sections roughly in the order in which the (TTL) adjuster would work a claim. At the completion of Phase 1, the learner will know the expectations of performance based on learning objectives but will not have any practice or assessment yet.

In **Phase 2** (September-December) we propose to review each section and add activities and exercises as in the other Claims modules, for learners to practice and assess their own competency. The goal is to create enough practice to enable learners to self-evaluate their own competency in meeting the learning objectives. The activities could be in the form of scenarios, dealing with conventional claims situations that could help bring together several TTL tasks into a few customer experience stories. However, learners would need access stable data in the portals and databases used by TTL Adjusters if manipulation of these tools is critical. This may require the team to interface with IT. Several checkpoints where learner activities are reviewed by a trainer/subject matter expert would enable management to know where to concentrate coaching efforts.

The desired outcome of this project is to produce a multi-section document with practice activities such that the learner can work through all the steps of the TTL process competently and meet the learning objectives. A checklist may be used to cue learners in the sequence. Ideally learners will have practiced the steps of the checklist along the way and will have reached competency in each task. A final assessment may be part of the training.

When completed, the Claims Department will have full ownership of the source document(s) in Word and the user working documents (pdfs) for maintenance and revisions going forward.

Audience Information

The primary audience for the TTL Module is new employees hired to be total loss adjusters. The Module may also serve as a reference for current TTL adjusters who may need a review.

Project Goals (High level)

1. Consult with a supervisor on the expectations of a good TTL customer experience, and with subject matter experts on details, to create a series of sections/lessons which bind together the processes, workflows, and tasks of the TTL claims process, in the approximate order in which a claim would be worked.
2. The multi-section document is saved as a pdf with links to the Wiki or other locations containing task or workflow instructions. We will work with the SharePoint admin for Claims to help this get posted and the links established.
3. Activities and exercises (practice, with feedback), together with staff review of checkpoint activities enable both the learner and management to evaluate progress towards competency.

Learning Objectives (High level, topics adjustable)

Topic	Objective
Introduction	Learners can describe what total loss means at PEMCO, how a TTL adjuster becomes involved in a claim, and how we want policyholders and other customers to experience the TTL process. Learners can roughly describe the layout of the whole module, the sections that will be covered, and the key outcomes expected in each section.
1. Initiating the Total Loss Process	Learners can navigate through the processes of file setup, best practices, lost transportation cost, rental vehicles, storage, tow yards, IAA salvage, WA leased vehicles, and comparative negligence.
2. Communication	Learners can navigate through the processes initiating customer contact, sending official letters such as Claimant Contact, No Contact, or Offer; handling non-contact procedures, and cite best practices in leaving voicemails.
3. Evaluating and Negotiating TTL	Learners can navigate through the processes of vehicle valuation and condition, adjusting receipts, handling custom equipment and any previous damage, authority level requests, evaluation reports, escalation of offers, and a negotiation work plan.
4. Salvage	Learners can navigate through the processes of salvage handling and completing processing and payments in our system.
5. Payment and Closure	Learners can navigate through making a total loss payment to customer or lienholder, processing total loss closure, TD420 and NMVTIS salvage reporting, and creating a total loss policy update.
6. Other Tasks	Learners additionally may need to navigate police holds, mariner claims, and 35 day OR or WA letters

Evaluation Strategy

The efficacy and quality of the module might be evaluated through a claims TTL new hire survey administered after the last part of the TTL module is completed. More importantly, the assessments of learners in going through the sections of the module should reveal that they have reached the desired level of performance. Assessments and coaching sessions based on assessment results (formative evaluation) will enable management/coaches to track and support learners as they work the module. Some form of summative (end) evaluation, where learners extract data and manipulate databases and forms is anticipated.

Project Scope

In Scope – L&OD will:

- Write the text that connects the tasks and procedures together at a high level perhaps using a scenario (continuing scenario)
- Manage the project, including a kickoff and project close (with lessons learned).
- Communicate weekly with key stakeholders about project progress and challenges.
- Partner with SMEs to identify what learners need to know to perform tasks at the level of competency for the learning objectives.
- Establish with SMEs several scenarios and partly-worked problems to facilitate learning, as well as scenarios for a post-implementation evaluation of solution effectiveness.
- Pilot the module with 1-3 learners (end users), gather data, and tweak the learning assets.
- Establish with the business unit what metric will be measured to evaluate the quality and usability of the module, how the data will be gathered, and how that data will be used to inform the change of learning assets. Claims will own the learning materials and modify them as needed based on this data.

Out of Scope – L&OD will not:

- Create or modify job aids or procedures describing how specific tasks are to be done.
- Make changes to learning objectives after approval unless all parties (including the L & OD manager) agree to an extension of the timeline, which SMEs are available, and the L & OD project lead has bandwidth to do so.
- Invite learners directly to take online learning, except for piloting.
- Manage or create work processes and workflows for clients; that is the responsibility of the business units.
- Create scenarios, practice problems, or assessments without the support of a SME.
- Resolve conflicts between SMEs should a question of content inclusion or accuracy arise.
- Be responsible for the accuracy of assessment questions without timely SME review.
- Post or store job aids or documents for the client unless explicitly arranged in this charter.
- Manage or modify learning assets in the future as procedures change (except for eLearning)
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Implementation Strategy

Delivery Method	Links to materials like job aids or instructions in the Wiki will be incorporated into the pdf. Partnering with Claims SharePoint admin to upload materials to SharePoint, similar to how other modules have been done. Claims subject matter experts should be on hand to coach the learner through key milestone assessments.
Hosting Location	Claims SharePoint site. Raw files for editing will be passed to Claims for future maintenance.

Project Team Roles and Responsibilities

Name	Role	Description
Chadwick Clifton	L&OD sponsor (Mgr, L & OD)	Provides guidance, removes roadblocks, reviews and approves final deliverables .
Reita John	Claims sponsor	Supports the project by championing the business need, vision, and direction; allocates resources when required; clears roadblocks to progress. Reviews and approves objectives, project documents, changes in timeline or content, and approves final deliverables .
Angeline Ludwig	L&OD core training advisor, co-project manager	Works in tandem with designer to facilitate content acquisition, setting learning objectives, reviewing materials, managing the project, and serving as key contact with Claims Department.
Rolanda Ho	Instructional design and project management	Needs assessment, design, development, and plan for delivery and evaluation; project management (tracking and timeline adherence). Link to project progress and documents [fake link in this example]
Albertine Friend	Primary subject matter expert unless unavailable	Provides content including problem-based scenarios, screenshots and assessment scenarios if used. Reviews and approves objectives, and final draft of deliverables. Invited to collaborate with secondary SME to help establish content but remains the main contact with the design team.
Micaela Huskey	Secondary (backup) subject matter expert; becomes primary if other SME unavailable.	Provides backup if primary SME unavailable. Provides content including problem-based scenarios if used, screenshots and assessment scenarios. Invited to collaborate with primary SME to help establish content, but primary remains the main contact with the design team.
Glendora Oliveira	Primary supervisor expert unless unavailable	Provides high level, customer experience expectations for TTL, of the introduction and the framework of the module (e.g. scenario-based, etc.) content where SMEs cannot. Reviews and approves objectives, initial project documents, changes in timeline or content, and reviews deliverables. Invited to collaborate with secondary supervisor SME to help establish content but remains the main contact with the design team.
Deana Shipley	Secondary supervisor expert unless primary is unavailable	Provides backup if primary SME unavailable . Provides high level, customer experience expectations for TTL, of the introduction and the framework of the module (e.g. scenario-based, etc.) content where SMEs cannot. Invited to collaborate with primary supervisor SME to help establish content; primary remains main contact with design team.

Project Plan/Detailed Training Plan

A link to a more specific training plan or schedule will appear here if we chose to go this route.

Milestones/Schedule

PHASE 1: Crafting the Text and Shell of the Lessons

Activity/Milestone	Due Date (Week beginning)	Status
Kickoff meeting with team	Week 1: 6/13	Complete
Final approval of charter (24 hrs review)	Week 2: 6/17	
Initial meetings with supervisor to development introduction	Week 2: 6/17	Planned
Final approval of introduction	Week 3: 6/24	
Meetings and Appvl with SME on Section 1: Initiating Total Loss	Week 4 & 5 : 7/1, 7/8	Planned
Sign off on format and style of Section 1 by Sponsors	Week 6: 7/15	
Meetings with SME on Section 2: Communication	Week 6: 7/15	
Final approval of Section 2	Week 6: 7/15	
Meetings with SME on Section 3: Evaluation and Negotiation	Week 7: 7/22	Planned
Final approval of Section 3	Week 7: 7/22	
Meetings with SME on Section 4: Salvage	Week 8: 7/29	
Final approval of Section 4	Week 8: 7/29	
Meetings with SME on Section 5: Payment and Closure	Week 9: 8/5	Planned
Final approval of Section 5	Week 9: 8/5	
Meetings with SME on Section 6: Other Tasks	Week 10: 8/12	
Final approval of Section 6	Week 10: 8/12	
Final revisions	Week 11:8/19	Planned
Final approval of project sponsors	Week 11:8/19	
Posting of deliverables and testing	Week 12:8/26	
Deliverables go live with first (pilot) learner	Week 12:8/26	
End of phase 1, lessons learned	Week 12:8/26	

	1	2	3	4	5	6	7	8	9	10	11	12	
Starting	Jun 10	Jun 17	Jun 24	Jul 1	Jul 8	Jul 15	Jul 22	Jul 29	Aug 5	Aug 12	Aug 19	Aug 26	
Launch	Kickoff	Charter appvd 6/19											
Development	Introduction		1 Initiate TTL			Phase 1: Craft the Text							
	Frame content sections and intro with Supe SME	Write + 1 cycle rvsn w SME											
	20-Jun	7/26 EOD draft review due	Content mtg w SME	Write, 1 cycle rvsn, spsnr appvl		2 Communication							
			7/2 9AM	7/5 EOD draft review due	Content mtg w SME	Write + one cycle rvsn w SME							Sponsor final approval milestone
					7/16 9AM	7/18 EOD draft review due	Content mtg w SME	Write + one cycle rvsn w SME			4 Salvage		
							7/23 9AM	7/25 EOD draft review due	Content mtg w SME	Write + one cycle rvsn w SME	5 Pymt & Closure		
Conclusion								8/6 9AM	8/8 EOD draft review due	Content mtg w SME	Write + one cycle rvsn w SME	6 Other Tasks	
						Sponsor approval milestone				8/20 9AM	8/22 EOD draft review due	Final revisions	
						7/17/2019						8/8/2019	Post & Test
Vacations				Carla 6/5-6/12						Carla 8/1-8/9			
			Darcy 6/28-7/5							Darcy 7/29-8/9			
		Molly 6/27-6/28					Molly 7/19				Molly 9/13		
				Patty 7/1-7-12								Patty 8/5-8/16	

Phase 2: Assessments and Performance Evaluation

	1	2	3	4	5	6	7	8	9	10	11	12	13	14
Starting	Sep 2	Sep 9	Sep 16	Sep 23	Sep 30	Oct 7	Oct 14	Oct 21	Oct 28	Nov 4	Nov 11	Nov 18	Nov 25	Dec 2
Launch	1 Initiate TTL													
Development	Content mtg w SME	Write, 1 cycle rvsn, spsnr appvl				2 Communication	Phase 2: Activities & Assessments							
		Eric on vacation across these weeks		Content mtg w SME	Write + one cycle rvsn w SME			3 Eval & Negotn						
								Content mtg w SME	Write + one cycle rvsn w SME					
			Sponsor review, approval milestone							Content mtg w SME	Write + one cycle rvsn w SME			
												5 Pymt & Closure		
											Content mtg w SME	Write + one cycle rvsn w SME	6 Other Tasks	Sponsor final approval milestone
Conclusion												Content mtg w SME, Summative Assessment	Post & Test	Finl Appvl
													Go Live	Project Close, Lessons Learned
Vacations		Eric 9/6-9/13												
		Curt sometime 9/2-9/15					To be completed							

Assumptions and Dependencies

- Stakeholders will provide content and process documents as well as scenarios relevant to helping learners bridge the performance gap.
- The project lead updates the team on project progress in team meetings and/or by email. Approvals of deliverables may be made by email.
- Feedback and approval requests are **met with quick turnarounds** (24 hrs. or less). A “no response” will be deemed as approval. If longer turnaround times are unavoidable, the project may be delayed.
- SMEs initially provide all desired changes to content, then review the draft once for accuracy only; the draft then is considered final pending leadership approval.
- ID has early access to the relevant documents, tool, or system in which the user/learner works.
- The learning content stabilizes (if still being figured out) before development of learning materials.
- Subject matter experts with overlapping expertise confer and decide on the content before the primary SME meets with the designer.
- Stakeholders provide screenshots of the system and/or allow the ID to capture all of the screens or states of the system that the user will see.
- Stakeholder provides scenarios and mock user data (if relevant) to allow the ID and learner to work that scenario in the system, or replacement data for every field where personal information shows.
- If any of the dates or dependencies cannot be met, the project is subject to delay.

Major Reviews and Approvals (Instructional designer doesn't appear in approvals)

PHASE 1

Charter	Role	Dates Approved
Bediaiaiko Halquer	Claims Department Sponsor	
Achãampong Smubor	L & OD Department Sponsor	
Kāw Javprok	L & OD Trainer, co-project manager	
Ya Lekonzeel	Supervisor expert	
Ebubo Samumba	Primary subject matter expert	
Arkurful Transerlane	Secondary subject matter expert	
Sia Gwix	Instructional designer	
Training Plan (if produced)	Role	Dates Approved
Bediaiaiko Halquer	Claims Department Sponsor	
Achãampong Smubor	L & OD Department Sponsor	
Completion of Unit 1 Phase 1	Role	Dates Approved
Kāw Javprok	Claims Department Sponsor	
Ya Lekonzeel	Primary supervisor expert	
Ebubo Samumba	Primary subject matter expert	
Arkurful Transerlane	L & OD Trainer, co-project manager	
Final Phase 1 & Delivery Plan	Role	Dates Approved
Bediaiaiko Halquer	Claims Department Sponsor	
Achãampong Smubor	L & OD Department Sponsor	
Kāw Javprok	L & OD Trainer, co-project manager	

PHASE 2

Completion of Unit 1 Phase 2	Role	Dates Approved
Bediaiako Halquer	Claims Department Sponsor	
Achãampong Smubor	Primary subject matter expert	
Kãw Javprok	L & OD Trainer, co-project manager	
Final Phase 2 & Delivery Plan	Role	Dates Approved
Bediaiako Halquer	Claims Department Sponsor	
Achãampong Smubor	L & OD Department Sponsor	
Kãw Javprok	L & OD Trainer, co-project manager	

Project documents, progress charts, and this charter can be reviewed on our SharePoint [Claims TTL Module](#) site.