



Talent Development Plan

Navigating Tough Customer Conversations

Disclaimer: Veylora is a fictional organization created for this portfolio sample. Any resemblance to a real organization is unintended.

Client: Veylora

Prepared by: Sublimify LLC

Opportunity / request summary

Field	Details
Client	Veylora, Customer Support Operations
Request source	Elena, Customer Support Operations Manager
Request date	Existing project intake; exact date not established in the reviewed record
Plan date	October 14, 2026
Request type	Behavioral performance improvement and talent development
Engagement duration	Eight-week accelerated delivery, with operational sustainment afterward
Approved scope	R-01 scenario-based e-learning; R-02 resolution and escalation decision aid; R-03 supervisor reinforcement and coaching guide

Summary

Following Sublimify's Behavioral Front-End Analysis (BFEA), Veylora approved an integrated response to inconsistent difficult-interaction handling. The plan combines focused branching-scenario practice with point-of-need policy guidance and supervisor reinforcement. It targets observable resolution and escalation decisions without assuming that training alone caused or will resolve all customer-experience concerns.

1. Business context and problem

Veylora's Customer Support Operations reports concerns involving difficult customer conversations, resolution accuracy, de-escalation, escalation decisions, and customer satisfaction. In a selected July–August 2026 QA sample of 32 interactions across eight representatives, the 24 difficult interactions averaged 74.1% QA versus 100% for eight routine interactions; the overall sample average was approximately 80.5%, compared with the established 85% overall passing standard.

Criterion averages were 46.9% for de-escalation, 60.9% for resolution accuracy, 65.6% for ownership/communication, and 75% for escalation judgment/handoff. Sixteen of 24 sampled difficult interactions involved supervisor assistance: eight classified as policy-supported, five potentially premature, and three indeterminate. These selected observations are not workforce-prevalence estimates.

August 2026 CSAT was 81.4% against an 88% reference target; NPS was 42.3 in Q4 2025 and 26.8 in Q3 2026 quarter-to-date. Formal complaints totaled 217 over September 2025–August 2026. These indicators establish business concern, not proof that a single representative behavior caused the reported changes.

The facilitated frontline validation demonstrated one specific policy-application issue: RepB initially considered supervisor involvement solely because a customer requested a manager, despite a verified \$45 duplicate billing charge falling within the documented \$75 frontline correction limit. RepB reached the policy-consistent interpretation after consulting the escalation matrix. This finding directly supports policy-based decision practice and quick-reference performance support; it does not establish a workforce-wide knowledge deficiency.

2. Talent development goal

Enable Veylora Customer Support Representatives to apply customer-resolution and escalation standards reliably when conversations become difficult, using realistic scenario practice, accessible point-of-need references, and consistent reinforcement through existing supervisory touchpoints. Evaluate success through demonstrated decisions, subsequent QA observations, and broader customer-experience trends, with attribution limits explicitly recognized.

3. Strategic alignment

Business objective	Target behavior / learning outcome	Measurement method
Improve difficult-interaction service quality	Acknowledge concern, verify facts, choose an authorized resolution, explain next steps and maintain ownership.	Branching-scenario decision criteria; comparable difficult-interaction QA criteria.
Improve appropriate escalation judgment	Distinguish customer anger or a manager request from a policy-defined trigger; choose frontline, lead or supervisor action with rationale.	Scenario decision records; case-level escalation review and policy classification.
Support customer experience goals	Apply accurate, policy-consistent resolutions and clear communication during challenging cases.	CSAT relative to 88% reference target; complaints per 1,000 interactions; qualitative feedback.
Sustain correct application at work	Consult decision aid and apply the same rules during work; discuss select cases with supervisor when useful.	Job-aid usability task; normal QA and coaching notes; supervisor feedback.

Project-specific improvement percentages and mastery thresholds will be set during assessment specification and accepted by Elena. The 85% existing QA passing standard applies to overall QA, not individually to every criterion.

4. Theoretical and methodological framework integration

Framework / principle	Application to Veylora
Performance-driven backward design	Work backward from observable resolution and escalation decisions to outcomes, evidence, scenarios, and assessments.
BFEA and human performance improvement	Preserve the distinction between demonstrated decision breakdowns and unvalidated explanations of wider QA changes.

Framework / principle	Application to Veylora
Cognitivism and cognitive load	Present brief policy-relevant information in meaningful chunks with clear prompts; eliminate decorative complexity.
Constructivism and experiential learning	Use authentic customer cases with realistic choices, consequences, and justified next steps.
Behaviorism, retrieval and spaced reinforcement	Use immediate explanatory feedback, revised attempts, and follow-up prompts in existing coaching practices.
Andragogy and relevance	Give working representatives autonomy and practical problems drawn from their decision environment.
Mayer multimedia principles	Use concise narration/text, signaling and coherent visuals; avoid redundant on-screen reading and unnecessary animation.
Agile / successive approximation	Build a thin interactive prototype, obtain Jordan's content review, pilot, refine, then deploy.
Kirkpatrick-informed evaluation	Separate satisfaction (L1), scenario decisions (L2), observed practice (L3), and business indicators (L4).

5. Program design and implementation

Program overview

Phase	Focus	Key activities	Tools
1. Orientation	Set decision expectations	Brief context on difficult interactions, standards and business concern; baseline scenario.	LMS, Outlook, Confluence
2. Guided practice	Build applied judgment	Branching scenarios on de-escalation, billing resolution, ownership and escalation; corrective feedback.	Storyline 360 AI; LMS

Phase	Focus	Key activities	Tools
3. Application	Support point-of-need use	Practice selecting the correct authority and documentation action in a safe case simulation; use decision aid.	ResolveDesk case environment; Confluence; job aid
4. Reinforcement	Sustain target decisions	Reusable two-to-five-minute case prompts through existing coaching, selective Slack reminders.	Supervisor guide; Slack; Zoom as needed
5. Evaluation	Review and refine	Collect scenario outcomes, QA feedback and usability issues; adjust content through controlled reviews.	LMS reports, CRM/QA, Confluence

Approved deliverables

ID	Deliverable	Acceptance intent
R-01	Interactive e-learning: Navigating Tough Customer Conversations	Accurate branching decisions, practice feedback, accessible delivery, tracked completion and assessment.
R-02	Customer resolution and escalation decision aid	Concise policy-aligned decision sequence that can be consulted during work.
R-03	Supervisor reinforcement and coaching guide	Minimal-preparation case prompts and observation cues aligned to the same decisions.

6. Delivery tools and digital ecosystem

Tool / platform	Role in plan	Implementation guardrail
Veylora LMS (existing platform)	Deliver e-learning, report completions and assessment performance.	Confirm SCORM/xAPI and accessibility support before publishing; do not assume a separate LRS.
Microsoft Outlook	Launch, access and stakeholder review messages.	Use established internal distribution lists and avoid sensitive customer details.
Confluence	Authoritative policies, approved job aid, supervisor guide, collaborative documentation and version control.	Link to CS-POL-014 and SOP-CS-006; assign document owner.
Slack	Brief operational coordination and optional case-reinforcement reminders.	No customer or employee identifiers in public channels.
Zoom	SME review, short stakeholder checkpoints, pilot debrief or supervisor orientation.	Use only when an asynchronous review is insufficient.
Veylora ResolveDesk CRM (proposed case-management name)	Case notes, customer issue handling, closure and escalation workflow; safe fictional case screens for practice.	System name and detailed functions are planning definitions, not previously verified production capabilities.
ChatGPT and Claude	Assist with drafting, critique, scenario variants and QA checklists.	Only approved, de-identified inputs; human verification and approval before release.
Articulate Storyline 360 AI	Build branching e-learning, assessments, feedback and standards-compatible package.	Test with actual LMS; validate interactions and accessibility.
Adobe Creative Cloud	Create illustrations, visual assets, icons and layout elements.	Follow Veylora visual identity and asset licensing; provide alt text where appropriate.

Data and governance: The CRM identity and LMS vendor were not confirmed in the source documents. ResolveDesk is a project-level naming assumption to support solution planning, subject to operational confirmation. An xAPI/LRS architecture is optional and must not be presented as operational until its support is verified.

7. Learning experience architecture

Proposed e-learning architecture, to be validated during solution specification. Target self-paced seat time: approximately 35–45 minutes, excluding optional review. Page IDs are design identifiers, not evidence that the pages have been built.

M01 | Recognize the difficult-interaction decision

- Module ID: M01
- Seat time: 7 minutes

Performance context

- Section ID: M01-S01
- Page ID: M01-S01-P001
- Page type: Context / orientation
- Page ID: M01-S01-P002
- Page type: Diagnostic scenario

M02 | De-escalate and establish ownership

- Module ID: M02
- Seat time: 10 minutes

Respond to frustration

- Section ID: M02-S01
- Page ID: M02-S01-P001
- Page type: Micro-explanation
- Page ID: M02-S01-P002
- Page type: Branching customer dialogue

Verify the concern

- Section ID: M02-S02
- Page ID: M02-S02-P003
- Page type: Guided application

M03 | Resolve or escalate correctly

- Module ID: M03
- Seat time: 14 minutes

Authority and escalation

- Section ID: M03-S01
- Page ID: M03-S01-P001
- Page type: Policy decision tool
- Page ID: M03-S01-P002
- Page type: Branching billing dispute

Multi-condition cases

- Section ID: M03-S02
- Page ID: M03-S02-P003
- Page type: Escalation trigger challenge
- Page ID: M03-S02-P004
- Page type: Decision feedback and debrief

M04 | Document, reinforce, demonstrate

- Module ID: M04
- Seat time: 9 minutes

Close and document

- Section ID: M04-S01
- Page ID: M04-S01-P001
- Page type: CRM case simulation
- Page ID: M04-S01-P002
- Page type: Independent performance challenge

Transfer

- Section ID: M04-S02
- Page ID: M04-S02-P003
- Page type: Job aid / action commitment

Practice feedback: Each consequential choice receives short, specific feedback explaining why the action is appropriate or inappropriate under policy, followed by a chance to revise.

The final challenge requires an independent choice and rationale. The R-02 aid remains accessible, and R-03 reinforcement revisits the same cues after deployment.

8. Tracking and data integration model

Learning action	Tracked output	Use
Starts and completes module	LMS enrollment/completion and completion date	Participation and access monitoring
Selects scenario action	Choice and mapped decision criterion, where LMS/package supports it	Identify applied-decision patterns; inform feedback revision
Completes final performance challenge	Criterion-level results and final disposition	Learning evidence, not live-work proof
Uses policy aid in pilot task	Observed correct reference and outcome	Job-aid usability and clarity
Applies expected decisions in live cases	Selected QA/coaching observations with case-level safeguards	Transfer evaluation independent of course telemetry

Minimum viable data flow: Storyline package → Veylora LMS reporting → authorized L&D/operations review → comparison with existing QA and CRM measures. If the LMS and an approved LRS support xAPI, record meaningful decision statements; otherwise use available SCORM/LMS tracking. We do not claim that LMS interaction data alone establishes reduced complaints or improved CSAT.

9. Evaluation and continuous improvement plan

Level	Evaluation focus	Method	Timing / owner
1. Reaction	Relevance, clarity and usefulness	Three-to-five-item post-course pulse and qualitative comment	At completion; Sublimify / LMS
2. Learning	Accurate application of resolution, ownership and escalation criteria	Comparable pre/final scenario decisions and criterion-level results	During course; Sublimify

Level	Evaluation focus	Method	Timing / owner
3. Behavior	Transfer into sampled difficult customer cases	Established QA criteria, documented case reviews and brief supervisor prompts	30–90 days post-launch; Jordan / operations
4. Results	Customer-experience and operational movement	Comparable difficult-interaction QA, complaint rates per 1,000 interactions, CSAT, classified assists	Monthly / quarterly after launch; Elena
Optional ROI	Cost and benefit plausibility	Compare implementation/support costs against demonstrated operational gains when data permit	Only if needed; Elena

Review cadence: Use the eight-week delivery window for pilot and initial evaluation. Transfer longer-term monthly QA and quarterly content checks to Veylora. Existing QA is a selected sample and future comparisons require consistent case criteria and denominators; broader business movements may have multiple causes.

10. Roles and responsibilities

Role	Responsibility
Elena Customer Support Operations Manager	Business sponsor and approval authority; establish service-coverage allowances and approve success measures and deployment.
Jordan Senior Customer Support Lead	Operational SME; validate scenario decision rules, policy alignment, coaching prompts and pilot interpretation.
Sublimify L&D consultant and course developer	Design, author, test, revise and hand off R-01–R-03; maintain traceability to BFEA evidence.
Designated supervisors	Use R-03 during existing coaching practices and identify meaningful transfer observations.

Role	Responsibility
Frontline representatives	Participate in rollout and selected pilot feedback; apply the decision aid and documented policy.
LMS / IT administrator (as assigned)	Validate LMS package compatibility, access controls, launch tracking and technical release.
Operations / QA reporting owner (as assigned)	Supply comparable post-deployment QA and customer-experience measures.

11. Strategic value and expected outcomes

- **Applied judgment:** More consistent recognition of relevant facts, policy authority, and escalation triggers during assessed difficult customer scenarios.
- **Operational enablement:** Less decision uncertainty at the point of need through the R-02 policy-aligned aid.
- **Reinforcement:** A low-preparation R-03 approach to revisit decisions and support transfer within normal supervisory work.
- **Measurement discipline:** Distinct evidence for completion, applied practice, observed workplace behavior, and customer-experience trends without unsupported attribution.
- **Sustainability:** Veylora-owned references, coaching prompts and update triggers tied to authoritative procedures.

12. Example learning and performance flow

Stage	Learning focus	Method	Tools / output
Orientation	Why difficult interactions require policy-consistent judgment	Brief context and baseline question	LMS / Outlook
Guided practice	Acknowledge, verify and de-escalate	Branching dialogue with explanatory feedback	Storyline 360 AI
Decision challenge	Choose remedy, authority and escalation level	Independent case choices then coached retry	Storyline / R-02 decision aid
Application	Close and document customer interaction	Safe ResolveDesk-style case simulation	CRM case representation / SOP

Stage	Learning focus	Method	Tools / output
Reinforcement	Review judgment and alternatives	Short supervisor case prompts using normal coaching	R-03 / Confluence / Slack
Evaluation	Check learning and transfer	Assessment, QA, customer-experience review	LMS, QA/CRM reports

13. Delivery schedule and decision controls

Window	Planned milestone	Gate
Week 1	Confirm specifications, LMS compatibility, measures and reviewers	Elena accepts scope and success criteria.
Weeks 2–4	Produce design prototype, branching scenarios, job aid and coaching guide	Jordan approves policy accuracy; accessible prototype tested.
Weeks 5–6	Pilot full package and address critical findings	Scenario/technical usability and release readiness accepted.
Weeks 7–8	Launch, orient supervisors, report initial results and handoff	Elena authorizes rollout; Veylora accepts ownership.
30–90 days later	Monitor QA and customer indicators as part of operations	Compare cautiously; log learnings and update content as needed.

Approval and evidence: Recommendation R-01–R-03 has been approved. The delivery dates, LMS vendor, CRM name, xAPI support, new mastery targets and resource assignments are design/implementation decisions, not pre-existing confirmed project facts.