**Mobile Technology Plan**

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**Workplace environment:**

Employees work in a corporate business environment that is both remote and in-office. The line of business is focused on insurance products. Information will need to be available for a remote learner on demand. There are corporate hubs where employees travel into the office to work together periodically, with most departments coming into the locations 4-5 days per month.

**Problem:**

The line of work is the insurance industry, and the company has a product portfolio that includes both investment planning services, life insurance products, homeowners’ insurance, and car insurance. The problem that many individuals who are both new to the company or who have only worked in a specific line of business for their entire time at the company is a lack of fundamental insurance product knowledge. There needs to be courses available for employees to understand the different products that are offered and what the benefits are of each of the products. A great example would be understanding the various life insurance products that are sold and what type of coverage they offer. The knowledge needed is not company-specific but rather the insurance industry in general.

**Target audience:**

The target audience for this course will be individuals who are employed in a corporate setting. The primary level of employees completing the course would be anywhere from entry-level to higher professional technical roles. The educational levels could range from high school diploma to college level and beyond.

**Purpose(s):**

The purpose of the training will be to provide a foundational level of understanding of each of the life insurance products that are offered. There needs to be an understanding of the product to provide the service that is needed to meet the customer's needs.

**Goals:**

1. Each of the employees should understand the products that are offered, which they are immediately responsible for supporting, and be able to share the overarching product details with a customer or agent.

**Mobile technology or technologies needed to launch the plan:**

I have started researching a solution to this problem and have identified a large trade networking organization that provides insurance industry knowledge in the way of courses or training. These offerings are called Industry Advantage. The Industry Advantage courses are created, maintained, and offered through the Life Insurance Marketing and Research Association (LIMRA). The courses are offered through an app and would be available to employees on-demand to learn about the various products. The app includes tracking and can show completion rates for employees.

**Ethical dilemmas that could challenge the implementation plan and an explanation of how you will address the challenges using best practices:**

There are always ethical considerations when using mobile technology. One consideration that is consistently addressed with each vendor my company does business with is exchanging our company data or insights. There needs to be clear lines drawn where no company information is passed to the vendor and that would need to hold for those individuals that would be using the mobile technology. Another consideration is that of ensuring the privacy of the users. There could be data taken from those using the app if there are any breaches that occur.

I found an article that talked about scenarios as a defense mechanism for ethical issues with using mobile technologies. It was said that developing possible scenarios of what could occur and then the action that one would take if that were to happen, would be a possible combat to the issues that have the potential of happening (Adams, et. al., 2013). I think there could be a positive and negative of sharing these scenarios that are created. This could be a way of showing my executive team that I have thoroughly considered the potential downside to the technology and some plans could be put in place for those situations. On the other hand, showcasing the issues could make people less inclined to say, yes to the technology.

**How will you implement the mobile technologies plan in the workplace environment?**

To implement the plan, I would start by working with our vendor management team to get a contract signed for us to use and be able to legally partner with LIMRA. After the contracts are established, I would segment out a small pilot group of employees from various skill-level roles to be part of a test group to try out the courses. I would then determine a learning progression that the employees would work through. A draft of a communication plan would need to be approved by my upper leadership to roll out the pilot. The test group would be asked to download the app on their mobile device. Each individual in the pilot would need to complete the courses that were identified and outlined for them. The group may be given a window of time to complete the outlined courses and provide feedback to the oversight team. The feedback would be in a survey form with questions that are both qualitative and quantitative to collect valuable insights in hopes of understanding if the training filled the knowledge needs of the learners. The tracking of when the employees are completing the courses on their mobile devices would be needed to understand when they are accessed and how long they spend completing the training.

**The steps in the process, including how you will obtain approval from the administration if needed.**

I would need to obtain approval from executive leadership to establish a working relationship with the vendor. Some contracts would need to be drafted and signed. Part of the process with contracts would be incorporating our legal team to review and understand what types of commitment we are signing on for with this vendor. Once the contracts are approved by legal, they will go to the executive group for final signoffs. There may need to be a roadshow or presentation created to give the executive team an overview of the vendor, discuss the product they are offering, and the implementation plan for execution of the business engagement.

**References**

Andrews, T., Dyson, L. E., & Wishart, J. (2013). Supporting practitioners in implementing mobile learning and overcoming ethical concerns: A scenario-based approach. *QScience Proceedings*, *2013*(3), 10.