

Before Opening

Design rationale and evaluation plan

Sarah McLean / Self-directed workplace concept / 8 October 2026

Audience and learning task

Customer-support representatives must respond when product facts and delivery expectations conflict. In this fictional Northline call, Lena is preparing to open Juniper Cafe on Monday. The call begins Friday at 9:10 a.m. She has received the wrong filter and wants to know whether an earlier Monday estimate is confirmed.

Performance objective. Given the case evidence and fictional policy, the learner verifies both item codes, explains uncertainty in plain language, corrects any earlier misleading statement, obtains authorization before submitting a stock check, and agrees to an owned callback.

The facts the experience must preserve

Verify the mismatch. The order and packing slip say FX-12; the carton says FX-21. FX-12 is unavailable in local stock.

Keep commitments accurate. The email's Monday ETA confirms neither transfer acceptance nor delivery. A stock check asks about availability; it does not reserve or ship a part.

Request permission, then act. The learner asks; Lena explicitly says yes; a separate Submit action simulates the authorized request. Asking alone submits nothing.

Distinguish the times. After authorization, 11:30 is a status target and may remain pending. The representative owns an 11:45 callback even without a warehouse reply. Without authorization, no check or new status target exists.

Objective, practice and feedback

Observable behavior	Practice	Feedback and evidence
Verify relevant facts	Choose a focused code question instead of rushing action or requesting a broad retelling.	Lena supplies both codes; coaching explains the effect of the chosen question.
Explain uncertainty	Interpret the Monday email and distinguish warehouse status from a delivery commitment.	Lena's response exposes unsupported certainty; guidance identifies the factual distinction.
Repair and take ownership	Respond to earlier choice history and name an owned callback.	Conditional feedback addresses the actual shortcut; a learner can recover during the conversation.
Obtain authorization	Ask before the check, read Lena's explicit agreement, then select Submit.	The case record reflects the authorized action. Clear, recovered and unresolved outcomes summarize the handling.

Make the decisions visible

Character portraits and speech panels give Lena's dialogue a distinct place on the screen. Coaching is separated from the customer response. The persistent case record and available Case Facts reference keep codes and status within reach, so decisions focus on applying evidence rather than recalling it.

The Northline job aid follows Verify / Explain / Ask / Own. Worked language supports the next call. The ending asks the learner to rehearse an 11:45 callback when the warehouse still has no answer and compare it with the reference. This is an unscored rehearsal; the native course does not automatically assess a typed response.

Development and review

The script, functional HTML prototype and published Storyline course were reviewed separately. Automated prototype checks cover 36 decision sequences. Native review has sampled clear, recovered and unresolved routes, consent and restart. Case Facts opening, closing and focus return were checked by keyboard. These checks do not establish exhaustive native coverage.

The final Storyline release was reviewed on 8 October 2026. Its complete Web export is included with this portfolio; deployment of that copy remains to be verified. Selected desktop checks passed; full native accessibility validation remains pending. [Current accessibility notes](#).

Proposed validation and pilot

Before organizational use, an operations subject-matter expert would validate the authorization rule, product facts, status target, callback commitment, permitted remedies and escalation path. The fictional case would then be adapted to approved local policy.

A proposed fresh-case observation rubric would assess:

Evidence. Uses the available item facts and identifies what still needs verification.

Accuracy. Explains uncertainty and corrects the specific unsupported claim, if one occurred.

Authorization. Explains the action and its limits; waits for explicit permission before submission.

Ownership. Names an appropriate callback owner and time, including what happens when information is unavailable.

An SME and evaluator would agree examples of meets, partly meets and does not yet meet before reviewing pilot responses. A new role-play would test application beyond this script. A comprehension and accessibility walkthrough would identify confusing language or interaction barriers. Any later workplace observation would report its sample, conditions and limitations.

[Evidence boundary](#)

This is a fictional portfolio concept. No client needs assessment, human SME approval, representative-learner pilot, measured transfer or business impact is claimed. Published review is quality assurance, not evidence of learning effectiveness.