

Case Study: Enhancing Call Recording Disclosure Compliance

Role: Lead Instructional Designer

Duration: 6-Month Phased Rollout

Format: Blended Learning (Instructor-Led Training & Interactive Video)

The Challenge

In the highly regulated financial sector, failing to properly disclose call recordings poses a significant legal and audit risk. Quality assurance metrics indicated that call center associates were inconsistently delivering the required disclosures, resulting in unacceptable non-compliance rates. The goal was to rapidly correct this behavior and achieve strict internal audit standards without disrupting daily call volume.

The Audience

Front-line call center representatives and their direct managers—a high-turnover audience that requires clear, actionable, and standardized instruction to minimize time off the phones.

The Solution

I designed and executed a six-month blended learning strategy. Recognizing that a single deployment would not create lasting behavioral change, I structured a multi-faceted curriculum to introduce, reinforce, and standardize the correct protocols over time.

- **Phase 1: Instructor-Led Training (ILT) Series:** I authored three comprehensive ILT modules designed as interactive facilitator guides. To ground the training in reality, these sessions utilized real-world call examples, specifically deconstructing instances where the disclosure was missed to analyze the root cause. The modules culminated in structured roleplaying segments, allowing associates to practice the correct verbiage and navigate customer objections in a safe, peer-supported environment.
- **Phase 2: Interactive Video-Based Learning:** Proving to be the most effective component of the curriculum, I developed a highly interactive, long-form instructional video. Leveraging my video production background, I directed and edited live-action re-enactments of common client calls. The video was designed to be active rather than passive; it featured strategic pauses for built-in knowledge checks, allowing associates to watch a scenario unfold, respond to questions about the interaction, and learn the correct protocol all within a single, cohesive training experience.

The Impact

The phased approach successfully shifted the culture around compliance. The interactive video resonated deeply with the audience by bridging the gap between theory and actual floor experience. By combining the interpersonal practice of the ILTs with the consistent, high-fidelity delivery of the video module, we achieved a **38% overall reduction in non-compliance**, successfully bringing the department into alignment with strict audit standards.

Due to the overwhelming success and high engagement of the interactive video, leadership selected it to be integrated into the enterprise-wide new hire onboarding curriculum, ensuring every new associate at the bank receives this critical baseline training from day one.

Key Takeaways

This project demonstrated the power of a blended learning campaign over a one-off training event. While the interactive video provided an excellent, highly engaging baseline that was scalable enough for enterprise adoption, empowering managers with well-designed ILT materials ensured those concepts were continuously practiced and retained on the floor.