Design Document - Alyssa Aiello

Business Purpose	To train new Venmo customers to perform basic tasks in the app and decrease customer inquiries by 15% next quarter.
Target Audience	Consumers who are new to Venmo.
Training Time	15 mins
Training Recommendation	A microlearning is the ideal modality for this training because the customers are spread across the country in various locations and need readily available, just-in-time training. I recommend Articulate Rise microlearning and a short assessment.
Deliverables	● 1 microlearning course, developed in Articulate Rise
Learning Objectives	By the end of this course, you will be able to: 1. Sign up and connect your bank account. 2. Send and request money. 3. Transfer money to your bank account.

Training Outline	● Introduction
	  ○ Learning Objectives
	  ○ Why Venmo?
	  ○ Meet the Learner Persona
	    ■ Amber- a frequent user of Venmo
	● Sign Up
	  ○ Requirements
	  ○ Download app
	  ○ Sign up for a personal account
	  ○ Add and verify bank account
	  ○ Sync your contacts
	  ○ You Can Do It (YCDI): You've successfully created your Venmo account! The hardest part is over.
	● Send or Request Money
	  ○ Scenario: I recently had a delicious brunch outing with the girls. Let's go through paying back my friend who picked up the tab.
	  ○ Send
	    ■ Start from Home Screen (to avoid reteaching)
	    ■ Search for your contact
	      ● Tip: Before you send a payment to someone, ask them to confirm their Venmo username.
	    ■ Enter transaction details
	    ■ Set visibility and payment method
	    ■ Select Pay

- ○ Recall and relate: Now that you can send money through Venmo, remember that requesting money is a similar process.
- Transfer Money
  - ○ Scenario: Recently, I paid for drinks for a group of friends and they all paid me back through Venmo. Now, I need to transfer that money back to my bank account.
  - ○ Pitfall: To avoid transaction failure, make sure you've verified your bank account before starting a transfer.
  - ○ Select Me > Transfer
  - ○ Edit transfer amount and choose a standard transfer.
  - ○ Confirmation message - Transfer Initiated
  - ○ What's next?
    - ■ Check the status of your transfer in the Venmo app.
      - ● Instant transfers may show as pending - It can take around 30 minutes for the transfer to complete.
      - ● Standard transfers can take up to three business days to arrive in your bank.
    - ■ If your transfer shows as completed on Venmo, check your bank statement or contact your bank.
      - ● Instant transfers will appear as an original credit transaction (OCT) or a real-time payment, not an ACH/ direct deposit
      - ● Standard transfers are sent as ACH deposits with the note "VENMO-0 CASHOUT" and may be back-dated up to two days earlier on your statement
- Quiz
  - ○ MC: What should you do before you transfer money for the first time to avoid transaction failure?
  - ○ MC: What should you do before you send money to a friend for the first time to make sure the money goes to the right person?
  - ○ MC: You just initiated an instant transfer, but it hasn't come through yet. Why might that be?
  - ○ MR: Which requirements must you meet to sign up for Venmo?
- Resources
  - ○ YCDI: Now that you've completed the course, performing basic transactions on Venmo is within your reach.
  - ○ Help Center
  - ○ Venmo Education
    - ■ Money Talks
    - ■ Dear Venmo

Assessment Plan	A four-question assessment focusing on the key takeaways, including common pitfalls and FAQs. A 75% score is required to pass.
Branding	