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# EXCEL IN ENTREPRENEUR'S FINANCIAL MODEL

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### Part 1: Topic

#### Part 1a. Learning Goal

Within 3 hours, entrepreneurs will create their financial model using Microsoft Excel.

#### Part 1b. Audience Description

The learners benefiting from this lesson are entrepreneurs from the Middle East, mainly from Jordan and other neighboring Arabic countries. Arabic is their first language and English is their second. They are all incubated in one of the best incubators in Jordan. The learners are working adults. They have different backgrounds and working fields, but the common factor that they all share the same duties in running their own startups by wearing multiple hats to run their businesses with very limited budget till they find an investor.

### Part 2: Analysis

#### Part 2a. Needs Assessment Survey

A survey was created with the help of Google form and Nasser who will conduct the instruction. Nasser has graduated from the same incubator of our targeted learner in this project, so he has a good sense of the atmosphere in that incubator. Nasser is Microsoft Excel expert and have a good relationship with almost all of the entrepreneurs in that incubator, that's why he have all their emails and knows general information about each entrepreneur project. The survey was created using Google forms and sent via email to 90 entrepreneurs. Nasser and I completely understand the busy life of entrepreneurs that's why the questions were short to the point. After a couple of days we only received 15 responses out of 90. The survey was designed to better determine the level of the entrepreneurs' current technological skills, background, need to learn Microsoft Excel, their preferred learning context as a busy entrepreneurs and Microsoft Excel place in their current and future professional life. A copy of the survey can be found [at the following link](#) or in [Appendix A](#).

#### Part 2b. Needs Assessment Data

A summary of the responses can be found in [Appendix B](#) or at the following [link](#) , the detailed responses can be found in this [link](#). The aim of the survey is to validate this project claim that there is really a need for Microsoft Excel training. When entrepreneurs received the question about their skill in mastering Excel (Figure 1); 40% showed that they have high proficiency in using excel and this is the result of their educational background or work or incubator motivational atmosphere where all entrepreneurs work to improve their personal skills at all level. 47% of the respondents said that they have proficiency in using excel to some extent. To some extent could vary from one learner to the other, it means for some that they can do the very basic things in Excel and for others it means that they can do more with the work sheet , but

not mastering Excel. This implies that this training could be more advanced and not basic, but 13% of the respondent showed that they know nothing about using excel which will put them behind the whole group. So the best solution in my point view was to include a prerequisite material that will enhance individuals who knows nothing about Excel, but Nasser's point of view was that we should consider the whole group as one and start from scratch. Nasser will be the SME for this project and since he knows Excel I will take his advice.

The other interesting question that showed that most entrepreneurs in that incubator value Microsoft Excel; came when they were asked whether if they think that Excel will help them in their entrepreneurial life to execute their financials (Figure 2), 60% respondents said that it will do, 33% Said it will do to some extent and 7% said it won't.

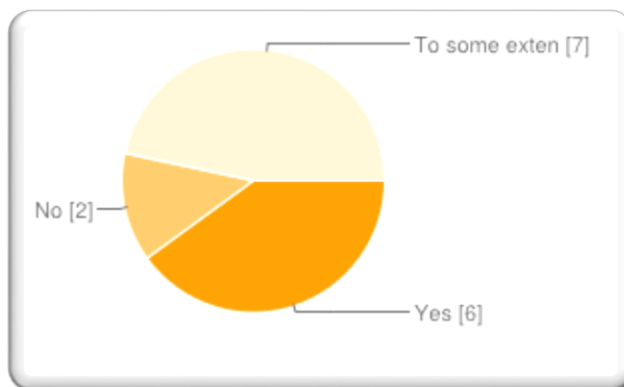


Figure 1: Mastering Excel Skills

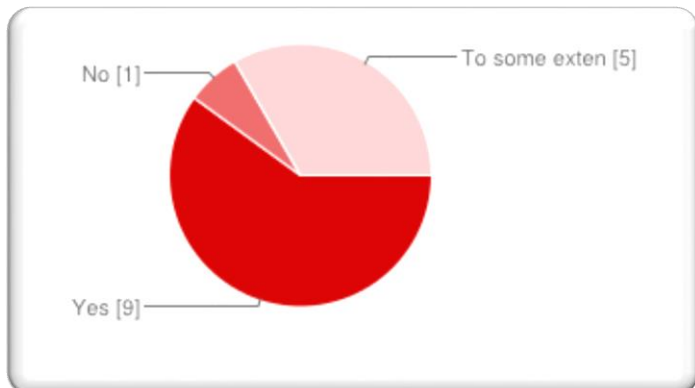


Figure 2: Is Excel Helpful for Entrepreneurs

My partner Nasser who is working with me in this project is an Excel expert, running his own startup since 2011 said that the respondents who underestimated or didn't knew how Excel could help them might be junior entrepreneurs in the incubator who are in the process of creating their business plan, with no cash in and out or relying on others to execute their financials.

Part 2c. Analysis of Learners

The learners in this project are well educated adult Entrepreneurs (Figure 3), 53 % of them are above 35 years, which means that they are married with at least 2 children, because it's very rare that you might find an individual in the Middle East who might cross 30 years without being married and have at least 2 children.

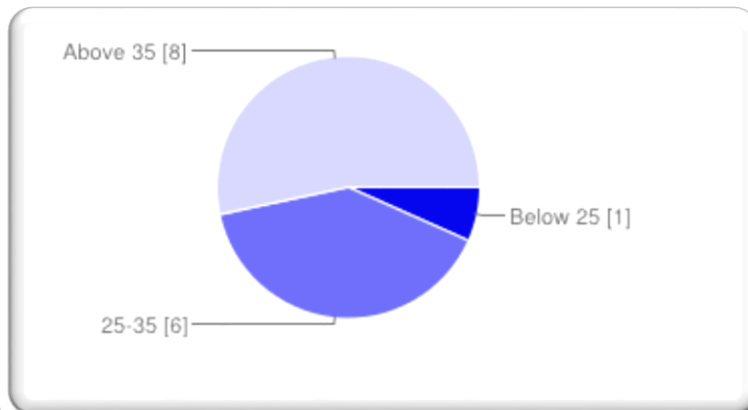


Figure 3: Entrepreneurs' Ages

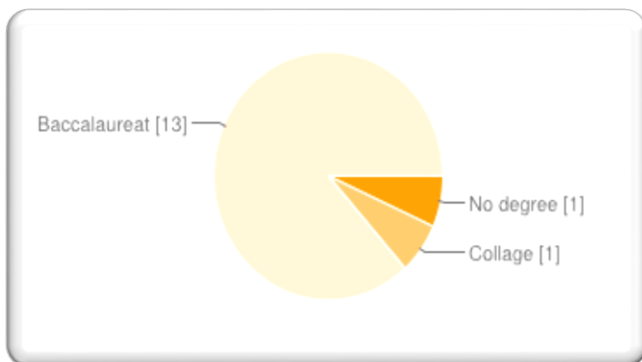


Figure 4 Entrepreneurs Background

The survey showed that 87% of the respondents have completed their Baccalaureate degree or higher (Figure 4). This would be the reason of their proficiency in using computer in general, because 80% of the respondents said that they are very comfortable working on computer (Figure 5).

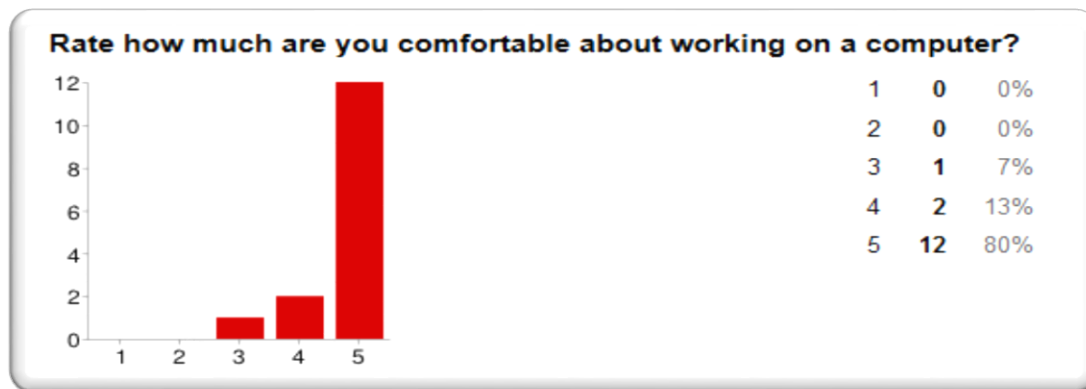


Figure 5: Entrepreneurs Computer Skills

The respondents are also concerned about being connected to knowledge and information through their mobile connectivity all the time (Figure 6); 93% of the respondents have access to internet via mobile, which means that they are somehow financially stable, able to pay the bill of the smart device and internet connection. Most importantly it means they are technology savvy with open minds. Motivated enough to create their own start-ups and took the burden of challenging themselves to learn new skills in running their start-ups. This also implies that this group of learners can easily adopt learning new skills they might find useful to their professional life and Microsoft Excel will be one them.

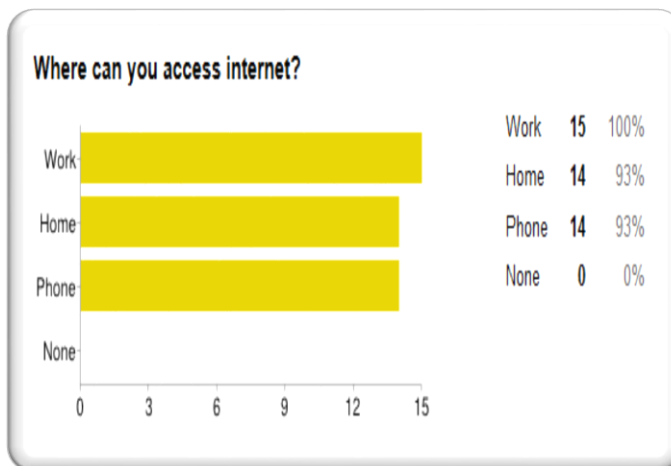


Figure 4: Internet Access Channels

Finally, 99% of the entrepreneurs in that incubator are from the Middle East, so they all share the same language, traditions and cultural background, their first language is Arabic and English is their second language that they master to a good extent, because English is the main used language in universities in the Middle East. The above factors will have positive effects on communicating, learning and transferring information among each other.

**Part 2d. Analysis of the Learning Context**

The training described by this project will be 10% web facilitated with well-designed online resources for home review. Face to face facilitation (Figure 7) will be the major strategy in this training to apply exercises and answer questions in the incubator meeting room.

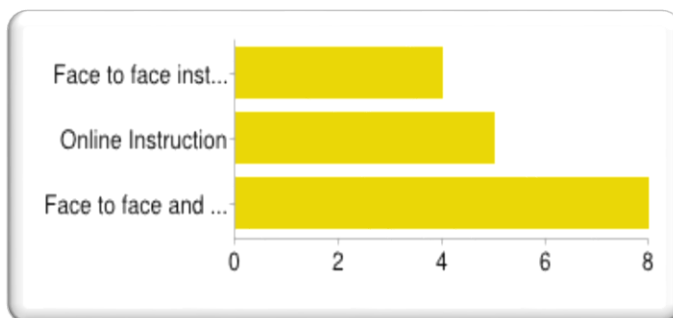


Figure 5: Online Learning Preference

The incubator have internet connection, but the training couldn't be done at any time, because the meeting room is a shared office among all entrepreneurs in that incubator, so the training will be held at the weekend possibly on Friday or Saturday. In addition, it's hard to set a time that will suit all learners 100% since each one of them have his/her own startup to run, this was clear when 27% of the respondents showed concern about the time that could take them in learning and applying new skill. We shouldn't forget that entrepreneurs are self-motivator individuals and finding a time to improve a certain skill that will improve their performance in work is not a challenging task. Two weeks prior the training the SME will send

[poll survey](#) to all potential attendees to identify the best day/time for all of them to conduct the training.

The prepared material will consider different learners need as the survey (Figure 8) showed that this group of learners prefer multimedia format to absorb and apply information. In addition, since learners have internet access almost all the time within their mobiles, home and work. The SME will send the multimedia content to learners before the training for [pre-training orientation](#).

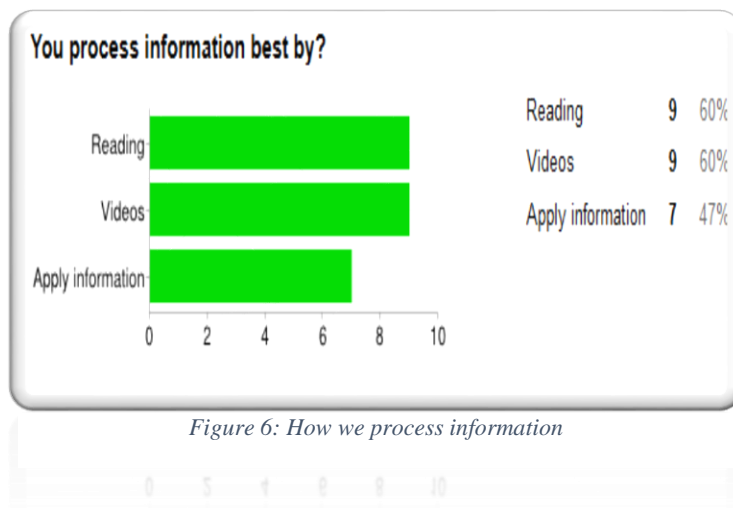


Figure 6: How we process information

During face to face training time, learners with the SME need to secure a laptop with Microsoft Excel. The SME need to secure the [demo Excel sheet](#) and make sure that all learners have it on their laptop during the training time. The meeting room will be equipped with LCD projector for live presentation during the training time. The meeting room should be adjusted to fit the 9 learners (7 respondents who said that they know Microsoft Excel to some extent. In addition; 2 respondents responded that they know nothing about Microsoft Excel). Finally, 40 % of the entrepreneurs in this survey assured that they have proficiency in using Microsoft Excel (Figure 1) and this will create a motive for others to compete and get support from this entrepreneurial atmosphere.

#### Part 2e. Analysis of the Performance Context

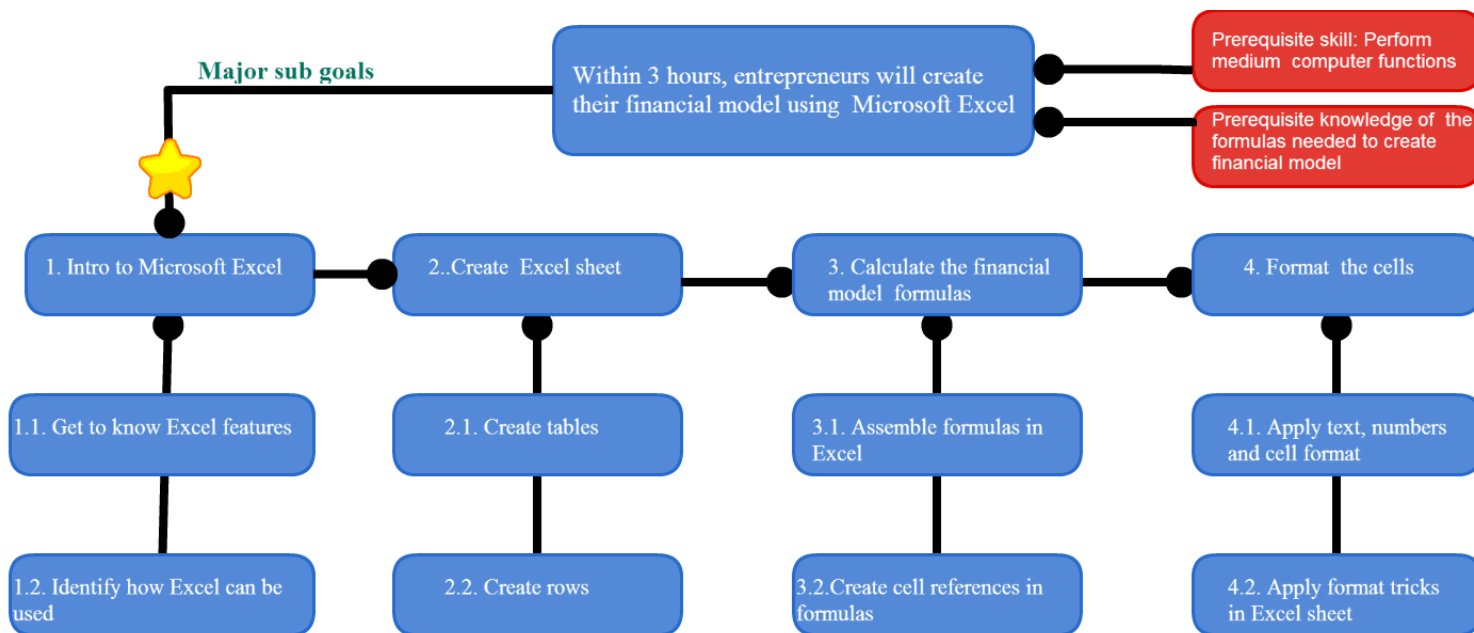
The performance context for this training is the same as the learning context. Entrepreneurs will get knowledge and apply it immediately during the training time to enrich their professional skills for current & future use. The formative assessment during the training will help assess how can learners transfer their skills to new contexts.

Entrepreneurs are junior managers who should manage their daily startup financials. One of the major areas that control entrepreneur's life is the cash flow, it needs to be calculated in advance with well-prepared financial statements sheets in the financial model. This justify why 60% of the respondents in this survey assured that learning Microsoft Excel will help them in executing their financials (Figure 2). When entrepreneur control their financials they will work more intelligently and become the first line of defense for potential future problems in their startup company.

#### Part 2f. Analysis of the Content

The goal of this training boot camp is to enable entrepreneurs to create their basic financial model using Microsoft Excel. Filtering this goal into more sub goals are is in the below flow chart





### Part 3: Planning

#### Part 3a. Rationale

Entrepreneurs are business owners who need to run their financials on a daily basis. Running the expenses, salaries, and updating the financial model in their business plan for investment, the list is just endless. The business plan is the core section in entrepreneurs' investment life, having well thought-out financial model with accurate data in the business plan will support entrepreneurs in generating an evaluation sheet for investment, this sheet should be prepared before meeting or contacting any investor and so no mistakes should be allowed.

Microsoft Excel is generally the main software used to generate the data for the financial model. In the [need assessment](#) section almost all entrepreneurs in the incubator expressed that mastering Excel will help them in running and controlling their financials, but unfortunately not all of them had the chance to master this software, so they rely on other resources to execute the financial model sheets. Entrepreneurs are self-motivated individuals who believe that any skill that should be acquired to support their business must be learned and this will help the claimed training in this project. According to Nasser (SME) there are mentors in that incubator who give free review for the financial model for all entrepreneurs, this will motivate our learners in this project to learn Excel and execute their financial model data before they graduate from the incubator after 3 months.

Generative and instructor modeling scaffolding strategies will be used in this training due to the following reasons:

- Learners in this project are well-educated tech savvy entrepreneurs able to digest new software skills with minimal instruction, it's predicted that they will bring and use their past computer experience in learning Microsoft Excel.
  - Adult learners like to be respected, using Generative and modeling scaffolding strategies will give them a sense of self-responsibility, self-confidence and respect to their learning abilities.
  - Using Generative scaffolding strategy will promote learners active contribution by giving them a chance to try things rather than to be observers. This strategy will also promote using a higher level of critical thinking, because learners are forced to find a solution to solve a certain issue during the training.
  - Using Generative and modeling strategies will encourage learners to express their ideas, reasoning and give feedback at every opportunity, this will increase their self-confidence
- Keller's (1983, 1987) ARCS Motivation Model will be used in this training boot camp as an instructional framework. The motivational ideas will be merged in the instructional tactics (Activities, Self-Checks, Tests).

Constructivist and Connectivist approaches will be the main approaches in this training; the applying approach will be the major approach. Even though that Connectivist approach will need longer times to be assessed, the final project in this training will help learners start connecting what they have learned to enhance their new gained financial skills. The instructors modeling scaffolding strategy will be a combination of Instructivist & Constructivist approaches.

The Constructivist approach will support deep learning, because it requires higher level of thinking in applying what will be learned, this will allow learners to be part of the lesson not observers. Learners will have the chance to apply this approach a lone and in group, group collaboration and communication among each other and with their instructor will improve their performance.

The instruction is designed to foster different interaction to guarantee the achievement of the training ultimate goal; attendees will interact in different approaches:

- Instructor to learners when the SME model or explain certain concept
- Learner to instructor when learner engage with the SME and participate in the training
- Learner to learner when learners split into groups to collaborate
- Learners to content interaction when learners work on their pre-work & final project

### Part 3b. Learning Objectives

Below you can find my list of learning objectives and sub objectives:

1. In 20 minute group discussion, learners will demonstrate their knowledge for Excel by showing at least 5 features of Excel using the demo Excel sheet in front of their classmates
  - 1.1. Using online resources one week before the training, learners will reflect on their understanding of Excel features in one composed paragraph
  - 1.2. Using online resources one week before the training, learners will brain storm ideas on the usages of Excel in their written notes

2. Using Excel, learners will create their Excel sheet that resemble the SME demo sheet
  - 2.1. With the SME live presentation, learners will create 5 tables that resembles the SME demo table
  - 2.2. With the SME live presentation, learners will create rows that resembles the SME demo Rows
3. Learners will calculate/solve the financial model formulas using at least 4 different equations
  - 3.1. Using SME live demonstration, learners will generate at least 3 formulas for their financial model
  - 3.2. Using SME live demonstration, learners will generate cell references in formulas for all their Excel sheet
4. Using the financial model Excel sheet, learners will criticize peer Excel sheet formatting
  - 4.1. With the live SME presentation, learners will examine text, number and cell format for the SME demo sheet
  - 4.2. With a handout worksheet, learners will produce at least five tricks in the SME demo sheet

**Part 3c. Matrix of Objectives, Bloom's Taxonomy, and Assessments**

Below you can find my analysis for the objective & sub objectives. Learners in this project are well-educated tech-savvy adults and can find their way easily in Excel with medium guidance and support from the SME who will be their model

| Objective NO | Bloom's Taxonomy classification | Scaffolding strategy to be employed to teach the objectives | Type of Assessment                           |
|--------------|---------------------------------|---|--|
| 1            | Comprehension                   | Generative  | Formative assessment – Group discussion      |
| 1.1          | Knowledge                       | Generative  | Self-assessment                              |
| 1.2          | Knowledge                       | Generative  | Self-assessment                              |
| 2            | Synthesis                       | Generative  | Formative assessment – performance activity  |
| 2.1          | Application                     | Instructor modeling   | Performance task & SME observation/ feedback |

|     |             |                     |  |
|-----|-------------|---------------------|--|
| 2.2 | Application | Instructor modeling | Performance task & SME observation/ feedback |
| 3   | Evaluation  | Generative          | Formative assessment – performance activity  |
| 3.1 | Evaluation  | Instructor modeling | Performance task, Summary & reflection       |
| 3.2 | Evaluation  | Instructor modeling | Performance task, Summary & reflection       |
| 4   | Evaluation  | Generative          | Formative assessment – performance activity  |
| 4.1 | Analysis    | Instructor modeling | Performance task & peer feedback             |
| 4.2 | Application | Generative          | Performance task & Visual presentation       |

Part 3d. ARCS Table

Below you can find the motivational strategies in ARCS table which will be used in this training

ARCS: Attention

A1: Capture Interest (Perceptual Arousal):

*What can I do to capture their interest?*

- Humorous introduction: The SME will start his presentation with a funny quote from successful entrepreneurs or picture to break the ice
- The SME will remind learners of their daily struggle in assembling their financials in a funny way and how much they pay to get this job done
- The SME could get learners interest by sharing one of his entrepreneurial anecdote
- SME could invite attendees to discuss what they think makes a successful entrepreneur

A2: Stimulate Inquiry (Inquiry Arousal):

*How can I stimulate an attitude of inquiry?*

- With the help of SME learners will list the component of the financial statements & other sheets that learners will be able to produce when mastering Excel in this training

- At the end of the training SME will ask learners on new topics learners would like to master in Excel for the next training boot camp
- SME will inform learners that their final project will be the start point for finishing their financial model sheets

A3: Maintain Attention (Variability):

*How can I use a variety of tactics to maintain their attention?*

- The SME voice tone & body movement will vary during the training time.
- Change in the SME presentation style (humorous, visual, fast – slow, loud – soft.)
- There will be break ups between instruction to prepare learners for new concept
- The instruction interaction will vary from instructor to learner, learner to learner and learner to instructor

### ARCS: Relevance

R1: Relate to Goals (Goal Orientation):

*How can the training best meet my learner's needs?*

- The SME will continuously (each 30-40 minute) remind learners of the training goals that will meet their desire to create financial model
- The SME will remind learners of the importance of mastering Excel to execute their financial statements sheet that will enable them execute their evaluation sheet for their round of investment

R2: Match Interests (Motive Matching):

*How and when can I provide my learners with appropriate choices, responsibilities, and influences?*

- The SME will send the training material two weeks before the training time, it will simulate what will be taught in the training in different format. This will help learners to influence their learning experience, choice of what and when to learn

R3: Tie to Experiences (Familiarity):

*How can I tie the instruction to the learners' experiences?*

- The SME will simplify the process of learning Excel, because it resembles the basics of all Microsoft product learners use in a daily basis. 80% of the learners declare that they are very comfortable working with computers
- All attendees knows how to calculate the financial model formulas manually, SME will inform them that they only need to apply these formulas in new context which is Excel

## ARCS: Confidence

### C1: Success Expectations (Learning Requirements):

*How can I assist in building a positive expectation for success?*

- The SME will state the goals of this training and what's expected from learners
- SME will provide learners with clear rubric that should be met during assessment, so learners know the path that will support their success

### C2: Success Opportunities (Learning Activities):

*How will the learning experience support or enhance the students' beliefs in their competence?*

- The learning material, required tasks and formative assessments will be chunked in to small digestible- amounts to prevent an overload of information to increase learning success opportunities
- SME will use observations and positive feedback to support learners efforts while practicing the activities during the training time
- The difficulty of the formative assessment will be gradual to prevent learner frustration

### C3: Personal Responsibility (Success Attributions):

*How will the learners clearly know their success is based upon their efforts and abilities?*

- Learners will have the chance to reflect on their learning experience in front of their colleagues and get feedback
- Learners will be asked to criticize their Excel sheet and this can be achieved when learners work on their skills before & during the training to reach a level that permit them to do so

## ARCS: Satisfaction

### S1: Natural consequences (Self-Reinforcement):

*How can I provide meaningful opportunities for learners to use their newly acquired knowledge/skill?*

- Learners will have the chance to apply what they learn immediately during the training and save it as well for future use
- The SME will reinforce learner's with an appropriate feedback along the training time and especially after completing each activity
- Learners will have the chance to brain storm ideas on how he/she can use the new Excel skills in written notes for different purposes and discuss it in group
- Learners will have the chance to give peer review for their Excel sheet and this will allow learners who mastered certain task to help others who haven't yet achieved this level of improvement

**S2: Rewarding Outcomes (Extrinsic Rewards):**

*What will provide reinforcement to the learners' successes?*

- SME should provide constructive feedback, suggest places for improvements and how learners can reach out him through email or phone or any for any further questions
- Learner will have his/her activity graded using clear rubric
- Learners will have the chance to present their final Excel sheet visually in front of other learners

**S3: Fair Treatment (Equity):**

*How can I assist the students in anchoring a positive feeling about their accomplishments?*

- Learners will have the chance to observe their success in gaining new skills gradually after the completion of each formative assessment, and with the appropriate feedback they can move forward till they achieve the training ultimate goal
- The SME will provide immediate verbal praise for learners successful progress or accomplishments

Keller, J. M. (2010). *Motivational design for learning and performance: The ARCS model approach*. New York: Springer.

### Part 3e. Instructor Guide

#### Background Preparation/Set-Up

The SME needs to prepare learners a few days before the training starts. Please review [SME timing checklist](#):

1. In a welcoming email the SME should send the [poll survey](#) via invitation or email and collect feedback to inform learner of the best day/time that will suit almost all learners , so they can prepare themselves ahead , the email will also contain another link for the [Self-evaluation](#) application for learners before sending any learning material to diagnose learners situation (pre-test)
2. Second welcoming email from the SME after he collect the results of # 2 with the following:
  - 2.1. The day/time they need to attend the training accompanied with [learner guide](#), so that learner familiarizes themselves on what will be learned. The SME needs to focus on what will be learned using this guide.
  - 2.2. The SME will need to remind learners in his email that bringing their laptop is a must for the success of this training
  - 2.3. The SME should remind learners that they should make sure that they have Microsoft Excel in their laptop and 2013 version is preferable
  - 2.4. The SME must send the [Excel demo sheet](#) and remind learners of the importance of having it during the training time
3. The SME needs to provide learners on how they can approach him via phone, twitter.....etc., learners should be connected to the SME before, during and after the training

4. When knowing the day/time the training will be held, the SME should notify incubator administrators that he will be using the meeting room with the available projector on that day/time. According to Nasser (SME) the incubator is usually open 24/7 for all entrepreneurs, but the SME should double check. When getting the approval the SME need to make sure that he can successfully plugin the projector to his laptop that will be used in the training. Knowing how to use this part of technology is essential for the success of the training. The SME should seek support from the appropriate administrator in the incubator if he failed to get to know how the available projector is used



Part 1: Pre-Training orientation – Home

| Sequenced Intermediate Learning Objectives  | Content Outline   | Instructional Tactics (Activities, Self-Checks, Tests)   | Motivational Tactics (Activities) Classify as A, R, C, S or Combo  | The simulated online material   | Time required                                    |
|---|---|--|--|---|--|
| <p><b>Home self-assessment:</b><br/>                     1.1. Using online resources one week before the training, learners will reflect on their understanding of Excel features in one composed paragraph<br/>                     1.2. Using online resources one week before the training, learners will brainstorm ideas on the usages of Excel in their written notes</p> | <ul style="list-style-type: none"> <li>*Viewing Excel sheet features</li> <li>*What is Excel?</li> <li>*Introduction to Excel interface</li> <li>*How to create new blank workbook?</li> <li>*Understand Excel cells</li> <li>*Excel page layout</li> </ul> | <p>Learners should receive an email from the SME to prepare them for self-assessment stage:</p> <ul style="list-style-type: none"> <li>*The SME will recall learners prior knowledge by reminding them that they need to revise financial model formulas prior attending the training</li> <li>*The SME will ask learners to scan their <a href="#">Excel demo sheet</a></li> <li>* The SME will ask learners to review the resources in <a href="#">slide 2</a>, <a href="#">slide 3</a> &amp; <a href="#">slide 4</a> to self-assess their understanding for Excel prior attending the training</li> <li>*The SME will inform learners that after reviewing the online resources and scan the demo sheet they need to send him a document where they will compose a paragraph about Excel features and brainstorm ideas on how can they use Excel in work &amp; life</li> <li>*When the SME receive learners document he should send immediate encouraging feedback</li> </ul> | <ul style="list-style-type: none"> <li>*In the sent email- The SME will grab learners attention by listing the financial statements sheets learners will be able to produce by the end of the training (AR)</li> </ul> | <p><a href="#">Excel demo sheet</a><br/><br/><a href="#">slide 2</a>, <a href="#">slide 3</a> &amp; <a href="#">slide 4</a></p> | <p>Any time/day prior attending the training</p> |

Part 2: Live Training Introduction Section

| Sequenced actions    | Content Outline   | Instructional Tactics (Activities, Self-Checks, Tests)   | Motivational Tactics (Activities) Classify as A, R, C, S or Combo   | The simulated online material  | Time required |
|----------------------|---|--|---|--|---------------|
| Training orientation | <ul style="list-style-type: none"> <li>*Brief bio summary about the SME</li> <li>*Funny humorous picture and/or quote &amp; prepared questions in advance by the SME</li> </ul> | <ul style="list-style-type: none"> <li>* SME will announce that the training will begin in 5 minute &amp; learners need to take a seat &amp; open their laptop. In the meanwhile the SME is connecting his laptop to the projector</li> <li>*The SME will introduce himself to learners and let each learner introduce him/herself and give one reason of why Excel should be learned. SME should show interest in the student's thoughts and opinions. Adult learner like to be respected and this should be kept in mind all the training time</li> <li>*The SME will break the ice among attendee in the room by displaying a funny image on the projector that resemble learner's situation or use a quot. Then start asking different questions about learners' daily struggle in creating the financial</li> </ul> | <p><b>Replicate those strategies during the lesson as needed:</b></p> <p><b>Gain learner attention:</b></p> <ul style="list-style-type: none"> <li>*Use relatively loud voice to grab learner's attention with a smile &amp; a welcoming massage (A).</li> </ul> <p><b>Establish purpose:</b></p> <ul style="list-style-type: none"> <li>*The SME will express his happiness that learners have attended the training &amp; that reflects how much they are dedicated to improving their skills &amp; business (C)</li> </ul> <p><b>Bond learners</b></p> <ul style="list-style-type: none"> <li>*Humorous introduction that reflect learners daily struggle with financials using pictures, quotes or questions (AR)</li> </ul> <p><b>Stimulate interest and motivation:</b></p> | <p><a href="http://read.bi/1E34dnE">http://read.bi/1E34dnE</a><br/> <a href="http://bit.ly/1x0SOWK">http://bit.ly/1x0SOWK</a><br/> <a href="http://bit.ly/1ur03H4">http://bit.ly/1ur03H4</a></p> | 15 m          |

|  |                                |   |  |   |     |
|--|--------------------------------|---|--|---|-----|
|  |                                | <p>section in their business plan or how much they pay</p> <p>*The SME should focus on giving learners equal opportunities to express themselves in 30 s</p> <p>*Now remind the learners that they are here to end their struggle with their financials &amp; by the end of this training they will be Excel Ninjas</p> | <p>*The SME voice will become more serious, clear and motivating for the training next level, he will remind learners that this training will help them to execute their financial model sheets (AC)</p>   |   |     |
| Introduce learners to training goal                        | *Training description material | *The SME will move to the next slide that describes the training  | *The SME will start his training by describing its goal & what's learners can achieve by completing this training with its activities (C)  | <a href="#">Description of the training purpose</a> | 2 m |
| Motivate learners with the goals to be achieved at the end | *Training goals & sub goals    | <p>*The SME will move to the next slide &amp; start discussing what will be learned to achieve the training goal</p> <p>*The SME will state that it's time to play with Excel</p>   | <p>*Outline training goals to initiate inquiry (A)</p> <p>*The SME will remind learner that they will achieve the goals because they have good computer skills and they are aware of all the formulas needed to execute the financial model, but most importantly they are here, because they decided to (C)</p> <p>*1 minute break up to prepare learners to the new concepts (A)</p> | <a href="#">Outline for the training goals</a>      | 3 m |

Part 3: Live Training Body Section

| Sequenced Intermediate Learning Objectives   | Content Outline   | Instructional Tactics (Activities, Self-Checks, Tests)   | Motivational Tactics (Activities) Classify as A, R, C, S or Combo   | The simulated online material                                | Time required |
|--|---|--|---|--|---------------|
| <p><b>Lesson 1</b></p> <p>1. In 20 minute group discussion, learners will demonstrate their knowledge for Excel by showing at least 5 features of Excel using the demo sheet</p> | <p>*Learners prior knowledge about financial model formulas &amp; the familiarity learners gained from the online resources they have received from the SME</p> | <p>The SME will split learners into two groups</p> <p><b>*Formative assessment<sup>1</sup>:</b> 1. The learners are asked to discuss what they have learned about Excel so far and the SME will walk around between learners to observe and listen to the discussion. 2. Learners are asked to open the demo Excel sheet during the discussion as a reference tool in this activity. 3. Learners are asked to show at least 5 features for Excel sheet using the demo sheet in front of their classmates</p> <p>*The SME will scan learners while walking and give immediate feedback</p> <p>*In 1 minute break up the SME will alarm learners that they will move now to the next lesson which will be a challenging and exciting lesson at the same time</p> | <p><b>Replicate those strategies during the lesson as needed:</b></p> <p>* Learners will have the chance to reflect on their learning experience in front of their colleagues and get feedback (C)</p> <p>* The SME will use observations and positive feedback to support learners effort while practicing the activities during the training time (C)</p> | <p>Lesson 1: <a href="#">Introduction to Excel sheet</a></p> | <p>20 m</p>   |

|   |   |   |   |  |             |
|---|---|---|---|--|-------------|
| <p><b>Lesson 2</b></p> <p>2. Using Excel, learners will create their Excel sheet that resemble the SME demo sheet data</p> <p>2.1. With the SME live presentation, learners will create 5 tables that resembles the SME demo table</p> <p>2.2. With the SME live presentation, learners will create rows that resembles the SME demo Rows</p> | <p>*Building blocks in Excel</p> <p>*Add/delete blank rows</p> <p>*How to navigate cells &amp; rows, move cells a round</p> | <p>*The SME will open his demo sheet on the projector and inform learners that they should use this sheet in all the training activities</p> <p>*The SME will start his training with a basic navigation for Excel and show learners what is the meaning of cell, row, column, workbook and how they can navigate Excel sheets</p> <p>*The SME will present to learners how to add &amp; delete rows and column in detail</p> <p>*In 10 minute practice the SME will ask learners to add rows &amp; column to the demo sheet</p> <p><b>*Formative assessment<sup>2</sup>:</b></p> <p>*The SME will ask learners to create their first Excel sheet that resemble the demo sheet income statement (sheet 13), name it financial model and save it</p> | <p><b>Replicate those strategies during the lesson as needed:</b></p> <p>*With the help of SME learners will list the component of the financial statements &amp; other sheets that learners will be able to produce when mastering Excel by the end of the training (AR)</p> <p>The SME will reinforce learners during the training by discussing how learning Excel will be very easy, because learners have excellent computer skills (RC)</p> | <p>Lesson 2:<br/><a href="#">Cells &amp; columns</a></p> | <p>30 m</p> |
|---|---|---|---|--|-------------|

|  |  |   |   |   |             |
|--|--|---|---|---|-------------|
| <p><b>Lesson 3</b></p> <p>3. Learners will calculate/solve the financial model formulas using at least 4 different equations</p> <p>3.1. Using SME live demonstration, learners will generate at least 3 formulas for their financial model</p> <p>3.2. Using SME live demonstration, learners will generate cell references in formulas for</p> | <ul style="list-style-type: none"> <li>*Understand what is cell references</li> <li>*Understand formulas &amp; functions</li> <li>*Functions of average, max &amp; min</li> <li>*What is Array formulas?</li> <li>*Introduction to absolute, relative formulas &amp; mixed formulas</li> </ul> | <ul style="list-style-type: none"> <li>*The SME will demonstrate on the projector what is the meaning of cell reference &amp; how learners can create cell reference</li> <li>*On the demo sheet SME will demonstrate how successful basic formulas can be achieved and apply 4 basic formulas (+ - * /), after creating and applying each formula SME will alarm learners to observe how all data in the sheet changed immediately</li> <li>*Learners are asked to create 4 formulas on the demo sheet immediately in group work, meanwhile the SME is walking around to observe and give assistance when needed</li> <li>*In 5 minutes SME will allow learners to express how hard or easy was this activity before he proceed to the more advanced formulas, SME should actively and carefully listen to any questions or inquiry asked</li> <li>*The SME will show how can learners create more advanced formulas (max, min, array &amp; average) and when they need to use such formulas in their work and why</li> <li>*Learners should apply what they have learned in group and create at least 3 formulas in the demo sheet, meanwhile the SME is walking around to give feedback and encouragement</li> <li>*The SME will demonstrate to learners the difference between the absolute, relative and mixed formulas and model one example on each</li> </ul> | <p><b>Replicate these strategies during the lesson as needed:</b></p> <ul style="list-style-type: none"> <li>*The SME will remind learners of the importance of mastering this lesson, because it will help them to execute their financial statements that will enable them to get an accurate company evaluation during their investments round (AR)</li> <li>*The SME will remind learner during this lesson that it will be fun and easy because they have good computer background and prerequisite knowledge of what should be done (R,C)</li> <li>*The SME will provide immediate verbal praise for each learner after his/her successful accomplishments</li> </ul> | <p>Lesson 3:<br/><a href="#">Formulas</a></p> | <p>40 m</p> |
|--|--|---|---|---|-------------|

|   |   |  |   |  |             |
|---|---|--|---|--|-------------|
| <p>all their Excel sheet</p>  |   | <p>one of them on the demo sheet and when they should use such formulas</p> <ul style="list-style-type: none"> <li>*Learners are asked to apply these formulas with their group</li> <li><b>*Formative assessment<sup>3</sup>:</b></li> </ul> <p>The SME will ask each learner alone to create 4 new formulas for their personal new financial model sheet</p> <ul style="list-style-type: none"> <li>*SME will give immediate feedback and praise any learner who create more than 4 formulas</li> <li>*The SME will alarm learner that they have passed the hardest part in learning Excel and the only thing will enable them to be Ninjas Excel will be when they practice everything they have learned in their final project at home</li> <li>*The SME will notify learner that they will move to the fun part in Excel</li> </ul> |   |  |             |
| <p><b>Lesson 4</b></p> <p>4. Using the financial model Excel sheet, learners will criticize peer Excel sheet formatting</p> <p>4.1. With the live SME</p> | <ul style="list-style-type: none"> <li>*Understanding text &amp; numeric format</li> <li>*Cell formatting</li> <li>*Custom number formatting &amp;</li> </ul> | <ul style="list-style-type: none"> <li>*The SME will ask learners how they apply formatting in any other software.</li> <li>*Tell learners that they will do formatting to their sheets and why they should do formatting and when</li> <li>*The SME will demo on the projector how can learner apply number, text, cell and other formatting tricks</li> <li>*Learners are asked to apply at last 7 formatting on the demo sheet</li> <li>*The SME will ask learners if they noticed if they have any cell with error message</li> </ul>  | <p><b>Replicate these strategies during the lesson as needed:</b></p> <ul style="list-style-type: none"> <li>* The SME will reinforce learner's with an appropriate feedback along the training time and especially after completing each activity (S)</li> <li>* Learners will be asked to criticize peer Excel sheet and this can be achieved when learners skills reach a limit that permit them to do so (C)</li> </ul> | <p>Lesson 4:<br/><a href="#">Cells format</a><br/><a href="#">Excel tricks</a></p> | <p>60 m</p> |

|  |   |  |   |  |  |
|--|---|--|---|--|--|
| <p>presentation, learners will examine text, number and cell format for the SME demo sheet</p> <p>4.2. With a handout worksheets, learners will produce at least five tricks in the SME demo sheet</p> | <p>text functioning</p> <ul style="list-style-type: none"> <li>*Understand error message</li> <li>*Essential formatting tricks</li> <li>*Advanced formatting tricks</li> <li>*Goal seek</li> <li>*Excel fun tips</li> <li>*How to protect data</li> </ul> | <ul style="list-style-type: none"> <li>*The SME will discuss why error message could appear and how to solve the issue</li> <li>*In group, learners are asked to investigate each other error message and guess the reason for this message in order to modify it</li> <li>*The SME will challenge learners to apply as much tricks as they can on the demo sheet excel sheet alone in 10 minutes</li> <li>*Learners will be invited if they wish to demonstrate their sheets on the projector and discuss what they have done so far</li> <li><b>*Formative Assessment<sup>4</sup>:</b></li> <li>*The SME will choose randomly any Excel sheet and invite learners to criticize it</li> <li>*SME will alarm learners that the training is about to finish and he would like to hear how they might apply what they learnt in the future, or how it will help them to meet their learning goals</li> </ul> | <ul style="list-style-type: none"> <li>*Learners will have the chance to present his final Excel sheet visually in front of other learners (S) *</li> <li>* SME should provide constructive feedback, suggest places for improvements and how learners can reach out him through email or phone or any for any further questions (S)</li> </ul> |  |  |
|--|---|--|---|--|--|



Part 4: Live Training Conclusion Section

| Action               | Content Outline   | Instructional Tactics (Activities, Self-Checks, Tests)  | Motivational Tactics (Activities) Classify as A, R, C, S or Combo   | The simulated online material                                      | Time |
|----------------------|---|---|---|--|------|
| Closing the training | <ul style="list-style-type: none"> <li>*SME contact information</li> <li>*Self – evaluation checking</li> </ul> | <p><b>Inform learners about the</b><br/> <b>*Summative Assessment: Final project</b></p> <ul style="list-style-type: none"> <li>*Learners will be asked to create their own financial model with at least 4 sheets at home within 3 days and send it to their assigned peer for review</li> <li>*Each learners in the training will receive an Excel sheet to review it and give feedback using the <a href="#">rubric</a></li> <li>*Learners will need to update their sheets by reviewing the feedback delivered from the peers and may send an email for the SME to refuse any suggestion, but with clear justification in the comment section of the rubric explaining why they think that their peer review failed to meet the rubric</li> <li>*The final copy of the financial model will be sent to the SME for final grading</li> </ul> | <p><b>Replicate those strategies during the lesson as needed:</b></p> <ul style="list-style-type: none"> <li>*SME will remind learners that they will have his/her final project graded with clear rubric (S)</li> <li>*Learners will have the chance to give peer review for their Excel sheet and this will allow learners who mastered certain task to help others who haven't yet achieved this level of improvement (S)</li> <li>*At the end of the training SME will ask learners on new topics learners would like to master in Excel for the next training boot camp (A)</li> </ul> | <p><a href="#">Conclusion Excel demo sheet Self-evaluation</a></p> | 10 m |

### Part 3f. Learning Content

#### 3f.1. Learning Materials

The following instructional resources will be used to support Microsoft Excel training boot camp

| <b>Learning material</b>                                     | <b>purpose</b>  |
|--|---|
| <a href="#"><u>Instructor guide</u></a>                      | The SME will receive a copy of this guide before the training starts, it will enable him to get to know the sequence he needs to follow in this training  |
| <a href="#"><u>Instructors &amp; learner &amp; guide</u></a> | The SME & learners will receive a copy of these online learning resources before the training, these resources stimulates what will be learned in the training. The resources will be learners' reference point in completing their assignments and will help the SME to control the scope of the material that will should be covered in 3 hours |
| <a href="#"><u>Excel demo sheet</u></a>                      | The SME should make sure that this financial model sheet is available to all learners prior the training, it will be learners demo lap were they will apply what they learn using it  |

#### 3f.2. Assessment Materials

Active assessment will be the major motivating approach that will be used to assess learners' during the training and check whether the learning outcomes were achieved or not. Learners will have the chance to reflect on their understanding orally in front of other classmates by giving feedback or criticize certain assignments; learners will have the chance to present their achieved activities to get SME and other classmates feedback. Diagnosed self-assessment survey before and after the training will help learners and the SME to assess learners' strengths and weaknesses and what areas they should work on. The final project is designed to foster the Connectivist approach, the assessment is using a real life scenario were learners are asked to create 4 financial model sheets out of 19, the rest of the sheets are left for learners to assess the transfer of skills.

| Assessment tool   | Type                  | Purpose   |
|---|-----------------------|---|
| <a href="#">Self-evaluation</a>                         | Formative             | Learners will receive this online survey before and after the training, this survey is a formative assessment for learner's knowledge and skills he/she will gain in this training  |
| <a href="#">Practice exercises</a>                      | Formative             | Learners will be able to test the knowledge gained after each lesson through applying. It will enable learners to get immediate feedback on their work from the SME   |
| <a href="#">Final project</a>                           | Summative             | The final project aims to assess learners gained skills after completion the training at home, learners need to create and complete at least 4 sheets for their financial model using their own data. They will send the sheets for peer review, modify the bugs if needed, then send the sheets once again to the SME for final assessment |
| <a href="#">Instructor &amp; Peer assessment rubric</a> | Summative & formative | Peers will assess each other sheets (formative) using the same rubric SME will use in his summative assessment. Peers will have the chance to assess their competency in mastering Excel. This rubric will show learners what is the expected outcome, so they understand what they should achieve to success in this training.             |

Part 3g. Technology Tools

The following technology tools will be used throughout the instruction

| Technology tools  | Rationale   |
|-------------------|---|
| Laptop & internet | The SME & learners will use their own laptop connected to the incubator wireless internet network, their laptop are the main tools to |

|                  |   |
|------------------|---|
|                  | learn Excel during the training time. The internet is necessary during the training for further collaboration among learners in the room  |
| LCD Projector    | The projector will be used by the SME to share his laptop screen and guide learners at each learning activity, learners will use it to display their completed sheets at the end of the training  |
| Microsoft Excel  | Microsoft Excel will be the main software learners will access during the training time to learn & apply activities   |
| Online resources | Learners expressed their interests in reading and viewing online video to understand new concepts. These online resources contain various videos and articles, which will be learner’s reference library that will support the Face to face instruction and required assignments. These resources will simulate what will be learned during the training time |

## Part 4: Evaluation

### Part 4a. Evaluation Plan

Kirkpatrick's Four-Level Evaluation Model is used in this project to evaluate the instruction of this training. The results, feedback and comments gained from the assessments, will reflect the success of the training instruction and will enable re-evaluation of the training boot camp for further improvement if needed.

Please review [SME Checklist](#) to check the sending time of any application in the Evaluation plan.

#### Level 1: Reaction

In order to evaluate entrepreneur’s satisfaction upon completion of this learning experience & how much it met their need, they will receive electronic smiley summative



assessments survey one day after completion of the training from the SME. The answers of this survey will be collected after 2 days, the SME will provide appropriate assessment feedback to each participant.

| Evaluation Category  | Learner – Centered Survey  |
|--|--|
| Program objective  | <input type="checkbox"/> I was able to understand the learning objectives & connect it to what I have learned during the training  |
| Course material  | <input type="checkbox"/> I found that the course material covered all what I dreamed to learn about Excel in this short time   |
| Course relevance   | <input type="checkbox"/> I intend to apply what I have learned about that Excel in my entrepreneurial financial issues   |
| Facilitator  | <input type="checkbox"/> Nasser was the best experienced Excel trainer, because he enabled me to master Excel<br><input type="checkbox"/> Nasser gave me enough time to apply the new knowledge<br><input type="checkbox"/> I felt comfortable & engaged in the training, because Nasser encouraged open productive communication, feedback & comments |
| Evaluation   | <input type="checkbox"/> The time was enough to demonstrate my mastery of what I have learned about Excel  |
| Training room  | <input type="checkbox"/> The training room set-up was comfortable & enabled me to concentrate  |
| <p><b>How can we make our training better?</b><br/> <b>Comments*</b></p> |  |

**Level 2: Learning**

In this level we need to examine what degree entrepreneurs have gained the knowledge, skills and attitudes based on their participation in the [learning activities](#) (formative, summative, surveys). These activities starts before, during & after completion of the training, it aims to observe the progress of the learners as they gain new skills & examine learners confidence in applying what they have learned in their start-ups. In addition, Nasser will examine learners' level of confidence through informal open discussion; this discussion could be held individually or in groups during or after the training. This productive open discussion can help learners' reveal the major barriers that forbid learners from completing any requirements in this training, these comments should be considered in re-evaluating the training (assessments, content, instruction, training atmosphere) once again.

In order to examine how much learners are committed to apply what they have learned in their startups, they need to get support from Nasser by any means after completion of the training for at least 2 weeks, this will help learners to bridge what they have learned to new context in confidence, feel supported & encouraged. Nasser will support learners through emails, SMS & direct phone call if needed. From the [need analysis](#) it was clear that learners valued Excel & stated that it will benefit them in executing their financials, but we need to make sure that they are applying what they have learned in confidence and great commitments to professional success & not using their old resources in executing their financials. This will lead us to level 3 of evaluation in Kirkpatrick's model

**Level 3: Behavior**

The purpose of any training event is to impact one behaviors especially in work. Level 3 aims to measure what degree entrepreneurs' behaviors have changed as a result of completion of the training. Applying what have been learned is affected by learners' reaction toward the training (level 1) and how much they were able to master the new skills (level 2). Learners work contexts that require applying these new skills will support transferring the new skills as well. There are two means that will be used to evaluate the transfer of the gained skills to new contexts

1. The SME will send an electronic survey after two weeks of completing the training to examine learners' situation. It was planned that learners complete 4 sheets out of 19 in their summative assessments using the SME [Excel demo sheet](#) , the survey aims to check whether learners is using what they have learned in the training to complete the rest of the financial model sheets

| Learner questions                                   | Answers Options   |
|---|---|
| Have you completed all your financial model sheets? | <input type="checkbox"/> I have completed all my sheet<br><input type="checkbox"/> I'm on my way to complete all the sheet<br><input type="checkbox"/> I plan to, but don't have time |

|  |  |
|--|--|
|  | <input type="checkbox"/> I wish to, but I can't do this alone<br><input type="checkbox"/> I couldn't complete any sheet  |
| Have you used Excel in your work?  | <input type="checkbox"/> Yes, I have<br><input type="checkbox"/> Yes, I have with the help of my expert colleagues in the incubator<br><input type="checkbox"/> Yes, I have & was able to help my colleagues to learn Excel as well<br><input type="checkbox"/> No, I haven't<br><input type="checkbox"/> I found out that I don't need it   |
| If you are not using Excel in your work or in executing your financials, what would it take for you to start using it? | <input type="checkbox"/> More effort from me to practice what I have learned<br><input type="checkbox"/> More live sessions with Nasser<br><input type="checkbox"/> I need more resources to help me figure out things in Excel<br><input type="checkbox"/> I need more assessments to figure out my weakness <ul style="list-style-type: none"> <li>○ Note : it you check No 3 or 4 we would like you to specify the type of content or assessment you wish to have in the comment section</li> </ul> |
| <b>Comments*</b>   |  |

The SME will collect the survey’s results to determine if learners behavior have really changed or not & evaluate areas that need enhancements. As for the ID, the result of this level is crucial in determining the quality of the instruction and parts that need re-evaluation.

**Level 4: Results**

This final level aims to measure learners’ productivity before & after the training instruction. It examines the final impact that training has had on learners & this means achieving the ultimate goal of this training. Below you can find three tools that will enable the ID and the SME to measure learners’ productivity:

1. [Self-evaluation](#) survey will be sent before & after completion of the raining, it will help learners observe their progress and what have they gained after they completed the

training, at the same time it will help SME & ID to track learners’ results to evaluate the required improvements

2. Time frame of two weeks will be given to learners to complete their financial model with the virtual support of the SME, this time will help in showing the effectiveness of the training on learners’ productivity. During this time the SME will continue tracking need assessments for learners to detect any gap
3. After two weeks the SME will send a questionnaires for third party in the incubator to get his/her feedback on learners’ enhanced performance in executing their financial model sheets. According to Nasser, incubator mentors offers free review service for entrepreneurs who finishes their financial models sheets & business plans. An email will be sent to mentors who received a complete financial model from learners who completed Nasser’s training boot camp to check the quality of the delivered financial models

| Mentors questions   | Multiple answers options  |
|---|---|
| I have reviewed new financial model for xyz after he/she finished Nasser training boot camp, and I feel that                                  | <input type="checkbox"/> It was really excellent<br><input type="checkbox"/> It was good<br><input type="checkbox"/> Fair   |
| I believe that xyz need to work more on   | <input type="checkbox"/> Formulas<br><input type="checkbox"/> Advanced formulas<br><input type="checkbox"/> Formatting<br><input type="checkbox"/> Financial model formulas |
| I think that xyz can create his/her financial models if he/she does the following?<br>Please suggestion 3 advices<br><input type="checkbox"/> |   |
| <b>Did the training have any visible impact on xyz start-up? Why?</b><br><b>Comments*</b>   |   |

The results of this questionnaire will help the SME and ID to r-evaluate the training as a whole, because it’s the accumulation of all Kirkpatrick’s evaluation levels



#### Part 4b. Subject Matter Expert Description

The Subject Matter Expert who kindly offered to review this instructional design project in detail was Nasser, the CEO and Founder of an ePayments company. Nasser has a solid background in fin-tech industry (Financial Technology), consultation, technology and banking sectors. He has a strong passion for entrepreneurship and recently his startup became a very successful one in Jordan. Nasser is an Excel expert, he used it heavily in his work; especially in his recent startup to create and maintain his financial model. He taught Microsoft Office (including Excel) during his career with one of the clients in Qatar. In his reply to my request, Nasser said, "The training goals are sufficient for the learner to build his full financial model; as it will enable the learner to deal with the excel sheets, tables, rows, formulas and formats which are the main components to create a financial model". Nasser was given the project materials and evaluation survey on Nov 27th, and his reply along with our email exchange took place on Nov 29th.

#### Part 4c. Evaluation Survey

The SME survey was created using [Google Drive](#). Below you can find the questions that were prepared to gather his feedback and productive criticism. SME answers will help in addressing what was missed in the prepared instruction.

Questions:

1. After you have reviewed the training goals, do you feel that it will help learners to execute full financial model?
2. After you have reviewed the training goals, do you feel that 3 hours can fit these goals?
3. Are you comfortable with the instructor guide structure? Is it easy to track? Are the timing for each lesson suitable?
4. Do you feel that the online resources that will simulate your training adequate to support learners in their assignments?
5. Do you think that using the demo Excel sheet will help you during the training? Why?
6. Are the motivational strategies appropriate for this target audience? Can you add new strategies?
7. Are the assessments activities align with the learning objectives?
8. After your 3 hours training, do you believe that entrepreneurs will be able to complete their final project alone?
9. What other concern do you have about this project in general?
10. How can I enhance this project instruction?

#### Part 4d. Expert Review Results

The SME answers can be found [here](#)

##### **1. After you have reviewed the training goals, do you feel that it will help learners to execute full financial model?**

A 1. The training goals are sufficient for the learner to build his full financial model; as it will enable the learner to deal with the excel sheets, tables, rows, formulas and formats which are the main components to create a financial model; and this is of course assuming that the learner is aware of his financial model content related to his business.

**2. After you have reviewed the training goals, do you feel that 3 hours can fit these goals?**

A 2. I believe the 3 hours are good to achieve the project goals for the following main reasons: the learners are active entrepreneurs with very good computer skills, they will have the training material one day in advance and most of them have previous Excel knowledge.

**3. Are you comfortable with the instructor guide structure? Is it easy to track? Are the timing for each lesson suitable?**

A 3. The instructor guide structure is fair and easy to track with the timing is suitable based on the assumptions that the learners are active entrepreneurs with very good computer skills; they will have the training material one day in advance and most of them have previous Excel knowledge. A risk of extended time to be needed is there if the learners do not read the material one day in advance and if they were not active as expected.

**4. Do you feel that the online resources that will simulate your training adequate to support learners in their assignments?**

A 4. I believe that the online resource is an important tool to support the learners in their assignments and to be used as a quick reference for them.

**5. Do you think that using the demo Excel sheet will help you during the training? Why?**

A 5. Sure, the demo excel sheet will help during the training as it will act as a live example that the learners can use as a template that they can use to do their assignment.

**6. Are the motivational strategies appropriate for this target audience? Can you add new strategies?**

A 6. The motivational strategies used in the project are appropriate and comprehensive and I can add something related to what was listed which is to reward the best financial model (in terms of Excel sheet) with a small gift related to Excel like a book about Excel or a Microsoft Office license.

**7. Are the assessments activities align with the learning objectives?**

A 7. Yes, the assessment activities are aligned with the learning objectives.

**8. After your 3 hours training, do you believe that entrepreneurs will be able to complete their final project alone?**

A 8. I believe so, since they are entrepreneurs and expected that they will need minimum guidance after the training to finalize their project deliverables alone.

**9. What other concern do you have about this project in general?**

A 9. The concerns is mainly an extended time that might be needed if the learners do not read the training material one day in advance and if they were not active and computer skilled as expected.

**10. How can I enhance this project instruction?**

A 10. I believe the project is very well structured and I suggest requesting learners to try to prepare their excel financial plan one day in advance after they read the training material, and

bring their Excel sheet with them to the training; in this way we will have better and effective training course as the learners will be more prepared to the course.

#### Part 4e. Comments on Change

It was very beneficial to get the SME constructive feedback on this project, it was an eye opening for things I assumed it won't happen, but we should always be prepared for the unexpected events. According to the SME answers the major questions I need to think of, because it will affect the training were:

1. What if the attendees weren't prepared enough for this training as I assumed even if we sent them the pre-work assignment? The 3 hours won't be enough!
2. What if the attendees weren't proactive enough during the training? The 3 hours won't be enough!
3. What if the attendees didn't revise or lack the knowledge of the financial model formulas as they claim? Then they won't be able to create the financial model sheets alone

Since the above questions will be risk factors, I need to think of appropriate solutions for my future training and below are my thoughts to prevent the unexpected events:

**Solution** for 1. I believe that if we alarm attendees that an extend time might be needed if they didn't revise the material will be a good option. In addition, we might ask them that if they wish not to do the pre-work then they should notify us to extend the training time.

**Solution** for 2. The SME proactivity might be transferred to learners, I believe that if he sticks with with the motivational strategies mentioned in this project, he could make them very proactive

**Solution** for 3. Sending the prerequisites materials will be a good option

In question 6 the SME suggestion could be achieved, I think it will be great idea to motivate learners with a present. In question 10 the SME suggested that attendees prepare financial model sheet before they attend, I thought that this was an odd suggestion, because it was beyond learners' ability especially for those who knows nothing about Excel and this might cause frustration. So I contacted the SME to clarify about this, he told me that my online material should enable learners to create any Excel sheet with formulas, he said: "let see what we can get from learners and challenge those motivated entrepreneurs". He told me that this homework will enable learners to test their knowledge about the formulas needed for the financial model and refresh their learning abilities alone. The SME expressed his worries about the time and told me that we need to make sure by any means that learners do the pre-work to make this training work effectively in 3 hours. So I will incorporate his suggestion, but with simple exercise. I will ask learners to create one sheet with data and create 1-3 formulas.

In my live interview with the SME I tried to figure out what other concerns does he have about the training material, he gave me a lot of positive feedback on my instruction, but he expressed his personal concern about his attitude during the training and he raised the following questions stressing that it's his own issues that he need to deal with:

1. The SME was not a trainer nor teacher, so what if he wasn't able to help everyone to understand, especially if there was a diversity in the learning curve among learners

2. What if he wasn't able to stick with these detailed instruction, the SME never worked before with detailed instruction and he relied on his expertise to speak what he thinks was suitable
3. The SME expressed his concern about how much he can control the time and scope of this training

I asked the SME how he can solve these issues, he gave me new ideas for his dilemma:

**Solution** for 1. He said that he will be well- prepared before the training, revise the online material and observe learners carefully when they apply the exercises or how they respond to his questions during the training

**Solution** for 2 & 3. He said he needs to rehearse before the training multiple times and focus his thinking

#### Part 4f. Reflective Synthesis Paper

Designing instruction for me was like designing my business plan. I found out that there were many similarities between them. I also found out that a business plan could success or fail due to the same reasons an instructional project had. Both aims to produce an end product for certain customers. Both starts with a need to be met and a continuous evaluation for the process to make improvement for the final product. Both are affected by any change that could occur to any internal element

I wish I had taken EdTech 503 before I create my business plan and update for three times without knowing what was wrong or missing, but now I know quite well. I had an ill structured problems<sup>1</sup> in my first and second business plans. In my first business plan, I failed in creating a smart goal, so I didn't knew which road should I take and this lead me to many stumbles. I was focusing on my project constrains, budget and finding appropriate human resources, but now after EdTech 503, I learned that specifying the goal of a product should be my starting point in any project in my life, not only my business plan. In my second business plan, the problem was identified, but some of its elements were unknown and others weren't analyzed enough the way I learned in Edtech 503 and this lead to incomplete product that didn't met my customer need.

Report # 1 taught me that meeting a learner or customer need does not guarantee the success of your product, it's a whole package you need to think about. At each stage you need to identify and analyze the required elements that will contribute in the success of the final product. Learners or customers need should be analyzed, their characteristics should be identified and the context of your product should be investigated.

Report # 2 helped me to identify all tools that I will need to create and market my final product. I learned how to create and analyze my product components (content, activities), how my product can be used (technology tools), how to create user manual (instructor guide), how to market for my product and encourage my customer to buy in (learning objectives, scaffolding

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<sup>1</sup> Larson, M. B., & Lockee, B.B. (2014). *Streamlined ID: A practical guide to instructional design*. (Chapter 1, p. 6). New York: Routledge. 1 citation

strategies, ARCS model) and I learned how can I approach my customer to sell my product (theories, interaction)

Report # 3 helped me to learn that I need to identify how my product will enhance my customer performance or life quality, it make no sense to claim that I have succeed in solving my customer pain (need), because they are using my product. A clear evidence should be documented to proof this claim, this can be achieved by complete evaluation plan that starts by collecting my customer reaction upon using my products and the context it was used in. The evaluation process never ends with ROI or other, the evaluation of my product competency should never be continuous in all aspects

The process of designing instruction in EdTech 503 taught me to organize my thinking and planning when I want to achieve my ultimate goal in my personal life and work. The knowledge and skills I gained in this course can't be summarized in one page, but I'm quite sure that it will help me in completing my assignments and projects in EdTech program at BSU. In my work I will use what I have learned to re-evaluate my business plan once again to investigate the elements I have missed, because I underestimated their importance and now I knew I was wrong.

## Part 5: Appendix

### Appendix A



## Needs Assessment for Excel in Entrepreneur life

**\* Required**

**Please specify your age in one of the below group \***

- 25-35
- Below 25
- Above 35

**Your region or country \***

**You Educational level? \***

- No degree
- Baccalaureate degree or higher
- Collage

**Rate how much are you comfortable about working on a computer? \***

1   2   3   4   5

**Where can you access internet? \***

- Work
- Home
- Phone
- None

**You process information best by? \***

- Reading
- Videos
- Apply information

**Why would you choose to learn new skills?**

- Work requirement
- Personal reason
- Community
- No reason
- Other

**Did you had a training in Microsoft Excel before?**

- yes
- NO

**Do you have proficiency in using excel? \***

- Yes
- No
- To some extent

**Do you think that learning excel would help you in your entrepreneurial life to execute your financials? \***

- Yes
- No
- To some extent

**The best language I would like to use while learning is?**

**What would be your biggest concern when learning new software? \***

**You learn best by? \***

- Face to face instruction
- Online Instruction
- Face to face and online instruction

**You will learn best because of**

- Your instructor
- Curriculum
- Family
- My inner motive
- Other

**Can you describe your worst training experience you had in the past if any? what happen?**

**Comments**

**Submit**

*Never submit passwords through Google Forms.*



Appendix B



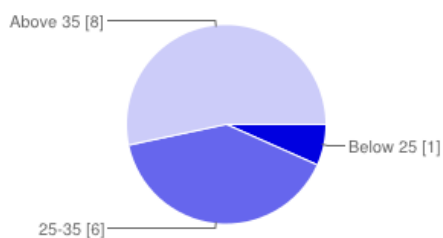
Needs Assessment  
for Excel in Entrepren

# 15 responses

[View all responses](#)

## Summary

Please specify your age in one of the below group

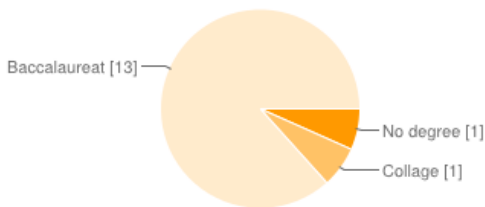


|          |   |     |
|----------|---|-----|
| Below 25 | 1 | 7%  |
| 25-35    | 6 | 40% |
| Above 35 | 8 | 53% |

Your region or country

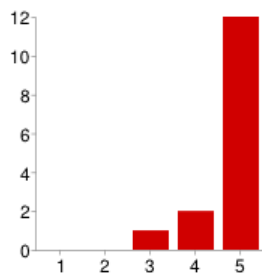
|        |
|--------|
| jordan |
| USA    |
| Jordan |
| Jordan |
| KSA    |
| Amman  |
| UAE    |

You Educational level?



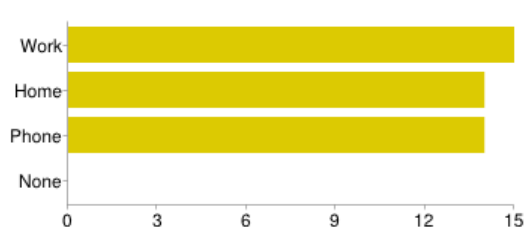
|                                |    |     |
|--------------------------------|----|-----|
| No degree                      | 1  | 7%  |
| Collage                        | 1  | 7%  |
| Baccalaureate degree or higher | 13 | 87% |

**Rate how much are you comfortable about working on a computer?**



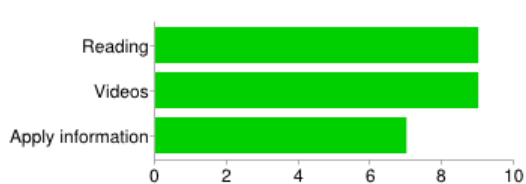
|   |    |     |
|---|----|-----|
| 1 | 0  | 0%  |
| 2 | 0  | 0%  |
| 3 | 1  | 7%  |
| 4 | 2  | 13% |
| 5 | 12 | 80% |

**Where can you access internet?**



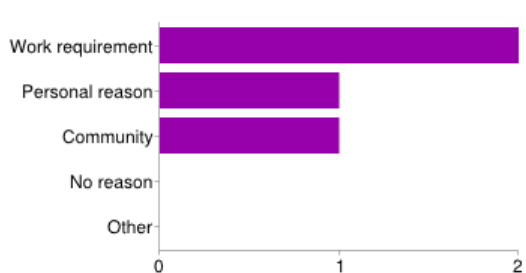
|       |    |      |
|-------|----|------|
| Work  | 15 | 100% |
| Home  | 14 | 93%  |
| Phone | 14 | 93%  |
| None  | 0  | 0%   |

**You process information best by?**



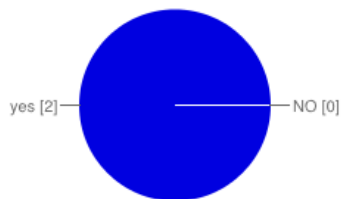
|                   |   |     |
|-------------------|---|-----|
| Reading           | 9 | 60% |
| Videos            | 9 | 60% |
| Apply information | 7 | 47% |

**Why would you choose to learn new skills?**



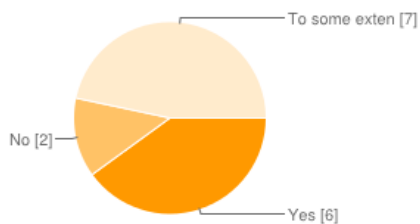
|                  |   |     |
|------------------|---|-----|
| Work requirement | 2 | 13% |
| Personal reason  | 1 | 7%  |
| Community        | 1 | 7%  |
| No reason        | 0 | 0%  |
| Other            | 0 | 0%  |

**Did you had a training in Microsoft Excel before?**



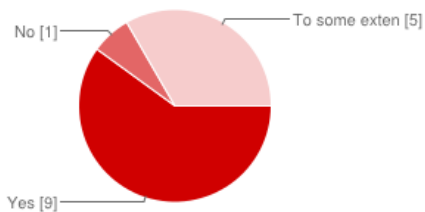
|     |   |     |
|-----|---|-----|
| yes | 2 | 13% |
| NO  | 0 | 0%  |

**Do you have proficiency in using excel?**



|                |   |     |
|----------------|---|-----|
| Yes            | 6 | 40% |
| No             | 2 | 13% |
| To some extent | 7 | 47% |

**Do you think that learning excel would help you in your entrepreneurial life to execute your financials?**



|                |   |     |
|----------------|---|-----|
| Yes            | 9 | 60% |
| No             | 1 | 7%  |
| To some extent | 5 | 33% |

**The best language I would like to use while learning is?**

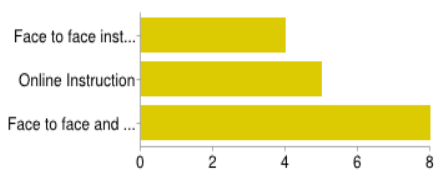
Arabic

English

**What would be your biggest concern when learning new software?**

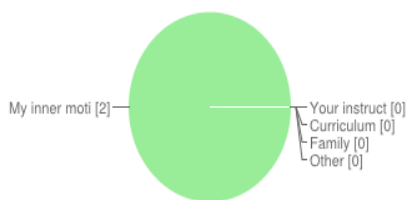
- Instruction and how it's delivered
- Time - Cost
- New hard software
- don't figure out how it is going to help my business
- Time
- It's usability...
- lack of grasp

**You learn best by?**



|                                     |   |     |
|-------------------------------------|---|-----|
| Face to face instruction            | 4 | 27% |
| Online Instruction                  | 5 | 33% |
| Face to face and online instruction | 8 | 53% |

**You will learn best because of**



|                 |   |     |
|-----------------|---|-----|
| Your instructor | 0 | 0%  |
| Curriculum      | 0 | 0%  |
| Family          | 0 | 0%  |
| My inner motive | 2 | 13% |
| Other           | 0 | 0%  |

**Can you describe your worst training experience you had in the past if any? what happen?**

PMP course, because of time and efforts. This course started from 7 to 11 at night, and we already working  
 Having the same context for two courses but the with two different names

**Comments**

Excel is one of the most important program in the engineers life