PROJECT PORTFOLIO

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GENERAL DAMAGES CURRICULUM

Situation **Role** **Approach** **Outcome** **Reflection**

Competency Tags

- Curriculum Design
- LTEM
- Change Management
- Stakeholder Mgmt.
- Needs Analysis
- Agile Project Mgmt.
- Blended Learning

01 SITUATION

Claim handlers were evaluating general damages inconsistently, costing the business millions of dollars annually. The Liability business unit developed a new scaling methodology and needed training to drive adoption across Auto and General Liability.

02 ROLE

Led the full project as designer and project manager, from initial scoping through launch and iteration. Extended the business' initial request by conducting a needs analysis with stakeholders to define success measures, intended behaviors, and what skill transfer would look like on the job.

03 APPROACH

Methods & Frameworks

I used ADDIE for instructional design and Agile for project management. In practice, that meant two-week development sprints with built-in stakeholder review checkpoints, which proved essential when the business moved the deadline up two months mid-project. Iterative development allowed the team to absorb that shift without restarting, because sign-off on completed modules was already in-hand.

Format Decisions

The blended format was a deliberate choice: e-learning in Rise and Storyline 360 with branching scenarios to establish conceptual understanding of the methodology, paired with facilitator-led regional sessions to develop the judgement and decision-making skills that knowledge transfer alone cannot produce. Supplemented with facilitator and learner guides, a calibration guide for ongoing office-level practice discussion, a laminated quick reference guide, and statement guides giving claim handlers specific language and questions for assessing damages on litigated claims.

Scenario Design

Partnered with SMEs across Auto and General Liability to build a robust library of scenario-based cases drawn from real claims, including actual damage photos and realistic case progressions. Added “what if” extensions to each scenario so learners could test how their evaluations might shift under different conditions.

03 APPROACH

Redacted Example of Desk Reference Guide

GENERAL DAMAGES EVALUATION METHODOLOGY

DESK REFERENCE GUIDE

	LOW	MEDIUM	HIGH
Scale component & Definition	E.g., Minimal impact to work and daily activities	placeholder text	placeholder text
Scale component & Definition	placeholder text	placeholder text	placeholder text
Scale component & Definition	placeholder text	placeholder text	placeholder text
Scale component & Definition	placeholder text	placeholder text	placeholder text
Scale component & Definition	placeholder text	placeholder text	placeholder text
Scale component & Definition	placeholder text	placeholder text	placeholder text
Scale component & Definition	placeholder text	placeholder text	placeholder text
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03 APPROACH

Evaluation

Designed the curriculum to address LTEM levels 1-6, from attendance through on-the-job decision-making. Post-rollout, I requested a review from our Learner Experience team, who interviewed several hundred claim professionals on their experience with the training.

Alternatives Considered

Early in the process, a fillable PDF was proposed that would allow learners to record their general damages ratings as they assessed a claim. I developed an MVP of the form and, after witnessing how claim handlers actually work, it was clear the tool didn't reflect their real workflow and would add friction rather than support performance. The tool was not further developed.

03 APPROACH

Advocating for the Learner

The most significant design challenge was scope. Business partners wanted to incorporate every piece of information that could conceivably be relevant to a general damages evaluation, including the biomechanics of whiplash, medical guidelines on injections, and the science behind assessing causation. I argued that claim professionals needed to learn the new evaluation framework and how to apply it to their claims, not become medical experts. After sustained pushback, we reached a compromise: all supplementary content was moved to an optional resources section, keeping the core learning path streamlined and focused on the new work process.

A similar dynamic played out in content development, where SMEs initially wanted line-by-line co-authorship of every resource. I established a working agreement mid-project that kept SME input at the review stage and placed design and editorial decisions squarely with the learning team. This boundary protected both the timeline and the quality of the final product. The working agreement was refined and is now used across the learning org by other designers.

Stakeholder Environment

Business partners operated in silos with limited cross-functional communication and were under considerable time pressure — at one point their deadline shifted forward two full months without explanation. Decision-making required multiple sign-offs across stakeholders who didn't always agree, which created delays throughout development. To hold the project together, I maintained a standing weekly checkpoint with key stakeholders, documented decisions in writing, and tied design rationale explicitly to the agreed-upon success measures so scope disputes had a stable reference point. Keeping those relationships functional while protecting learner-centered design decisions was a consistent demand alongside the design work itself.

04 OUTCOME

1,854 e-learning completions after six months. Post-launch survey (n=754): 70% of learners extremely or very satisfied with the e-learning; 59% extremely or very satisfied with the in-person facilitated sessions; 80% reported having adequate tools to evaluate general damages after implementation.

The curriculum was designed to measure through LTEM Level 6, with on-the-job decision-making as the intended endpoint. At Levels 1-2, completion and satisfaction data were captured through the LMS and post-launch survey. At Level 4, I requested the Learner Experience team conduct structured interviews with several hundred claim professionals on knowledge application and workflow integration. Levels 5-6 — whether evaluation decisions actually improved and whether the financial impact of inconsistent evaluations decreased — were the intended measures but were not ultimately captured, as the business did not build a post-rollout performance tracking process. That is a monumental gap: the curriculum was designed to support measurement at those levels, but measurement requires infrastructure on the business side that wasn't in place.

One informal indicator of adoption: the quick reference guide was voluntarily laminated and placed on desks across the Auto claims organization, for roughly 8,000 employees. Seeing this on a site visit was a surprise and a highlight of my ID career.

05

REFLECTION

Co-authorship with SMEs delayed development significantly and is not an approach I would repeat. Establishing a working agreement earlier (ideally at kickoff) would have better protected the timeline and is a core part of my project management process now. I would also push harder at the outset to define the boundary between core content and supplementary resources, rather than negotiating mid-build under pressure.

STEP INTENSIVE CLASSES

Situation **Role** **Approach** **Outcome** **Reflection**

Competency Tags

- Facilitated Class
- In-person Activities
- Iteration
- Blended Learning

01 SITUATION

Travelers claim field was **struggling to recruit and retain** Technical Specialist-level liability professionals across lines of business, while a large pool of intermediate claim reps remained **siloed** in their respective lines with **no structured pathway** to advance. Technical Specialists are senior claim professionals who handle complex, high-exposure, and litigated claims; reaching that level requires breadth across lines that the standard career track does not provide. STEP was designed to close that gap: a nine-month cohort program in which 30 claim reps dedicate 50% of their work time to **structured upskilling across LOBs** — a substantial organizational investment reflecting how acute the recruitment and retention problem had become.

02 ROLE

Owned end-to-end design and project management of **both week-long intensives** within a nine-month cohort program, including learning objectives, activity design, facilitator guides, learner guides, branding, and presentation design. Built and maintained the NovoEd platform and Rise 360 infrastructure supporting both events.

03 APPROACH

Format

The default approach to in-person classes at Travelers had been **lecture-heavy**, and facilitators had a strong preference for maintaining that format, including **in-class self-paced e-learning modules**. That format was the wrong fit for this population: intermediate claim reps accelerating toward Technical Specialist roles needed to develop cross-line judgment, comfort with ambiguity, and the leadership presence expected at the TS level — none of which lecture or self-paced content reliably produces. Both intensives were designed to **replace passive instruction with hands-on, collaborative, discussion-based learning**, with substantive segments built around activities rather than presentations.

Platform

The NovoEd platform shell served as the connective tissue between the intensives and the broader nine-month program — housing pre-work, post-session resources, and assignments that extended learning between in-person events. Building the infrastructure from scratch required translating the program's instructional sequence into the platform's architecture, including access sequencing, cohort groupings, and resource organization across both semesters.

03 APPROACH

Activity Design

The most deliberate structural decision across both intensives was the **reciprocal teaching model**. In Intensive 1, General Liability participants learned Auto Liability concepts while Auto participants reinforced their own knowledge by teaching and leading discussions with their GL colleagues. Intensive 2 inverted that structure: Auto participants learned GL while GL took on the expert and leadership role. This design served two purposes: **content acquisition** for the learning cohort and **leadership skill development** for the expert cohort, reflecting the cross-line fluency and instructional presence expected of TSs.

Within that structure, I selected individual activities to build specific skills. In Intensive 1, negotiation **role-plays** gave participants low-stakes repetition on a high-stakes skill; motion practice **simulations** required them to apply litigation concepts under time pressure with **peer accountability**. In Intensive 2, task force exercises required small groups to coordinate across lines on a shared investigative problem, building the **collaborative judgment** the TS role demands.

03 APPROACH

Redacted Example of Facilitator Guide & Activity

Section 1.2 – Personal Auto Policy

Section Time: 2.5 hours

Facilitator Preparation

- 6-7 flipcharts with enough markers for everyone
- Printouts of policy segments for teachback activity
- Links:
  - Facilitator PowerPoint
  - Online Learner Guide
  - Meeting Link

Objectives

Learners will be able to name the segments of the personal auto policy (in contrast to the GL policy), where to find key information from claim examples, and make a coverage decision based on scenario claim facts.

Personal Auto Policy Overview – 45 mins

Table Group Activity - 20 mins

- Instruct participants to access the Auto Policy Overview in their learner guide, which contains detailed prompts and examples.
- The auto rep in each group explains the sections of the policy to the GL members and answers questions.
- The groups should all prepare 1-2 takeaways and/or questions.

Large Group Discussion - 25 mins

Bring the larger group back together for discussion. Debrief the main teaching points below:

- Section 1 *[details redacted]*
- General Provisions *[details redacted]*
- Damage to your Auto *[details redacted]*
- Liability Coverage Section *[details redacted]*

Collision vs. Comprehensive Quick Fire - 15 mins

- Using the facilitator PowerPoint, display each scenario below one at a time. Participants must respond whether the scenario is collision or comprehensive *and they must provide a rationale*.
- Once the scenario is displayed, allow groups to confer with one another for one minute.
- When time is up, teams can buzz in.
- Each correct response is worth 5 points.
- Feel free to do the first one together as an example.
- Correct answers are in the Notes section of the facilitator PPT.
- When you finish all scenarios, ask participants if they have any questions before moving on to the next segment.

Scenario	Answer
[SCENARIOS REDACTED]	

04 OUTCOME

48% of participants have already been promoted to TS roles six months into the pilot — the primary outcome the program was designed to produce. Among the 30 participants who attended both intensives, **93% rated each as very or extremely valuable**. When asked which program component helped them learn the most, **69% ranked the intensives first**, ahead of workshops, self-paced learning, and assignments developed by other team members. Learner feedback identified a desire for more advanced content on severity and litigation, which is informing the next iteration.

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REFLECTION

The original intensive design placed too much emphasis on cross-line knowledge transfer and not enough on the litigation and negotiation skills a TS actually needs to perform at that level. In the **revised intensive proposal** I developed, the first 1-2 days separate the cohorts — Auto participants build foundational GL concepts, GL participants build foundational Auto concepts — then bring them together for the remaining three days for a skills-based program with litigation concepts threaded throughout from the start rather than introduced late. That structure preserves the cross-line fluency goal while reorienting the bulk of the program around the judgment and advocacy skills the role demands, rather than rote knowledge of policy language.

BIAS IN AI TRAINING OUTLINE

VIRTUAL INSTRUCTOR-LED TRAINING (VILT)

Situation **Role** **Approach** **Outcome** **Reflection**

Competency Tags

Action Mapping

Research

VILT

01 SITUATION

View Action Mapping Exercise here for a detailed analysis of this project's situation and approach.

02 ROLE

Conducted needs analysis and stakeholder interviews to assess the context for training on bias in AI for an audience of instructional designers and facilitators.

03 OUTCOME & REFLECTION

The solution was not ultimately adopted, as other priorities were deemed more urgent. However, this work sample illustrates my ability to critically analyze a need based on the information in my environment, act on it, and propose dynamic, compelling solutions.