



Charles Schwab Internship Academy Instructional Design Internship

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Overview

During the summer of 2018, I had the incredible opportunity to participate in the Charles Schwab Intern Academy at the Charles Schwab campus in Lone Tree, CO. For nine weeks, I worked under the Human Resources umbrella within Talent & Organizational Development, where my role was “instructional design intern” within the team that creates business learning, specifically regulatory and compliance training. This extremely thorough and hands-on experience proved to be invaluable to my growth in the instructional design field. I was continually impressed with the overall company culture and was excited to see that they truly live their brand and values and continually do everything through the “eyes of the client.” At Schwab, the client truly does come first.

Summer 2018 marked the fifth year of the award winning Internship Academy program, however it was the first year that HR had interns. There were four HR interns total, and I was privileged to be one of the two in the instructional design track. Overall the program had roughly 200 interns representing 32 universities, spread across various cities. (Approximately 68 interns in the Lone Tree, CO campus where I resided) The program has interns working 80% of the time in their business track and 20% of the time participating in shared learning with other intern cohorts over nine weeks.

Learning Objectives

Upon starting the internship, I sat down with my manager, Sheri and we came up with some learning objectives goals for the program. Of course, leaving room for any other opportunities that would present themselves over the course of the nine weeks.

Business Objective

- Contribute to department goals in creating efficient and effective learning experiences for Schwab employees

Professional Development

- Gain exposure to eLearning development tools (Storyline)
- Gain a better understanding of WCAG requirements
- Discover best practices for developing training materials in a variety of modalities
- Compare real world environment to academic experiences

Internship Experience

The following is a list of projects and learnings that I experienced in my time at Schwab. Note that I am unable to get overly detailed in project specifics due to confidentiality requirements for such a regulated industry.

Project Specific Learning

• Enterprise Risk Management Training (ERM)

eLearning training modules were created before I arrived, however it was my honor to re-purpose the online modules to paper/pdf format for Charles Schwab himself, to use to complete his compliance training and tests. As an intern, I was required to take this training as well.

• Vendor Oversight Training (WCAG)

This eLearning project allowed me to learn about sensitivities to visually and hearing impaired individuals that participate in the training. Tasks included organizing tab order, creating story boards for internal client reviews, and participation in the peer review process before training is launched.

• Mutual Fund Late Trading

I shadowed a Schwab instructional designer who was tasked to improve an existing eLearning course to find ways to make it more engaging, in addition to working with SMEs to determine if current information is accurate or in need of updating. Assessments in this training were scenario-based and this is where I learned a lot about how to make scenario questions more engaging.

• Career Exploration Pathways Module 3 — Know the Schwab Business

CEP is a new program with a total of 5 self-paced modules, providing professional development for employees

who are re-assessing current roles within the organization. It helps narrow focus of interests and aids developing a plan for the employee's future. I was fortunate enough to develop Module 3 of this program. I curated content from Harvard Learning courses and Schwab-specific resources. Tasks included curating content, organizing content, designing activities, and using my writing skills. A bonus learning for me was that I was able to dig deep into the 15 Schwab business enterprises to create an internet scavenger hunt, which gave me a richer sense of what the company does as a whole.

- **Key Recovery Team Training (BCIM Business Continuity Incident Management)**

I shadowed another instructional designer during this eLearning project and was able to contribute to ideation around how it could be updated after showing up in its current form for several years. I was excited to pull in my graphic design skills to contribute graphics to this project and present rationale behind them and the work I'd done on client calls.

- **Team Building Toolkit**

A need had been identified within the organization to have a central place for team leaders to self-diagnose what stage their team is in (especially when in a state of unresolved) and select off the shelf team building activities that they could facilitate themselves. Team stages are based on the Team Performance Model by Drexler/Sibbet. Myself and the other instructional design intern created a self-diagnosis piece to aid team leaders in addition to a template in which team building activities could be created. Activities were sourced and reconfigured from The Grove, Gallup Strengths and Harvard Learning into a simple format that team leaders could use. We built out 18 team building activities ready for immediate use and the project will keep growing and evolving as more activities are added. This was a great exercise in "simplification" of content.

- **Learning Architecture Infographic**

I engaged in conversations about a new learning architecture system that will be implemented at Schwab. I learned a lot about Learning experience platforms, content management systems and learning record systems. I conducted interviews with people in varying roles that will be affected by the new system to identify areas of benefit and impact for them and finally, turn my findings into an infographic where I was able to showcase some of my graphic design skills.

Other Learning

- Opportunities to sit in on client calls and WebEx meetings and observe processes and varying project management styles
- Attend weekly team design meetings and other team meetings
- One-on-one weekly meetings with my manager
- Participate in executive meet and greets
- Participate in EVP meet and greets
- Participation in All-hands, Round-Table and Town Hall meetings
- Participate in required company training (ERM, Harassment, etc.)
- Attend and participate in usability testing via the Talent Acquisition Department
- Facilitated basic Adobe Illustrator tips and tricks learning session for instructional designers in the regulatory and compliance training department.

Internship Academy Specific Events

- Week 1 – Conversation with Walt Bettinger, CEO
- Week 2 – Schwab Strengths Assessment and workshop (Clifton Strengths Finder via Gallup)
- Week 3 – Financial Health discussion
- Week 4 – Business Challenge Discovery and Planning
- Week 5 – Business Challenge Summit (Shark Tank Style in teams of 5)

- Week 6 – Career Journey Panel
- Week 7 – Executive Meet and Greets (10 total)
- Week 8 – Informal Leadership, Emotional Intelligence focus
- Week 9 – Capstone Summit presentations
- Participation in National Intern Volunteer Day (Boys and Girls Club Reality Store)
- Client Interaction Overview Webinar (showcased Schwab culture through the eyes of the client with sample phone conversations)

A-ha! Moments and Insights

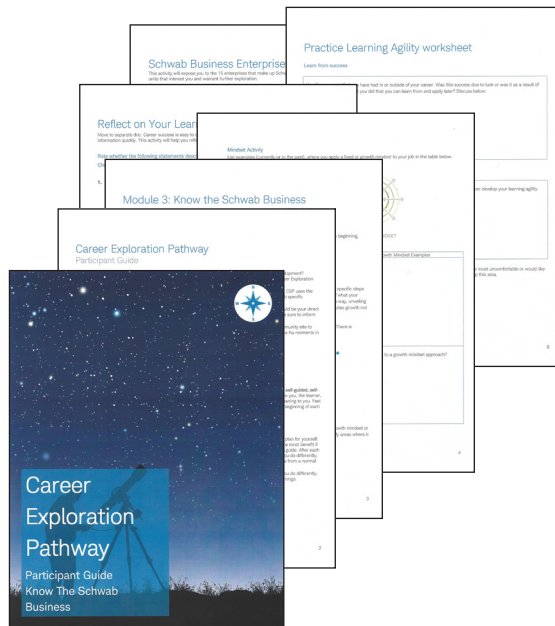
- I have a much better sense of how to translate my graphic design skills to instructional design. I see how graphics often must be viewed with a different lens than what I have been used to in the creative field of advertising and marketing. There's a fine line between designing things to simply "look cool" (design for design sake) vs. designing to highlight and allow learners to better engage with important content.
- To be successful as an instructional designer in a place like Schwab, project management, relationship-building skills and the ability to be flexible are as important as the design skills.
- The answer to "how to make eLearning modules engaging while adhering to accessibility, brand standards and regulatory requirements" is not clear to me yet.
- I need to stop getting hung up on the title "instructional designer." There are many roles out there that encompass my skills sets but may be called something else. For example, "Learning Consultant."
- My experience with qualitative focus group moderation can translate into facilitation for learning better than I thought.
- I would like to know more about HTML5 and xAPI
- This experience confirmed that I do want to be in a business learning environment, especially one where I can contribute to talent development.

Conclusion

I feel very lucky to have been chosen to work as one of the first HR instructional design interns at Charles Schwab. The people I worked with were incredibly smart, helpful, patient and kind. My manager's (Sheri) efforts to make sure that I had a thorough and realistic experience of what it's like to work at Charles Schwab were not gone unnoticed. I never felt like "an intern" there. I felt like part of the team and I got a huge boost in my professional development by participating. Combine that with the amazing culture of the company overall, I would be honored and lucky to find a full time position at Charles Schwab.

Appendix

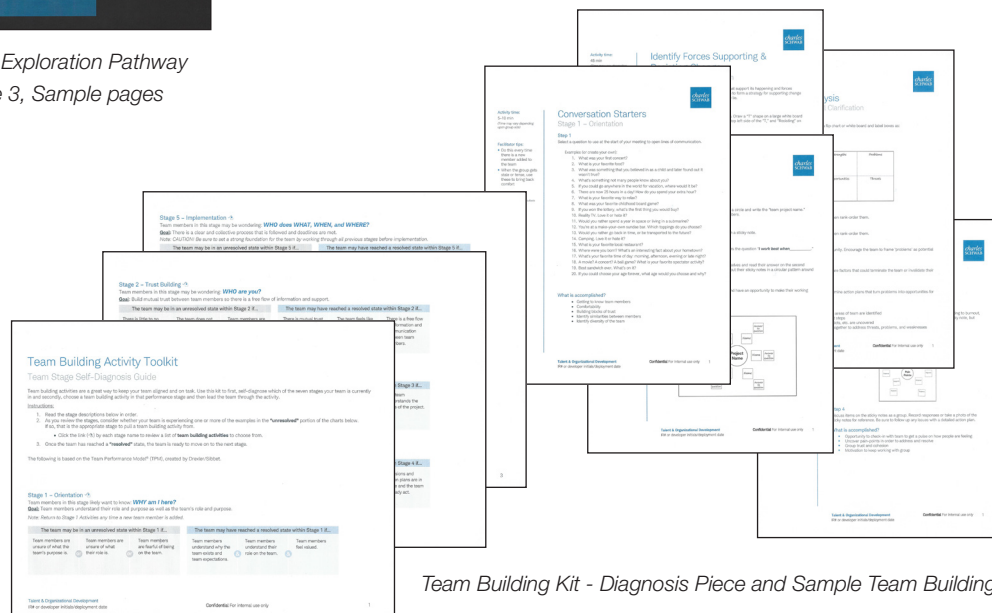
These work samples purposefully do not show detail due to confidentiality and regulatory policies. They are intended to just give a sense of some of the work done over the 9 week internship.



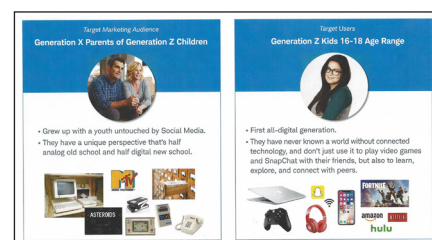
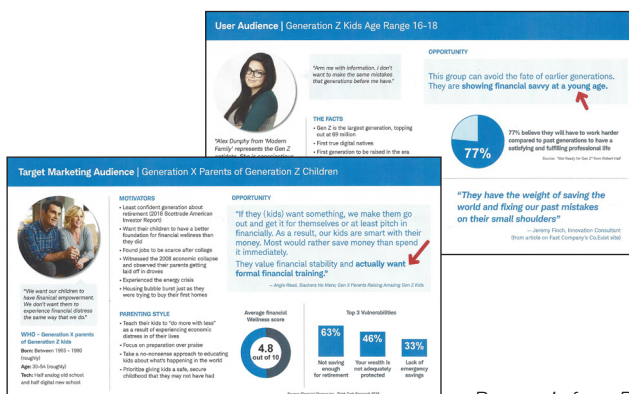
Career Exploration Pathway
Module 3, Sample pages



Learning Ecosystem Awareness Infographic



Team Building Kit - Diagnosis Piece and Sample Team Building Activity Sheets



Persona's from Business Challenge Summit Project

Appendix

Certificate of Completion

Schwab
Intern
Academy

Certificate of Completion awarded to
Michelle Sroda

Thank you for investing your summer in the 2018 Schwab Intern Academy. We're grateful to have been part of your career journey and hope your experience as a "Schwabbie" will help inform the next steps in your professional life. On behalf of all of us at Schwab, I wish you great success wherever your future takes you.



Walter W. Bettinger II
President and Chief Executive Officer



Own your tomorrow.

Appendix

Photos from the experience.



The first HR Interns to go through the Charles Schwab Internship Academy. Michelle, Emily, Roo, Hannah.



Intern cohorts at Happy Hour.