

PJ Enterprises Design Document

April 19, 2020

Purpose

The purpose of this training is to provide a framework for employees to follow when recommending products and services to customers. This training will boost employee confidence and enhance customer service skills to increase both customer and employee satisfaction through ongoing training and incentive programs.

Please Note: Per Change Request #3, it was decided and approved that the training will be a combination of computer based training and in-person role play rather than face-to-face training.

Target Audience:

- Telephone Operators

Prerequisite Knowledge

- Customer service experience
- Call center experience, phone operations
- Basic computer skills, Microsoft Office, catalog software

Learner Characteristics

- Age range | 18-62
- Gender | 85% Female – 15% male
- Education level | high school diploma – Master's Degree
- Experience level | 6 months – 35 years
- Learning preferences | 75% Kinesthetic – 15% Visual – 10% Verbal/Aural
- Attitude toward training | 60% positive – 40% negative
- Perceived learning needs | 60% don't oppose training - 40% don't need training
- Role perceptions | 25% would like to advance – 75% there is nowhere to advance to
- Socioeconomic status | low to middle class

Application of Learning Theory:

As adult learners, the telephone operators (learners) would associate well with Knowles' theory of andragogy. Factors would include the ability to be self-directed and self-motivated with an internal desire to succeed well in their own performance. With previous learning experiences, these adult learners understand their own strengths and when to focus on their challenges. Adult learners want to take part in their own evaluation of their learning experiences and find more motivation when they have control over their own learning. Real-life scenarios and problem-centered training appeals most to this group of learners. Given these factors, telephone operators will also want the opportunity to have some self-direction in their learning situation and will learn best with some variety of learning materials to reinforce the concepts rather than a single one-shot module.

Training Format:

Computer-based training and in-person role play

Application Criteria:

- Approachability
- Patience
- Empathy
- Assertiveness
- Politeness
- Product Knowledge

Learning Environment

- Training will occur onsite during working hours and employees will be compensated
- Onsite training will take place in a training classroom space, with air conditioning and adequate lighting
- Training classroom or conference room with multiple computers to access computer-based training via CD.
- Computers for learners to use must have Windows 10 operating system, Microsoft office and Adobe Reader software.
- Computer and a projector for the trainer to use to display training presentation and/or job aids.
- Onsite training will allow for both online training and role playing.

1. Terminal Objective: The telephone operator will determine type of materials (job aid, catalog) to facilitate positive customer interactions during a customer call.

Enabling Objectives	Absorb Activity	Do Activity	Connect Activity
<p>Given the company's training website, the telephone operator will locate the appropriate job aid for the query with 100% accuracy.</p>	<p>Review of training website sections; worksheet that lists each section and what can be found there (PDF) for reference</p>	<p>Quiz -sort which query can be answered best by which section of the website</p> <p>Assessment Quiz score must be 100% before the telephone operator can move to the next module. Telephone operator can take the quiz until they reach that goal.</p>	<p>Describe in a short written observation the ease or difficulty in locating the appropriate job aid on the website.</p> <p>Assessment: Customer service supervisor reviews connect activity results and relays any findings to project sponsor for follow up in future on website usability.</p>
<p>Given the job aid, the telephone operator will recall the definitions of key company terms with 100% accuracy.</p>	<p>Reading: Job aid -on website and in PDF for reference</p>	<p>Quiz: matching terms to key definitions</p> <p>Assessment: Quiz score must be 100% before the telephone operator can move to the next module. Telephone operator can take the quiz until they reach that goal.</p>	<p>Outside of the quiz terms, provide written reflection of at least two terms that are particularly important to performing the telephone operator job with success.</p> <p>Assessment: Discussion online with other students and with input from the Customer Service Supervisor.</p>
<p>Given the company catalog, telephone operator will locate 3 given products with 100% accuracy within 7 minutes.</p>	<p>Reference: Company catalog (Past Spring catalog)-this is serving as a representative of all catalogs as the template is the same Reference: New Company catalog for role play</p>	<p>Quiz: 3 products given; telephone operator must be able to locate all three products by typing in the correct page number and criteria within the 7 minute limit.</p>	<p>Role play with Customer Service Supervisor-new product given to search in current catalog</p>

Assessment:

Quiz score must be 100% before the telephone operator can move to the next module. Telephone operator can take the quiz until they reach that goal.

Assessment:

Reflection with Customer Service Supervisor about role play connect activity

2. Terminal Objective: Given customer service scenarios, telephone operator will positively answer customer questions and place a basic order with no errors.

Enabling Objectives	Absorb Activity	Do Activity	Connect Activity
<p>Telephone operator will apply customer-centered communication approaches during interactions with customers.</p>	<p>Telephone operator will read and/or listen to audio of customer interactions that highlight successful customer-centered communication</p>	<p>Practice/Apply Scenario Quizzes: Telephone operator will examine various scenarios and apply correct responses such as personalizing, empathizing, and strategizing in various scenarios.</p> <p>Assessment: Quiz score must be 100% before the telephone operator can move to the next module. Telephone operator can take the quiz until they reach that goal.</p>	<p>Telephone operator can review and use job aid with popular customer-centered responses.</p>
<p>Telephone operator will correctly identify approaches to customer-centered communication and recognize when to use them.</p>	<p>Telephone operator will read and/or listen to audio of customer interactions. This will help them connect with the customer, discover needs, provide solutions, and confirm satisfaction, etc.)</p>	<p>Practice/Identify Scenario Quizzes: Telephone operator will role play via online scenarios and apply predefined customer – centered approaches to various scenarios.</p> <ul style="list-style-type: none"> ● Connect ● Discover Needs ● Offer Solutions ● Confirm Satisfaction <p>Assessment: Quiz score must be 100% before the telephone operator can move to the next module. Telephone operator can take the quiz until they reach that goal.</p>	<p>Telephone operator can use job aid with popular customer-centered responses/statements for Connect, Discover Needs, Offer Solutions and Confirm Smartification statements</p>

Assessment Summary

The various assessments used through the lessons are designed to teach the telephone operators what tools they have available to them during the intake of a call, such as catalogs, job aids, and processes. The tools will enable the operator to complete calls within the 10-minute window, with the following criteria:

- Short hold times
- Answer product information from the catalog with accuracy
- Wrap up the order in a timely manner

Roleplay with recorded call	Assess telephone operator's ability to use job aids to find catalog information & answer with customer centered responses.
CBT Quiz	Scored knowledge check 100% to pass.
Worksheet Quiz	Sorting sections, short written essay for ease of use in locating job aid
Scenarios Quiz	Responses assessed with predefined approaches 100% to pass.

Evaluation Plan

Formative

The training will be broken down into small groups of telephone operators due to constraints of having a 24/7 call center environment. The first group of telephone operators will be the pilot training in which we can make minor adjustments to the training if any is needed for the future training. A variety of activities including reading, roleplaying with recorded calls, using job aids during roleplay and quizzes within the CBT will benchmark and assess the learning.

Summative

A course evaluation will be conducted online anonymously on the final day of training, prior to telephone operators leaving the class. The evaluation will cover whether the telephone operator felt the course was effective, was presented in a way they could easily understand, whether they felt the instructor had full knowledge of tasks demonstrated, and if they feel more training is necessary. The information will be extremely helpful in the pilot program and then when continuing the training to ensure the information is in fact giving students necessary skills moving forward.

Confirmative

After a period of 2-4 months, the instructional design team will return to meet with supervisors and trainer, review the customer service surveys, and if needed, observe the telephone operators in the call center to see what, if any, updates to the training program are needed or if the issues are behavioral, and make recommendations.