PJ Enterprises Gap Analysis
March 22, 2020

Project Description

Currently PJ Enterprises, a mail-order catalog business, is failing to meet its goal of delivering quality service. Issues the company is currently experiencing include:

- Telephone operators response times to callers is three per hour (half of the target of six calls per hour)
- The call system is currently at 85% capacity, and it is designed answer 90% of calls within two minutes.
- Customer complaints about customer service representatives include:
  - Poor telephone etiquette (soft skills)
  - Inadequate product knowledge
  - Trouble in answering questions

Due to the nature of the business, there is a direct correlation between revenue, call volume and sales; it is necessary to address the company's poor customer service issues.

Based on previous performance and training issues, PJ Enterprises has requested a redesign of quarterly training for telephone operators and customer service supervisors. Creating new training will help PJ Enterprises to meet financial and customer satisfaction goals in addition to employee satisfaction. A gap analysis is needed to assess and ensure the training will meet the company's goals (customer satisfaction, financial and employee satisfaction).

Project Gap Analysis Strategy / Information Needed

To understand and identify the gap between the current and desired states, Team 2 will need the following type of information:

- Sales data / organizational goals
- Existing practices for employee performance standards and development
- Current training materials and requirements for attendance and conditions compatible for training.
- Customer satisfaction feedback/surveys
- Phone call metrics/reporting

Team Strategy

We will use the following methods to collect the needed information, metrics/reports and documentation:

- Anonymous Surveys: Customer service supervisors and telephone operators.
- Interviews: Conducted with management, customer service supervisors and telephone operators
- Observation: Customer service supervisors and telephone operators will be observed.
- Documents and data: Existing data and data from the needs assessment will be collected and analyzed.

Analysis Plan

Our analysis includes the following methods:

Activity/Method	Purpose or Information You Hope to Gain	Person Responsible
Survey	• Employee perceptions and satisfaction on a variety of topics (job, management, training, resources, incentives, etc.)	Instructional Designer
Interview / Management	• Their perception of the customer service supervisors' performance • Employee meeting goals, expectations, and attendance • Overall goals for company and how they see training fitting into those goals • Opinions on employee morale	Hiring Manager/HR
Interview / Customer Service Supervisors (SMEs)	• Process followed for low-performance telephone operators and/or telephone operators not requirements • Types of customer issues being forwarded to them from telephone operators • Follow-up procedures with operators after a call has been forwarded	Instructional Designer and/or Business Analyst
Interview / Telephone Operators	• How call volume is managed • Perception of incentives offered, motivation • Perception of customer service procedures • Formal and informal communication policies and procedures	In Instructional Designer and/or Business Analyst
Observation (Telephone Operators)	• The current process on the phone, • Environment and equipment (tools for the job)	Instructional Designer and/or Business Analyst

Activity/Method	Purpose or Information You Hope to Gain	Person Responsible
Observation (Supervisors)	• What type of calls are they handling • The current process supervisors follow for issues and/or handling high/low performers on the phone • Environment and equipment (tools for the job)	Instructional Designer and/or Business Analyst
Data from customer surveys on operators/metrics	Multi-year metrics comparisons	Instructional Designer and/or Business Analyst
Data from current training	Analyze current training materials and review PowerPoints	Instructional Designer

Questions to Ask: Create Survey for Telephone Operators and Customer Service Supervisors – by Instructional Designer

Create a survey that is intended for information from the target audience of telephone operators and customer service supervisors.

Survey: Employee Opinion

Which of the following best describes the department you work in?

- Manufacturing
- Marketing
- Customer Service
- Management
- Human Resources

How long have you worked at this company?

- Less than 6 months
- 6 months to 1 year
- 1-2 years
- 3-5 years
- More than 5 years

Overall, how satisfied are you with your position at this company?

- Very satisfied
- Somewhat satisfied
- Neutral
- Somewhat dissatisfied
- Very dissatisfied

I know the requirements of my job.

- Strongly agree
- Somewhat agree
- Don't agree or disagree
- Somewhat disagree
- Strongly disagree

Do you feel employees are recognized as individuals?

- Always
- Usually
- Sometimes
- Rarely
- Never
- Not sure

How motivated are you to see this company succeed?

- Very motivated
- Somewhat motivated
- Not sure
- Not very motivated
- Not at all motivated

The company is transparent in communication of goals and strategies?

- Strongly agree
- Somewhat agree
- Don't agree or disagree
- Somewhat disagree
- Strongly disagree

Questions to Ask: Interview Management – by Hiring Manager/HR

Interviews: Coaching using the Grow Model (Goal, Current Reality, Options, Will or Way forward)

Using the SMART Goal format (Specific, Measurable, Attainable, Realistic, Timely)

1. What future goal/s do you want to achieve?
2. What do you want to accomplish?
3. Is there anything you would like to change?
4. What is working well for you?
5. What could you do differently?
6. Do you see opportunities for growth?
7. What obstacles are getting in the way of your success?
8. What support do you need to be successful?

9. What do you feel your role is in helping to support customer supervisors and telephone operators?

Questions to Ask: Interview Customer Service Supervisors (SMEs) – by Instructional Designer and/or Business Analyst

Interviews: Coaching using the Grow Model (Goal, Current Reality, Options, Will or Way forward)

Using the SMART Goal format (Specific, Measurable, Attainable, Realistic, Timely)

1. What future goal/s do you want to achieve?
2. What do you want to accomplish?
3. Is there anything you would like to change?
4. What is working well for you?
5. What could you do differently?
6. Do you see opportunities for growth?
7. What obstacles are getting in the way of your success?
8. What support do you need to be successful?
9. What are the top five customer issues forwarded to you by the telephone operators?
10. How often do these occur? What frequency proportions would you assign to this list of customer issues?
11. Can you describe the follow up process that occurs with operators after a call has been forwarded to you?
12. If this were your company how would you change the process?
13. What feedback do you receive from management?
14. Do you feel your company supports training around your program?
15. Does your company offer additional training, online Skillport training, or and education program such as tuition reimbursement?
16. What type of training did you receive when you started your current role?

Questions to Ask: Interview Telephone Operators – by Instructional Designer and/or Business Analyst

Interviews: Coaching using the Grow Model (Goal, Current Reality, Options, Will or Way forward)

Using the SMART Goal format (Specific, Measurable, Attainable, Realistic, Timely)

1. What future goal/s do you want to achieve?
2. What do you want to accomplish?
3. Is there anything you would like to change?
4. What is working well for you?
5. What could you do differently?
6. Do you see opportunities for growth?

7. What obstacles are getting in the way of your success?
8. What support do you need to be successful?
9. What would be helpful in making you attend the monthly meetings (online options, call in, compensation)?
10. What kind of feedback do you get from your supervisor?
11. How is your supervisor's feedback useful?
12. How could it change to be more useful?
13. How satisfied are you with your job?
14. What would you change to improve your job satisfaction?
15. Do you feel your company supports training around your program?
16. Does your company offer additional training, online Skillport training, or and education program such as tuition reimbursement?
17. What type of training did you receive when you started your current role?

Questions to Ask: Observe Supervisors – by Instructional Designer and/or Business Analyst

1. In your observation, where do you see the biggest areas of challenge (tone of voice, demeanor, lack of adequate information on products to answer questions, etc.)?
2. In observing customer service supervisors how would you describe their interactions with the telephone operators (positive, supportive, coaching)?
3. In your observation did the supervisor's body language appear open and approachable? Were there other forms of body language displayed?
4. During your observation did the telephone operators seem receptive to the supervisor in a conversation?

Questions to Ask: Analyze company data by Instructional Designer and/or Business Analyst

Objectives:

- PJ Enterprise is looking for aggressive growth to maintain or exceed projected targets
- Maintain profitability
- 10% improvement in quality of customer service
- Focus on the quality of the work culture and staff development and recognition

Once all the data and document information is compiled and analyzed it will help us as designers to see the big picture. What we think is needed now may not be the case at all.

To do this we need to look at documents and note patterns and trends in the data related to the following:

Employee

- Retention
- Length of employment
- Soft skills
- Technology skills
- Most frequently recurring customer service issues
- Top/low scoring operators for customer service scores
- Top/low scoring operators for call completion times
- Fluctuations in timing of complaints
- Types of complaints being forwarded to customer service supervisors
- Review call length data

Human Resources

- Is there an on-boarding process?
- What qualifications (KSA's) required for a new hire?
- Are there on-going evaluations/coaching opportunities?
- Transparency in communications/policy updates

Equipment/processes

- Technology being used
- Telephone equipment/service
- Implement totally on-line catalog
- Updated catalog management software
- Packing and shipping practices updated

Questions to Ask: Analyze Current Training Materials– by Instructional Designer

1. What printed materials are provided?
2. What activities are used in the training?
3. Is there any type of role playing is done in the training?
4. How is the question and answer time facilitated?
5. What does this summary product description look like and is it easy to use?
6. Is the time allocated adequate for the content being covered?

Roadblocks & Dependencies

Team 2 may encounter some roadblocks or dependencies while conducting our gap analysis. Some possible roadblocks and our mitigation strategies include:

Roadblocks/Dependencies	Mitigation Strategies
Technology	Ensure IT management is aware of their role in supporting and collaborating with Team 2.
Surveys are not returned in a timely manner	• Set a positive tone and provide incentive for participation. • Give employees enough time to complete the surveys during work hours. • Identify an SME that will work well between constituencies.
Interviewees are not available or unwilling to participate in timely manner	• Set a positive tone and provide incentive for participation. • Ensure management has communicated and emphasized the importance of the participation in the interviews. • Identify an SME that will work well between constituencies.
Interviewees don't understand the questions or withhold information	Word the questions in multiple ways.
Employee behavior is unusual during observation (self-conscious or atypical)	Ensure and emphasize the goals of an unbiased approach and process.
Data documentation is incomplete	Try to piece together data from other sources to fill in the holes.