

Module 2 Team Paper for Fourward Instructional Design (Team 2)

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Project Gap Analysis Strategy

Information Needed

- Culture of the company and of actual call center (employee/employee relationships, employee/manager relationships)
- Attitudes of employees at each organizational level, common frustrations
- Routines, processes and protocols for operators and managers - preparation for shifts (huddles, etc.), individual calls, routing of complaints and issues
- Current training material/process for call center operators
 - The experience of attending a training on catalogue/new products (if possible)
- Information about what phone system is currently used.
 - When and why was it chosen?
 - Any technical issues with this phone system? System dysfunction or user error?
 - Is it fully understood by the employees - operators as well as customer service managers?

Team Strategy

We will examine the customer response surveys and the current training material. We will also interview operators and managers to get their feedback on a number of issues (training, attitude, response rate, customer feedback, perceived issues with the phone system or process, solicit suggestions from the operators regarding what they think would make their job technically easier, etc).

It would also be helpful to interview Sheena Perez, to see how she went about creating the current training and why she made the decisions she made. Getting insight from her could help pinpoint where specific root issues may be. By interviewing the HR director, we could gain insight into hiring practices and qualities they look for in potential candidates. If needed or determined more beneficial based on company culture, we may also send out an anonymous survey via SurveyMonkey so employees do not feel put on the spot answering questions in person.

Last, a procedural analysis would be very revealing. That would entail spending a day or two (or more if possible) on the floor with the operators, listening, observing interactions between employees, customers and any training we can attend.

Analysis Plan

Activity/Method	Purpose or Information You Hope to Gain	Person Responsible
Interview operators	Hope to gain more insight into what their job is like. What their opinion is about the culture of the call center. What types of things could be causing the customer complaints. Ask them to describe the process they experience in handling customer calls.	Each individual operator
Interview Managers	Find out what their relationship is like with the operators. Find out the opinion of the culture. Find out their opinion about their training and training for operators. What could be causing customer complaints.	Individual Managers
Interview Sheena Perez	Find out how she developed the training for operators. What drove the decision making for the	Sheena Perez

	training. Is money an issue for developing proper training? Her thoughts on the rise of customer complaints.	
Interview HR Director	Find out about hiring practices. What are the qualities of the ideal candidate. Opinions on the high turnover rate.	HR Director
Procedural Analysis	Spend a day/morning or as long as needed, observing the operators, managers and listen in on some calls. Take detailed notes on what is seen and heard. Also include how the managers operate and interact. If possible, sit in on a new product training session.	Individual operators and the managers
Training Materials /Process Review	Understand as deeply as possible what the process is like for operators acquiring product knowledge	Sheena Perez/HR Director

Questions to Ask: [Operators]

- Customer complaints have gone up 30% in the past year. Why do you believe that is?
- What can you tell me about the training you received on new products?
- From your perspective, what is the general attitude or mood among your fellow operators?
- Is there anything that keeps you from doing your best at your job? Any roadblocks that you experience in your role? Are there any issues with the actual phone system?
- Have you used phone systems in other companies that have been easier to use?

- (If they say it's cumbersome) What would make the phone system better so that you could do your job more effectively?
- Describe the average customer you talk with on calls in three adjectives.
- What do you enjoy about your job? What do you dislike?
- What do you think would make your job more rewarding?
- What do you feel you struggle with the most in your role?
- Do you feel valued? Do you feel your ideas and hard work are appreciated?
- If you could change one thing that would make the company more successful, what would it be?

Questions to Ask: [Managers]

- Customer complaints have gone up 30% in the past year. Why do you believe that is?
- Do you believe that you receive adequate training on new products? Do operators? Please explain.
- How do you handle customer complaints about operators?
- What is the current protocol for remediating operators with inadequate product knowledge?
- From your perspective, what is the general attitude or mood of operators toward their job?
- Is there anything that keeps you from doing your best at your job? Any roadblocks?
- If you could change one thing that would make the company more successful, what would it be?
- If money and time were no issue, what would you need to make this call center the best it could be? (Encourage them to think big and out of the box).
- What do you think about the actual phone system? Were you in on the purchase decision and if so why did you choose this one?
- Do you think the phone system is inhibiting or helping your operators?
- Do you feel the operators are proficient at their job? If not what training may help them?

Questions to Ask: [Sheena Perez]

- Customer complaints have gone up 30% in the past year. Why do you believe that is?
- How did you (or someone else) determine appropriate new product training for operators?
- What parts of the training process do you think are successful as they stand, and what areas do you think need improvement?
- If money were not an issue, what changes, if any, would you make to the training process?

Roadblocks & Dependencies

- There could be concerns with employees being honest. They may be concerned that they will be punished for being honest.
- Employees may not have any idea why there are problems. They may not understand why there is a problem, possibly placing blame on the customer.
- Sheena may feel like her training material is being attacked and become defensive.

Strategies to Mitigate Risks

- We must reinforce that these interviews are private and specific identities will not be revealed. To address this, we will also provide a survey option for those who wish to remain anonymous but still provide feedback via SurveyMonkey instead.
- We must show the customer response data to ensure that employees realize there is an issue. We could show targets and how negative responses translate to a loss of business.
- We should applaud Sheena for the current success, but explain to her that there may be other ways to create training. We could also determine (through interviews) that there are outside factors that determine the creation of training material. Let her know that we are not here to attack anyone. As our questions note, if training materials and methods were indeed not up to her, we will inquire

about what areas she thinks the training could improve, and what she would do differently if given the opportunity.