Project Gap Analysis Strategy
for Team #3

November 1, 2015

Project Description

Instructional Design Solutions has been hired by PJ Enterprises to develop a training that is to be completed by telephone operators and supervisory staff prior to an upcoming catalog mailing. This training will replace a previous face-to-face training program, which was delivered by the individuals who will serve as subject matter experts for this project. A $400,000 budget has been set for the project, with an end goal of increasing catalog sales by $3,000,000. This gap analysis strategy will explore the ways in which our team would plan and prepare for the front-end analysis phase of the ID project. The goals of this analysis include:

- Exploring and anticipating potential roadblocks to success in development of the ID project

- Exploring and anticipating potential organizational roadblocks

- Gathering and analyzing quantitative and qualitative information that will inform the ID development and design processes

- Building rapport with SMEs

- Determining feasibility to ensure that training is appropriate and aligns with organizational goals

Information Needed

We need quantitative and qualitative information from PJE administrators to determine the root causes of the performance issue. At present, we have a good idea of what is happening, in terms of turnover, customer dissatisfaction, etc., but no firm grasp of why. While instruction may be an appropriate step forward for PJE, it is the role of Instructional Design Solutions to ensure that our instruction will meet PJE's anticipated and unanticipated needs. It seems that PJE is most interested in making a causal relationship between training and increased sales goals, without determining if that cause-effect relationship can be achieved by simply training on catalog products. Training may need to include basic customer service skills and information on internal processes, contingent upon the results of our research.

Team Strategy

Our research methods will include quantitative and qualitative analysis, interviews, observations, mystery shopping, and surveys.

Analysis Plan

	Research Method	Target Audience	Information You Hope to Gain	Team Member Responsible
1.	Observation	Telephone Operators	Efficiency, what is using their time, job processes	Bo Yang
2.	Mystery Shop	Telephone Operators & Customer Service Reps	Customer service strategies, telephone etiquette, and knowledge of products and service	Cassandra Dority
3.	Staff Surveys	Employees & Supervisors (past & present)	Employee insight into culture and learning, attitude towards work, concerns contributing to poor performance and dissatisfaction, and methods of training and supervision used	Mathew Oaldon & Cassandra Dority & Kimberly Myers
4.	Interviews & Review of current training materials with SMEs.	Human Resource Managers, the Project Sponsor, & the Subject Matter Expert (SME)	Management insight into processes and systems used for hiring and training to meet company goals, the goals and vision of the project, what problems we are trying to solve, and to understand the current training methodology and ascertain what aspect of it has been effective.	Matthew Oaldon & Kimberly Myers
5.	Customer satisfaction data analysis	Customers	Insight into customer issue trends and potential service gaps	Kimberly Myers

Activity #1 – Observation

Details of Activity/Method

Two types of observation:

1. Watch telephone operators on all three shifts, on different days, unannounced, to view them in their work environment. Looking for work efficiency such as where they have to go for information, what distracts them, and what is most of their time spent doing. Also observation of the processes they use to complete their jobs.

2. Auditory review of recorded telephone operator calls. A bank of calls over several shifts will be recorded. These will be listened to at random in order to review the telephone operators' responses to customer inquiries. The calls will be reviewed until at least 10 per shift are noted that can be used qualitatively.

What to Observe:

Basic skills – whether they have telephone operation basic skills, whether they know how to use the computer to enter data or process information

Typing skills – how fast they can input the customer information for purchasing

Waiting time – how soon the operator answers the ringing phone

Communication skills – how many times they ask for repetition to clarify the requests; whether they are polite to the customer; how they handle complaints

Promote company products– whether they are familiar with the company products, saving plans, and promotions; how fast they can sort out the information as need

Deal with special billing request – whether they are familiar with the billing process; who they refer to if they couldn't handle the issue; whether they could quickly transfer the call to the appropriate person;

Working environment – whether there is something that distracts or prohibits them from completing the duties; whether there is a break and how long the break is; whether there is supervisor on site and what the supervisor does; whether the equipment is up-to-date and user-friendly for TOs processing the order

What to Review:

The telephone etiquette – whether the tone is friendly and welcoming; whether the conversation is relevant and polite

Responses – how soon they respond to the questions; whether the questions are answered correctly; how long it takes them to sort out the information. How long the holding time is

Transfer – waiting time; how many times it transferred; what questions usually were transferred

Activity #2 - Mystery Shop

Details of Activity/Method

We would create a scenario of both a complaint and an order based on the currently used catalog. There would be four different items used with the same type of concern and purchase desire. These would be called in on four different days across all three shifts to complete the survey sample assessment.

Questions to Ask

- Did the employee answer the phone within 2-3 rings?
- If you were in the cue, how long before you spoke to a person?
- Did the employee who answered thank you for calling?
- Did the employee answer in a friendly voice?
- Did the employee supply his/her name and name of company?
- Did the employee attempt to solve your question or concern before transferring you to a different person?
- If you were placed on hold, were you asked to hold?
- When the person you were transferred to answered your call, were you thanked for holding?
- Did the employee ask questions to determine your needs?
- Did the employee respond with information relevant to your needs?
- How long did it take for the employee to respond with the information that you needed?
- Did the employee present as knowledgeable about the catalog products?
- Did the call end with you feeling positive about the purchase or resolution?

Activity #3 – Surveys

Details of Activity/Method

Our team will conduct surveys for both current and former operators and supervisors. Current employees and supervisors will be given a confidential survey to complete. No less than a 50% response rate will be accepted.

We will also survey former operators and supervisors who voluntarily terminated within the last 6 months. We will collect data from a diverse group of at least 10.

Questions to Ask

Current Employees & Supervisors

Call-center Operators Survey (See attached survey form)

1. What is your gender?
2. What is your age?
3. What is your education level?
4. What is your marital status?
5. What is your race?
6. Are you a full-time or part-time employee?
7. What shift do you normally work?
8. How long have you worked for PJ Enterprises?
9. Have you worked in a call-center before? If so, for how long?
10. Did you have experience with the equipment that you use before you were hired?
11. How satisfied are you with your job (0 = not satisfied and 4 = very satisfied)?
12. If you could change one aspect of your job which would it be?
13. How would you rate the quality of your breaks?
14. Which activity do you spend the majority of your time doing when interacting with customers?
15. How often do you transfer calls to a customer service supervisor?
16. Do you deal with matters that you have not been trained? If yes, how often?
17. How often do you meet your targets/goals for a given week?
18. How would you rate the quality of the training you have received (0 = Poor and 4 = Excellent)?
19. How useful is the training you receive (0 = not useful and 4 = very useful)?
20. What aspect of the training do you like most?
21. How likely are you to attend training sessions in the future?
22. Do you attend the monthly meeting regularly? Why or why not?
23. What type of incentives, beyond catalog discounts, would you suggest?
24. How many times have you been absent from work in the past 6 months?
25. How would you rate your health since you started working at PJ Enterprises?
26. How would you rate your sleep quality since you started working at PJ Enterprises?
27. How stressful would you rate the work environment at PJ Enterprises (0 = no stress and 4 = very stressful)?

Call-center Supervisor Survey (See attached survey form)

1. What is your gender?
2. What is your age?

3. What is your education level?

4. What is your marital status?

5. What is your race?

6. Are you a full-time or part-time employee?

7. What shift do you normally work?

8. How long have you worked for PJ Enterprises?

9. How satisfied are you with your job (0 = not satisfied and 4 = very satisfied)?

10. If you could change one aspect of your job which would it be?

11. How many customer complaints do you field on your shift on average?

12. Which activity do you find the most difficult?

13. Do you schedule employee's shifts as a supervisor? If yes, how would you rate your ability to schedule shifts (0 = Poor and 4 = Excellent)?

14. Do you deal with matters that you have not been trained on? If yes, how often? How would you rate the quality of the training you have received (0 = Poor and 4 = Excellent)?

15. How useful is the training you receive (0 = not useful and 4 = very useful)?

16. What aspect of the training do you like most?

17. How many times have you been absent from work in the past 6 months?

18. How would you rate your health since you started working at PJ Enterprises?

19. How would you rate your sleep quality since you started working at PJ Enterprises?

20. How stressful would you rate the work environment at PJ Enterprises (0 = no stress and 4 = very stressful)?

Former Employees & Supervisors

1. How did the job match your expectations?

2. Did you have the tools and resources to effectively do your job? If no, can you give examples?

3. Did anything specific trigger your decision to leave? If yes, what was it?

4. What would you change about the job?

5. Did any organization policies or procedures (or any other obstacles) make your job more difficult?

6. Can you be specific in relation to the policies and procedures and give any suggestions to improve them?

7. Did you have clear goals and know what was expected of you in your job? If no, can you give examples?

8. Did you receive enough training to do your job effectively? If no, what would you suggest?

9. Did you receive adequate support to do your job? If no, can you give examples?

10. Did you share your concerns with anyone in the company prior to deciding to leave? What was the response?

Activity #4 – Interviews

Details of Activity/Method

Our team will interview three groups within PJ Enterprises—human resource managers, the project sponsor, and subject matter experts.

Our team will first interview the Human Resources Manager to learn more about the hiring process, employee incentives, and performance review process.

Our team will then interview the project sponsor to determine the goals and vision of the project, to clearly define its scope, to establish timelines, and to set expectations for success.

A member of our team will also schedule and conduct an interview with each of the current PJ Enterprises trainers, Judie Thompson and Sheena Perez to understand the current training methodology and ascertain what aspect of it has been effective.

The team member will conduct real-time interviews face-to-face, over video conference, or via phone with these managers as part of a comprehensive front-end analysis.

Questions to Ask

Human Resources

1. Do you have job descriptions for operators and supervisors? Can we see them?
2. What competencies have been identified for successful job performance for operators/supervisors?
3. What does the ideal operator/supervisor look like to you? Could we use this and competency or job descriptions to establish a norm for collecting qualitative data?
4. Do you require that operators have experience in call centers or with certain equipment before they are hired?
5. What are your short-term and long-term goals for recruitment?
6. Do you measure the knowledge, skills, abilities and behaviors of operators/supervisors? If so, how?
7. How have you measured the success of your recruiting processes?
8. Have you made adjustments in your hiring processes because of the high turn-over rates? If so, can you tell us more about what you adjusted and why (metric driven)?
9. How would you describe the culture of PJ Enterprises?
10. What resources are available for you to deal with organizational or company culture changes?
11. Are there incentives for employee attending the meetings or training? If yes, what are they?
12. What incentives are available to operators/supervisors to perform better?
13. How are you measuring the effectiveness of these incentives?
14. Do you have a process for onboarding? If so, how effective has the onboarding been (training)?
15. What processes are in place for conducting performance reviews?
16. What are your key performance indicators for operators and supervisors?
17. What systems for operations have been established to help employees perform?
18. How would you rate the overall operational effectiveness of the business?
19. Some new HR policies were introduced to the staff. Would you mind sharing with us?
20. Currently, does PJ Enterprises have enough operators and supervisors to be adequately staffed on all shifts? If so, why do you think employees are not attending meetings?
21. Are there any other reasons why employees might not attend meetings?

Project Sponsor

1. What are the business needs this project is intended to address?
2. Can you explain how this project fits in with the organization's overall business strategy?
3. What is the most important issue you want improved?
4. What is your vision for this project (look and feel)?
5. Are there features that are must haves?
6. What is your intended outcome or define success?
7. What kind of tangible results would you like to see?
8. What would you like to see measured?
9. What are your specific expectations for this project?
10. What resources can you guarantee for us (people, data/metrics, etc.)?
11. When would you like to have the project finished?
12. What is driving the deadline?

Subject Matter Experts

1. What are your thoughts about the face-to-face training you have put together in the past? What do we need to know or consider, based on your experience with training this group? (This question is primarily intended to be a rapport-building question).
2. Tell me about the process for putting together the face-to-face training?
   - What were the objectives?
   - How did you decide what to include and leave out?
   - How did employees respond?
3. What does it look like in the training room? Do you know your trainees well?
4. Do you have any assessments to follow up with the training? If yes, what is it?
5. What did you like best about the training?
   - What are the three biggest strengths of the training?
   - What are the three biggest opportunities for improvement in the training?
6. What do you see as the biggest obstacles to the success of the training?
7. Do you have training handouts? Could you share them with us?
8. Do you think the current product guide is efficient? What was included in the product guide? Could we see it?
9. What are the demographics of your employees?

Activity #5 - Data review

Details of Activity/Method

Review of customer satisfaction surveys

Questions to Ask

1. Review content of customer surveys
2. Review process for rolling out and collecting data
3. Review the quantitative results of customer surveys
4. Review/code qualitative results of customers surveys
5. Look for patterns and trends in the data that provide evidence for a viable and appropriate performance solution to PJ Enterprises primary issues. Look for ways to incorporate the data into the current project and make recommendations to management.

Roadblocks & Dependencies

Roadblocks / Dependencies	Mitigation Strategies
Uncooperative SME	Relationship building, making them comfortable that we are here to help, make their input and experience feel valuable.
Technological difficulties	We are looking for both qualitative and quantitative data. For example, measure the amount of calls lost. To do so, we would randomly select transcripts from all shifts with a goal of 10 per shift. If we are unable to get a minimum of 10 calls in a shift, the deadline would be pushed back until 10 transcripts are received.
Disgruntled employees or culture of the company	Talk to management about adding incentives to encourage cooperation. Also highlight this in the overall assessment.
Observations/Cooperation	Encourage employees to be genuine and go about their jobs as normal. Observer should be careful not to be a distraction.
Completed surveys	Employees will be given enough time to complete the surveys during the normal work hours. Team must receive at least 50% of surveys back to consider data useable.