

# Needs assessment/analysis

	Needs assessment – Is there a gap?	Needs/influence analysis – What is the root cause of the gap? Can training solve it?	Business analysis – What is the effect of the gap on the business?
<p><b>For requester</b></p>	<ul style="list-style-type: none"> <li>• Why are you requesting this training? <b>As part of onboarding, we want to ensure new employees can make appropriate customer service choices</b></li> <li>• What specific skills, attitudes, or behaviors would you like participants to walk away with? <b>The confidence to handle tough customer situations, the ability to diffuse situations while maintaining a respectful relationship with the customer, the ability to remain composed and focused before, during, after difficult customer encounters</b></li> <li>• What gap are you noticing? <b>Most new employees have to utilize the manager for customer issues, some employees get reactive with customers, some employees have a hard time re-focusing after encounters</b></li> <li>• What might result if we don't conduct the training? <b>Lose business and revenue as customers go to competitors, employee churn</b></li> <li>• Who is displaying the gap? <b>80% of new hires</b></li> <li>• Why is there a gap? <b>No formal training on customer service</b></li> </ul>	<ul style="list-style-type: none"> <li>• What does an “expert” in this area do that others don't? To what do you attribute this gap? <b>Experts stay calm and focused on the wake of any customer issue, listen actively and always try to solve the problem so the customer ends up happy, experts take ownership to problem solve</b></li> <li><b>The more experienced employees (those that have had CS jobs before or have been in the company longer) have a better ability at solving CS issues</b></li> <li>• Are there any other things going on in the organization that could be contributing to the gap you've noticed? <b>Lack of hands-on CS training and strategies to deal with stressful experiences, a focus on speed and drink knowledge</b></li> <li>• What previous attempts have been made to address the issue? What was the outcome? <b>Mandatory trainings through videos and lectures - doesn't seem to have created a lasting impact</b></li> </ul>	<ul style="list-style-type: none"> <li>• What goals is the organization trying to achieve? <b>To be the best coffee company in the world</b> <b>To increase our revenue</b> <b>To have 100% customer satisfaction</b></li> <li>• How does this training support your business priorities? <b>Directly proportional to our goals - better CS training = increased ability to handle CS on job = increased CS metrics = more revenue</b></li> <li>• How does this training support your organization mission/vision/values? <b>We are here because of our customers and want to give them the best possible experience, We value our employees and their mental health on the job</b></li> <li>• How is this training rated on your list of priorities? <b>Top 3</b></li> <li>• What metrics should improve with this training? <b>Customer survey metrics should improve</b></li> </ul>

<p><b>For members of target audience</b></p>	<ul style="list-style-type: none"> <li>• Are you doing this behavior? <b>Trying to – get flustered, don't know how to respond</b></li> <li>• Do you know how to do this behavior? <b>Not really – you don't learn this in school</b></li> </ul>	<ul style="list-style-type: none"> <li>• What might be stopping you from doing it? <b>Lack of training, first job with CS, different type of customer base (coffee is personal)</b></li> <li>• Are there consequences for doing or not doing this behavior? <b>Yes – customers complain to managers, and I could get in trouble – my hours reduced</b></li> <li>• How are you evaluated? What would you need to do more of to get a perfect evaluation? <b>CS is part of the scale we are assessed on by the manager, lots of complaints about us can lead to consequences</b></li> <li>• How motivated are you to use this knowledge/skill? Why? <b>Desire to be a better employee, useful life skill</b></li> </ul>	<ul style="list-style-type: none"> <li>• What is the impact of your work on the customer/organization? <b>I am a representative of the company for the customer, directly work with the customer and how they experience the business</b></li> <li>• What is the result of not doing this behavior? How does it affect your performance, career, other? <b>I feel like I'm not doing my job correctly, get frustrated, have to ask manager all the time, could get hours reduced, felt like quitting because I'm stressed all the time</b></li> </ul>
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**Training is needed – the most important gaps**

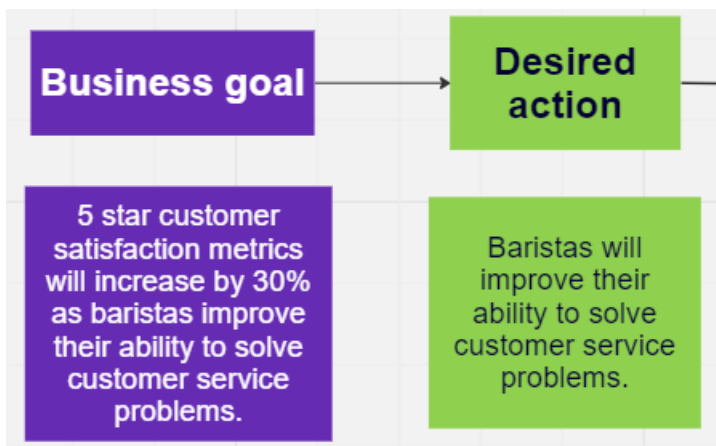
- 1. Skill - Making appropriate choices that diffuse difficult situations while maintaining the customer relationship in regard to CS**
- 2. Skill – emotional regulation and self-management**

# Learner analysis

<p><i>After we know if training is the answer:</i></p>	<p><b>Performer / learner analysis – Everything I can find out about audience</b></p>	<p><b>Performance / task analysis – Everything I can find out about the job / task required</b></p>
<p><b>For requester</b></p>	<ul style="list-style-type: none"> <li>• Who are our learners?  <b>20% 18–20-year-olds</b>  <b>60% 20–30-year-olds</b>  <b>24% working at business &lt; 1 year</b>  <b>33% working at business 1-2 years</b></li> <li>• Previous experience in this area?  <b>Some have had other CS jobs; most people have interacted with other people at some point</b></li> <li>• Previous training on this, or related, topic? How long ago? How did it go?  <b>Video training during on-boarding, some mandatory training a year ago, metrics still decreased</b></li> <li>• Receptivity to training in general?            Almost all want training on this</li> <li>• How receptive/motivated might they be to learn this topic specifically?  <b>Highly motivated</b></li> <li>• What resistance from learners should I expect?  <b>Training to some = boring</b></li> <li>• Do they have the pre-requisite skills needed?  <b>Connect CS with their job and the overall success of the business</b></li> </ul>	<ul style="list-style-type: none"> <li>• What performance is needed for the organization to reach its goals?  <b>Increase customer satisfaction metrics</b></li> <li>• What tasks must be completed and how?  <b>Employees must take ownership of CS problem-solving and ensure a positive relationship with customers is always their top priority</b></li> <li>• What KSAs (knowledge, skills, attitudes) do learners need to display?  <b>Knowledge = general customer complaints, system, or checklist to follow, self-management strategies</b>   <b>Skills = system or checklist to follow in CS decision making, self-management system</b>   <b>Attitudes = always client-driven, positive, respectful, ok to feel upset or disrespected but not take it out on customer</b></li> <li>• To what degree do they need to display these skills?  <b>100% of the time</b></li> <li>• How often will the employee perform these skills after training?  <b>Every shift</b></li> <li>• How will the employee be evaluated in this area?  <b>Through evaluation by manager, CS metrics</b></li> <li>• What supports for them doing this work are there back on-the-job?  <b>Management is on board with training, post job aids to help them remember the systems</b></li> </ul>

<p><b>For members of target audience (stars, under performers, and average performers)</b></p>	<ul style="list-style-type: none"> <li>• What amount of autonomy do you have at work?</li> <li>• How high-pressured is your job?</li> <li>• How happy are you with your job?</li> <li>• Are rules / policies / instructions clear?</li> <li>• How are working conditions / compensation?</li> <li>• What support will you need after training to ensure the skills transfer?</li> </ul> <p><b>CS refreshers, classroom type of training using scripts</b></p> <ul style="list-style-type: none"> <li>• What will get in the way of your performing this new behavior/task on the-job?</li> </ul> <p><b>Some customers are just plain difficult and rude</b></p>	<ul style="list-style-type: none"> <li>• What are your roles and responsibilities?</li> </ul> <p><b>Take orders, ring up customers, make drinks</b></p> <ul style="list-style-type: none"> <li>• What are the most important reasons for you to learn this skill / get this training?</li> </ul> <p>Help me feel more confident in stressful situations, not getting reactive</p> <ul style="list-style-type: none"> <li>• What work situations are hardest for you to handle?</li> </ul> <p><b>Customers who yell at me or get very disrespectful – treat me like I am nothing or not important</b></p> <ul style="list-style-type: none"> <li>• What are we forgetting?</li> </ul>
<p><b>Additional sources</b></p>	<ul style="list-style-type: none"> <li>• Performance review data</li> <li>• Union grievances</li> <li>• HR complaints</li> </ul>	<ul style="list-style-type: none"> <li>• Job descriptions</li> <li>• Job handbooks</li> <li>• Orientation materials</li> <li>• On-the-job observations</li> <li>• Organizational expectations / policies</li> </ul>

# Training solution



- **Scenario-based e-learning program** uses tech (younger learners), self-regulated learning, experiential -- directly connects to experiences they will face on the job and can be immediately used on the job, flexible learning environments (at home, during break), can be gamified, can be used with additional F2F trainings