

# Needs Analysis, Customer Service Representative Onboarding

Slide deck walkthrough for Instructional Design Portfolio

## Introduction

This document walks my instructional design portfolio viewers through a slide deck which presents needs analysis findings with project stakeholders at a manufacturing corporation that produces and distributes dairy products to manufacturers across California. **Any process similar in nature to a previous manufacturer I worked for is redacted.**

This needs analysis is for medium or long-term training projects. For short-term training projects, I present training proposals, an example of is also featured on my portfolio.

Throughout this document I will:

- 1) List contextual details pertaining to
- 2) the slide referenced on the following page.



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## Collaborative Process

It is worth noting that while communicating my understanding of and strategy addressing training need, throughout the presentation I offer project stakeholders the opportunity to weigh in with context or suggestions useful for improving the overall project for the learners, business, and involved contributors.

## Learning Opportunity

### Purpose, Needs Analysis

- Explore business-end training components before project start
- Focus learning goals based on stakeholder feedback
- Gain buy-in to help cut development time

### Existing Training Documentation

- Job shadow videos
- Call with promoted staff member who previously held sunsetting position

- Fifteen pages of SOPs for transitioning position, annotated with consideration for growth of role

## Context, Needs Analysis

Customer Service department seeks training for newly created position. Business is quickly growing, causing an overhaul of previous position including process, process ownership, and role scope.

Based on Operations desire to deliver focused logistical support and Customer Service's goal to increase customer experience, leadership wants dedicated staff for each area. However, dedicated staff is also needed for addressing specific business instances requiring communication with stakeholders regarding both deployment logistics and customer receiving.

# Training Opportunity

- **Need: Customer Associate II Onboarding**

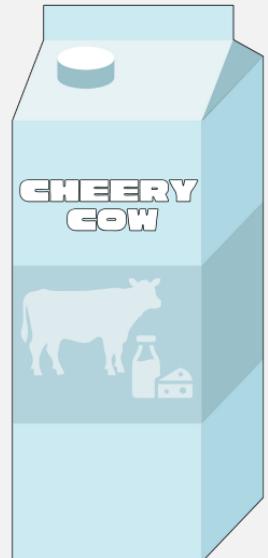
*Goal: accustom new CA IIs to a new, fast paced role*

- New position created due to company growth
- Hybrid of Customer Service and Logistics
- 80% external hires, 20% internal lateral hires

- **Why: Support Cheery Cow's growth targets**

*Increased customer service needs, territory expansion*

- New freight companies, new customers
- New CS workflow
  - On-the-spot response for transport, receiving



## Learner Profile

A learner profile further elaborates needs best met through comprehensive onboarding, including training on technical and contextual process.

### Learning Audience

Majority of new hires for role are recent college graduates. How does this shape learning perspective?

- first work experience post-graduation
- learning curve when handling complex supply chain process

### Technical Learning Considerations

Company uses Software as a Service (SaaS) to help improve internal and external service levels

- **new hires** must learn software application combined with cross-functional collaboration for troubleshooting complex instances pertaining to manufacturing and customer order process

Workflow instances affecting successful production and fulfillment do not follow uniform troubleshooting route.

- Comprehensive understanding of functional supply chain areas: manufacturing process, [REDACTED] and additional business knowledge necessary to resolve opportunities while minimizing potential losses.

Internal change management dynamics

- **current laterally promoted employees** must learn a new process flow, unlike previous ways of work execution

### Training Needs Addressed

- Training facilitators deliver interactive instructor-led training on contextual business information of cross-functional supply chain areas, including software simulations, [REDACTED] and in-class group eLearning activities. Learning will be scaffolded by business area categories and introductory and intermediate/advanced levels of knowledge
- New hires to role pair with unit mentors during onboarding period for production-based on-the-job training, interactive dialogue on best practices based on business instance

# Learner Profile



- **Learning Audience:** New hires, current employees – less than two years of service  
*impressionable, learning curve, cheery cow cross-functional culture*
  - recent college graduates
  - new to company software and applications
  - internal team members – accustomed to previous workflow
- **Learner training needs**
  - 1:1 on-the-job technical mentorship
  - Demonstrated knowledge, cursory skills, role-execution
  - Introductory coaching orientation, troubleshooting production
  - “Bigger Picture” critical thinking

# Instructional Modes

Here, I explain how the learner takes in training information and what comprises each type of instruction. The onboarding utilizes different means for audience to interact with and apply content.

## Instructor-Led Training (ILT):

In-person and/or virtual onboarding courses led by a facilitator. I am proposing onboarding participants attend these sessions prior to on-the-job training with their unit mentor to increase business context understanding and minimize explanation of cross-functional supply chain covered during this time.

Course sessions cover contextual information such as each supply chain functional department structure and process relevant to successful role execution, manufacturing and production floor process for troubleshooting business instances, and additional related information. Information intake is meant to be active in nature, with plenty of activities where learners pair with other onboarding participants to work on simulations, case studies, and microlearning completed during class time.

## Micro e-Learning

Interactive learning modules completed during ILT to reinforce role process knowledge. These are done in addition to any self-study role-related eLearning required by departments outside of onboarding program hours.

For example, one activity displays images of order status indicators shown on windows of the company transportation management platform (used for identifying status of order during manufacturing and deployment process). Onboarding attendees then had to match the image with the correct corresponding cross-functional troubleshooting actions needed for resolving or communicating business context to customers/partners.

## On-the-Job Technical Training

Onboarding participants benefit from solutioning production-based instances with an experienced training mentor in their unit. Whereas ILT instructors have business knowledge of cross-functional departments and process essential for successfully troubleshooting business instances and can lead simulations, unit training mentors will have access to the production-based platforms and provide guidance on real-time instances. Unit trainers also have additional knowledge specific to business regions or specific, specialized customer accounts.

## Role Certification

Scaffolded onboarding loans to a formative role certification process. The proposed onboarding schedule has attendees learning business context as related to enterprise platforms (i.e. Electronic Business Platform 100), which includes software simulations and corresponding cross-functional troubleshooting. Prior to advancing to the next level of instruction, attendees complete an assessment with several comprehensive questions related to topics covered during that part of the onboarding program.

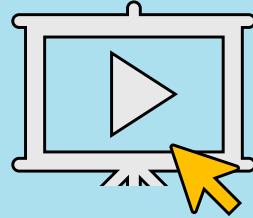
Units have access to staff results if needing confirmation for management reasons.

Eventually if refreshing or recertification on an area of business is required due to a change in process the certification exam already exists and instructional designers can work with subject matter experts to scale previous assessments to current process.

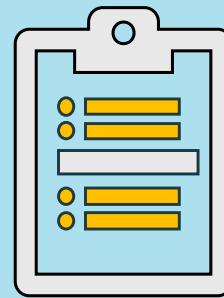
# Methods of Delivery



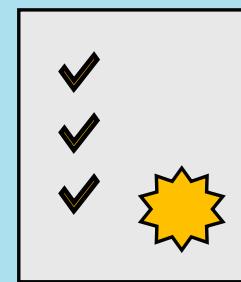
Instructor-Led  
Training



Micro  
e-Learning



Department Technical  
On-the-Job Training



Role  
Certification

## Learning Timeline

Based on identified department metrics measured by CRM service incident resolution (SLA) and daily tasks required for the role, this learning timeline identifies performance expectations for onboarding participants during transition period (zero to three months) and beyond.

### Skill Progression, three to six months

During their transition period, new hires may need to escalate complex instances. Now, this shifts with an increase of successful process execution (90%) based on SLAs and value-added service with customer accounts such as analysis of order patterns and suggesting deployment routes and order schedules based on optimal profit for both retailers and the company

At this time, SLAs for specific processes that fall below 80% could be revisited through recertification on that area to further identify knowledge gaps, and if necessary, additional training or unit mentorship could help increase performance

### Skill Progression, six to nine months

After nine months, performance expectations for accuracy and value-added customer service increase. Based on department need, recertification and additional mentoring could address remaining performance opportunities.

# Learning Timeline

## Months 0-3

- Workflow orientation, application
- 80% successful process opportunity resolution
- 80% SLA attainment

## Months 3-6

- 90% successful process opportunity resolution
- 20% daily work value-add service
- Review and recertify SLA areas below 80%

## Months 6-9

- 95% successful process opportunity resolution
- 25% daily work value-add service
- Review and recertify SLA areas below 90%

## Training Collaboration, Project Roles

During this section of the presentation, I once again invite project stakeholders to weigh in and shape project roles and responsibilities for the duration of the project. This dialogue is essential to setting expectations prior to project kick-off and greatly benefits the continued momentum of a project.

This is my general approach to learning project roles which I can adjust based on department or business needs.

### Project Sponsor

Typically, this is a Senior Manager or leader within the department. The project and its learning and business outcomes directly affect goals they set for KPIs. Project Sponsor acts as final sign-off for content vetting and has final say in resolving alignment on project objectives, content, and deliverables. The project sponsor can also help with data or metrics if needed to measure project success or help reinforce learning content.

### Project Owner

Project owner is the department staff who requested the training project.



Can Project Sponsor and Project Owner be the same person? Yes. In some instances, they can be the same individual.

### Primary Designer

Primary Designer is responsible for mapping and designing learning content for meeting learning objectives. He/She will build curriculum, assessments, activities, and other opportunities that grow skills in identified task and process areas. The content the primary designer presents to learners is information new to the audience, and design is meant to build foundational skills in a manner that staff seasoned in the content may overlook.

### Subject Matter Experts

Subject Matter Experts are experienced staff members who can provide insight on granular questions about process content for the Primary Designer. They can also provide content itself for the designer such as screen grabs or videos to help streamline the design and development process of the project.

### Design/Facilitation team

There may be other designers on the team to help support content development. In this example, facilitators help deliver instructional content during classroom training.

Facilitators can also help build training scripts for decks and collect granular content from Subject Matter Experts.

Corresponding slide referenced on following page

# Project Roles



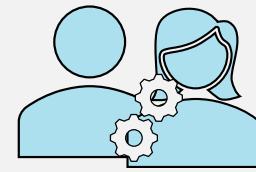
Project  
Sponsor



Project  
Owner



Primary  
Designer



Subject Matter  
Experts (SMEs)



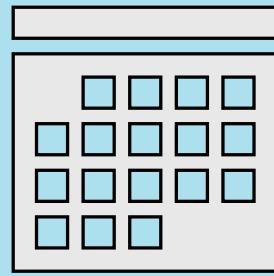
Design/  
Facilitation Team

## Training Collaboration, Project Team Expectations

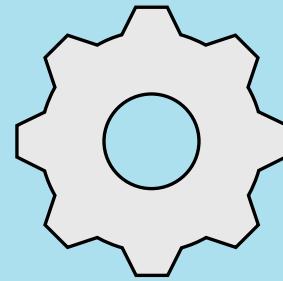
This is where we discuss standing project meeting cadence, technical content support given by SMEs, the process for content vetting if needing alignment, and content final sign-off.

This is also the time where I end the meeting with next steps such as providing learning objectives for learning modules, meeting with SMES to gather granular content, and setting the date for the next team meeting.

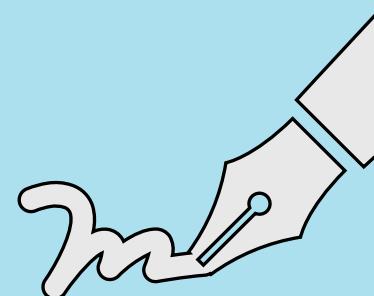
# Project Team expectations



Standing project  
meetings



Functional  
technical support



Content vetting  
and **final sign-  
off**

