

Needs Analysis, Customer Service Representative Onboarding

Slide deck walkthrough

Context

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.

Existing Training Documentation

- Job shadow videos
- Call with promoted staff member who previously held sunsetted position
- Fifteen pages of SOPs for transitioning position, annotated with consideration for growth of role

Purpose

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

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



After completing a task analysis* of the main duties for the new role as provided by leadership, the need to step away from a “one size fits all” order instance approach was the most important takeaway for new and transitioning team members to fill role.

***Note to reviewers:** detailed task analysis depends entirely on company process. That said, any task analysis I complete for a full needs analysis involves informational interviews for context, followed by review of existing training documentation, and a job shadow for a chance to observe workflow nuances.

Role-function Business Opportunities

- (redacted for business) freight companies covering regional service routes
 - freight for company orders determined by (redacted for business process) freight company service dynamic
- over 500 different customer store locations spread across 5 regional areas
 - five service platforms related to customer and freight response
- instant response to logistical challenges compromising quality of dairy orders

A role-specific onboarding directly addresses the training opportunity. Post-training, learner behavior supports the department end-goal.

Learner Profile

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

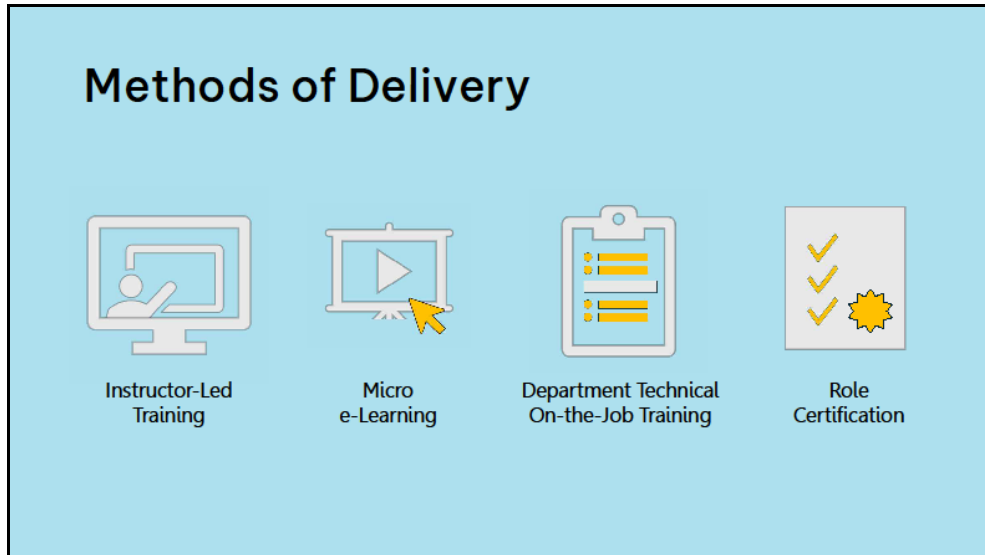


A learner profile further elaborates needs best met through comprehensive onboarding, including training on technical and contextual process.

- the majority filling the role are recent college graduates
 - first work experience post-graduation
 - learning curve when handling complex supply chain process

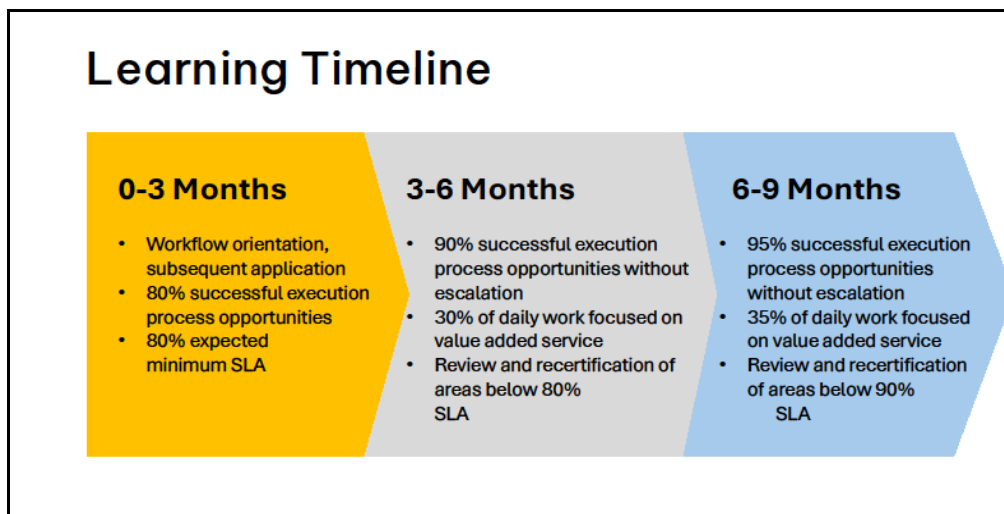
- company uses Software as a Service (SaaS) to help improve internal and external service levels
 - new hires must learn software application for complex instances happening during manufacturing and customer order process
 - smaller group filling the role are current employees who need to learn a new process flow, unlike previous way of doing things
- element of change management to be addressed with training methods

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.

Learning Timeline



Paired with the project's learning objectives, a learning timeline provides targets and expectations for the effectiveness of the training project. It also invites team members to revisit process areas requiring additional training to successfully meet department targets.