Gap Analysis Strategy

Project Description

PJ enterprises has contracted START to provide a learning solution that will assist the organization with meeting its goals of (a) maintaining or exceeding projected targets, (b) maintaining profitability, (c) improving customer service scores by 10%, and (d) increasing the quality of work environment with staff development and recognition. In order to best meet the needs of the organization; START will conduct the following gap analysis to obtain more information before the recommended solutions are determined.

Information Needed

In order to better understand the barriers to providing superior quality and service, START needs to gather additional information about the current state of operations at PJ Enterprises. During the gap analysis phase of the project, START will be investigating:

- Channels and quality of communication both within the organization and with external customers including:
    - Frequency and accuracy of information updates.
    - Receiving and addressing feedback.
- Environmental resources and tools including:
    - Information technology resources and support.
    - Physical equipment and facilities
- Established expectations and corresponding metrics.
- Typical employee performance capacity.
- Established performance incentives and consequences.
- Necessary skills and knowledge to perform successfully.

Team Strategy

START will employ the following strategies to conduct a performance analysis/training needs analysis at PJ Enterprises:

- Analysis of non-human resources
- Observations
- Survey
- Interviews
- Focus Group

The START team will work collaboratively to request data on:

- Production Timeline
- Call Volume/Shift Schedules
- Metrics Data

- Customer Service Data
- Sales Statistics
- Automated System Desktop Procedures/Screen Shots
- IT requests
- Graphic representation of incoming calls
- Training schedules/curriculum
- Work history/education level

START will arrange a site visit to observe the physical layout of the call center, employee collaboration, and the day-to-day operations first hand. Peak call volume statistics will be used to inform scheduling.

A survey will be used to determine employee satisfaction with their job, management, the work environment, and training. It will also allow employees to voice other felt needs and prospective solutions.

The project team will conduct a focus group with the customer service supervisors to discuss excellent job performance, call quality, perceived challenges, and suggestions for improvement.

START will conduct interviews with:

- Telephone Operators
- Customer Service Supervisors
- Catalog Director
- Merchandising Manager
- VP Sales
- Director Sales Support
- VP Information Systems
- Intranet Head Manager

Small groups of telephone operators will answer subsets of questions to respect time off the floor. Particular questions may be asked to multiple groups to gain input from multiple perspectives. The interview questions are designed to further the team's knowledge of sales call procedures, customer service protocols, workflows, training, the work environment and technology, staff motivation, human resource practice, and growth management.

Analysis Plan

START will assess PJ Enterprises using the following methods:

	Research Method	Target Audience	Information You Hope to Gain	Team Member Responsible
1.	Interviews 1:1	Telephone Operators Customer Service Supervisors Catalog Director Merchandising Manager VP Sales Director Sales Support VP Information Systems Intranet Head Manager	Current state and improvement needs of: ● Sales calls ● Customer service protocols and workflows ● Training and information support ● Work environment and technology ● Staff motivation and incentives ● Human resources practices ● Growth management	Teresa
2.	Focus Groups	Customer Service Supervisors	Qualities of star performers Call quality examples Reasons for referrals to CSS Perception of challenges for TOs Suggestions for tools or procedures that could improve metrics (# call/hour) Employee on-boarding.	Sarah

	Research Method	Target Audience	Information You Hope to Gain	Team Member Responsible
			Perceptions of causes for increase in employee complaints.	
3.	Survey	Employees	Determine employee satisfaction with: • Their job • Management • Their work environment • Training Identify any problems employees feel exist and how they might be resolved	Bob
4.	Documentation Review	Judie Thompson and Sheena Perez Customer Service Supervisors Bruce Bennett/Yun Sien Human Resources Jane Mackenzie/Mike Merrill	● Production Timeline ● Call Volume/Shift Schedules ● Metrics Data ● Customer Service Data ● Sales Statistics ● Automated System Desktop Procedures/Screen Shots ● IT requests ● Graphic representation of incoming calls ● Training schedules/curriculum ● Work history/education level	Tyler
5.	Observations	Telephone Operators	Typical performance	Amy

	Research Method	Target Audience	Information You Hope to Gain	Team Member Responsible
			capacity Frequency of key behaviors on a call Work activities outside of direct customer interactions Type and frequency of work disruptions	
6.	Observations	Facilities	Floor plans (collaboration opportunity) Traffic patterns Basic workspace ergonomics Light and noise levels	Amy

Activity 1 – Interviews of Staff and Management

Details of Activity/Method

START will interview JP Enterprise individuals in staff and management including Telephone Operators (TO), Customer Service Supervisors (CSS), Catalog Director, Merchandising Manager, and Senior Management (VP Sales, Director of Sales Support, VP of Information Systems, Intranet Head Manager).

Information gathering will be used to determine current state and improvement needs of: 1) catalog sales calls; 2) customer service protocol and workflows, 3) training and information support; 4) work environment and technology; 5) staff motivation and incentives; 6) human resources practices; and 7) managing growth.

TO interviews will last 15 minutes and consist of 10-12 questions in one or two categories (e.g. calls or customer service). Interviews will be conducted with a variety of individuals and groups. Each interview will consist of a line of questioning specific to the job assignment or role at PJ Enterprises, and over the course of a series of interviews, answers to all the questions below will be obtained.

Questions to Ask Telephone Operators

Catalog Sales Calls

- How are you trained to answer product questions? Do you feel you are given enough information?
- Please describe a typical sales call. How long do you spend on a typical call? What factors cause a long call?
- What aspects of your job do you find challenging?
- What do you feel causes backups in the queue? What causes a long call?
- What questions are you commonly asked?
- What questions are the most difficult to answer?
- What resources do you have available? Which do you find the most useful? Do you feel you need any additional resources for success?
- What strategies do you use to make sales?
- Why would you ask a caller to call back?
- Why would you transfer a call to a supervisor?
- Are 6 calls per hour a reasonable number? Why or why not?

Catalog Training And Information Support
- How much time elapses between your training and answering calls on those products on the floor? Do you get access to products you are selling?
- What does the current training look like?
- What topics are covered in the monthly employee meetings? What day/time are they held?
- How often do you receive training opportunities? What are the topics?
- In what mode are you reviewing the catalog (i.e., Web, PDF, Paper)?
- What do you do if you have a question about a product?
- Who would you ask if you needed additional information about a product?

Work Environment And Technology
- How long is your shift?
- Do you use the automated system? Does it work well for you? Is there anything you would like to see added or changed?
- What is the call volume at various times of the day and day of the week?

Staff Motivation and Incentives
- Are there advancement opportunities for you?
- Do you earn time off or sick leave?
- Do employees support one another on the floor? How so?
- How are work standards communicated?
- How does management communicate "new business" to you?
- Are there performance incentives? What are they?
- What aspects of your job do you find challenging?
- What communication tools are in place for management and staff?
- What strategies do you use to make sales?

Questions to Ask Customer Service Supervisors

Catalog Sales Calls
- Walk us through the chat flow for a call from start to finish.
- Are calls recorded? Do you have audio examples?

- Could we see the report indicating three calls are answered an hour rather than six?
- Do employees upsell/ask for referrals?
- Do TOs have difficulty with certain portions of the call?
- Do you have any reports indicating times with peak call volume?
- Which TOs answer the most calls per hour? What do you feel enables them to do so?
- What questions necessitate a call transfer from a TO to a CSS?

Customer Service
- *Do you have reports with customer service data?*
- *What customer service questions are asked?*
- *What steps have you taken to address complaints?*
- Why do you feel there has been an increase in customer service complaints?

Catalog Training And Information Support
- Do employees have the opportunity for ongoing professional development/training? How does this take place? If so, what topics are covered?
- How are new employees trained? Is there a curriculum in place?
- Do you get access to products you are selling?
- What does the current training look like?
- What do you do if you have a question about a product?
- What job aids or references are in place for you?
- What topics are covered at employee meetings?
- In what mode are you reviewing the catalog (i.e., Web, PDF, paper)?
- Whom would you ask if you needed additional information about a product?

Work Environment And Technology
- What are the strengths of the automated system? Are there any weaknesses?
- What are the shifts for covering the 24-hour period, and how many representatives are on the floor at a time?
- How long is your shift?

Staff Motivation and Incentives
- How are telephone operators held accountable?
- Do employees support one another on the floor? How so?
- Do you observe your employees on the floor? How often? What strengths do you observe? What weaknesses?
- Are there advancement opportunities for you?
- Do you earn time off or sick leave?
- How are work standards communicated?
- How does management communicate "new business" to you?
- Are there performance incentives? What are they?
- What aspects of your job do you find challenging?
- What communication tools are in place for management and staff?
- What strategies do you use to make sales and solve customer service problems?

Work Environment and Technology
- What are the strengths of the automated system? Are there any weaknesses?
- What are the shifts for covering the 24-hour period, and how many representatives are on the floor at a time?

Human Resources Practices
- What factors do you feel contribute to a high turnover rate?
- Who are your newest representatives? What is the sales difference and what are success behaviors?

Questions to Ask Management - Catalog Director, Merchandising Manager

Catalog Sales Calls
- How do the calls move from the queue to an assigned CSS?
- Is there a flowchart depicting customer call workflow?
- What is the duration for an average customer call?
- What is the first point of contact for the customer? Pre-recorded voice (press 1 for…) or direct contact with a human?

Customer Service
- What is the workflow for a CSS when faced with an unhappy customer?
- Exactly what questions are being asked in the customer service surveys?
- What questions necessitate a call transfer from a TO to a supervisor?

Catalog Training And Information Support
- Can you detail the production timeline and when product descriptions are available in comparison to the training dates?
- How much time elapses between hire and the employee answering calls on the floor?
- Any support in place for new hires other than CSS? Mentor/Team leads?
- What kind of exposure to product inventory do CSS's and TO's get other than catalog and written descriptions?
- In what mode are they reviewing the catalog (i.e. Web, PDF, Paper)?
- What does the current training look like?
- What topics are covered in the monthly employee meetings? What day/time are they held?
- Why do you think attendance is poor at staff meetings?
- What job aids or references are in place for the CSS's?
- What training and assessment is available to new hires (those who come on out of sync with the catalogue cycle)?
- When are product descriptions available in comparison to the training date?
- How do operators use available information? Use of product reference guides?
- When are product descriptions available in comparison to the training date?
- How long do representatives have from the training date before they are answering questions on new products on the floor?

Work Environment And Technology
- How often is the automated system updated?

- What are the working conditions for operators?
- What is the physical layout of the call center?
- How often is the automated system updated?

Staff Motivation and Incentives
- Are there advancement opportunities for your staff?
- Does your staff earn time off, sick leave?
- What's management's reasoning for not compensating staff meetings?
- Are TOs, CSSs and Warehouse staff involved in finding solutions to performance gaps?
- Do employees support one another on the floor? How so?
- Do you observe your employees on the floor? How often? What strengths do you observe? What weaknesses?
- How are phone system reports generated?
- What is the call volume at various times of the day? 2 p.m. versus 2 a.m.? Wed. versus Sat.?
- How are work standards communicated?
- How do you communicate "new business" to employees?
- What are the incentives for "error-free" performance? How are they communicated/awarded? Are they effective in your view?
- Are there sales incentives? What are they?
- What aspects of your job do you find challenging?
- What communication tools are in place for management and staff?
- What metrics are used to determine sales incentives?
- Which products are best sellers? Which are the most profitable?
- Do you know which representatives answer the most calls per hour? What do you feel enables them to do so?
- Who are your top sellers? Who are your newest representatives? What is the sales difference?

Human Resources Practices
- Are TO/CSS salaried or hourly? Do the hourly's clock in/clock out at start/end of day and breaks?
- Do the employees have the prerequisite skills and aptitude to fulfill the role?
- How do you find recruits?
- Does HR conduct exit interviews?
- What do you learn from exit interviews and employee satisfaction surveys?
- How many TO's must a CSS support? (More broadly, what does the "organizational chart" look like?)
- What are the management styles and training for supervisors?
- What are the protocols and processes for recruiting and hiring of TO's, CSS's and Warehouse staff?
- What do they hope to accomplish through revising performance evaluation process?
- What will the new HR performance evaluation look like?
- Has there been a recent local market-analysis for employee compensation conducted?
- Who on the management team is involved in new hires?
- Why are employees being terminated?

- In your view, why are people quitting?
- How many years of call center experience does the average telephone operator have?
- What is the level of education of the telephone operators and the customer service supervisors?
- Can you describe the technical proficiency of the average telephone operator and customer service supervisor?

Managing Growth
- Is the warehouse and call floor ready for the increase in volume?
- What is the capacity in terms of staff and space?
- Can your current staffing levels accommodate projected growth?

Questions to Ask Senior Management (VP Sales, Director of Sales Support, VP of Information Systems, Intranet Head Manager)

Catalog Sales Calls
- How do calls come into the queue and how are calls are assigned to telephone operators?
- Do you think technology could be affecting telephone operators' performance?
- How do the calls move from telephone operator to a CSS? What questions necessitate a call transfer from a telephone operator to a supervisor?
- What is the duration for an average customer call?
- What is the first point of contact for the customer? Pre-recorded voice (press 1 for…) or direct contact with a human?

Customer Service
- What is the workflow for a CSS when faced with an unhappy customer?
- Exactly what questions are being asked in the customer service surveys?

Catalog Training And Information Support
- How much time elapses between hire and the employee answering calls on the floor?
- Any support in place for new hires other than CSS? Mentor/Team leads?
- What kind of exposure to product inventory do CSS's and TO's get other than catalog and written descriptions?
- How long do representatives have from the training date before they are answering questions on new products on the floor?
- What is the current format of the product guide? (i.e. Web, PDF, Paper)
- What does the current training look like?
- What topics are covered in the monthly employee meetings? What day/time are they held?
- Why do you think attendance is poor at staff meetings?
- What job aids or references are in place?
- What training and assessment is available to new hires (those who come on out of sync with the catalogue cycle)?
- When are product descriptions available in comparison to the training date?

- How do operators use available information? Use of product reference guides?
- When are product descriptions available in comparison to the training date?

Work Environment And Technology
- How often is the automated system updated?
- What are the working conditions for operators?
- What is the physical layout of the call center?
- How often is the automated system updated?

Staff Motivation and Incentives
- Are there advancement opportunities for your staff?
- Does your staff earn time off, sick leave?
- Do your think any attendance/attitude issues stem from fact that meetings are not compensated?
- Are TO's, CSS's and Warehouse staff involved in finding solutions to performance gaps?
- Do employees support one another on the floor? How so?
- Do you observe your employees on the floor? How often? What strengths do you observe? What weaknesses?
- How are phone system reports generated?
- What is the call volume at various times of the week and during the day?
- How are work standards communicated?
- How do you communicate "new business" to employees?
- What are the incentives for "error-free" performance? How are they communicated/awarded? Are they effective in your view?
- Are there sales incentives? What are they?
- What aspects of your job do you find challenging?
- What communication tools are in place for management and staff?
- What metrics are used to determine sales incentives?
- Which products are best sellers? Which are the most profitable?
- Do you know which representatives answer the most calls per hour? What do you feel enables them to do so?
- Who are your top sellers? Who are your newest representatives? What is the sales difference?

Human Resources Practices
- Are TO/CSS salaried or hourly? Do the hourly's clock in/clock out at start/end of day and breaks?
- Do the employees have the prerequisite skills and aptitude to fulfill the role?
- How do you find recruits?
- Does HR conduct exit interviews? If so, what have you learned from them?
- What do you learn from employee satisfaction surveys? Has there ever been one?
- How many TO's must a CSS support? (More broadly, what does the "org chart" look like?
- What are the management styles and training for supervisors?
- What are the protocols and processes for recruiting and hiring of TO's, CSS's and Warehouse staff?

- What do they hope to accomplish through revising performance evaluation process?
- What will the new HR performance evaluation look like?
- Has there been a recent local market-analysis for employee compensation conducted?
- Who on the management team is involved in new hires?
- Why are employees being terminated?
- In your view, why are people quitting?
- How many years of call center experience?
- Education level of TO, CSS?
- Technical proficiency of TO, CSS?

Managing Growth
- Is the warehouse ready for the increase in volume?
- What is its capacity in terms of staff and space?
- Can your current staffing levels accommodate projected growth?

Activity 2 – Focus Groups Customer Service Supervisors

Details of Activity/Method

The project manager and project coordinator will conduct a 45- minute focus group. The project manager will be the lead moderator who facilitates the discussion. The project coordinator will be the assistant moderator, who will take copious notes and operate the tape recorder.

A focus group will enable START to elicit responses that are spoken, open-ended, and qualitative. Nonverbal communication and group interactions can also be observed, so the team can get closer to what people are really thinking and feeling.
There will be light snacks and beverages in the room, along with a box of Kleenex. The PM and PC will warmly greet all focus group attendees as they enter the room.

The participants will be informed of the reason for the forum. "START has been contracted by PJ Enterprises to help them reach some goals for the next year. We're here to learn about current state of the organization and how the day-to-day operations run. We're interested in meeting with the Customer Service Supervisors, as your experience is valuable to understanding what it is like to be in the call center. You observe first hand what is working well and what is presenting challenges."

The participants will be reassured that names and other identifying characteristics will left out of any notes or documents produced as a result of this focus group and will be encouraged to give specific names during the focus group.

During the course of the focus group, the moderator will ask probing questions in order to elicit full and comprehensible responses from the participants. Questions may include: "Can you talk about that more?" "Help me understand what you mean?", "Can you give an example?"

Both moderators will remain neutral (but still friendly and approachable) in their nonverbal and verbal communication, as to not influence the attendees' responses.

Questions to Ask

- How long have you worked at PJ Enterprises? How long have you worked in Customer Service?
- Think about some of your telephone operators who are "star performers." What are some behaviors and actions they exhibit that you would like to harness and share with everyone on your team?
- We'd like to do a couple of role-playing exercises. We would like each of you to take turns as either a telephone operator or a customer. We'd like to observe what makes for a very successful call from the moment the call from the moment the customer finishes dialing to when he/she hangs up the phone.
- In the event the group demonstrates introverted tendencies, the project coordinator will have the following alternative ready. This alternative can also be addressed at the end if there is time left before 45 minutes is up. We'd like to play a couple of calls for you. We'd like you to listen to the interaction and then tell us the positive attributes that the telephone operator demonstrates. We'd also like you to tell us what you would suggest as areas of improvement.
- Can you give us scenarios in which a telephone operator needs to transfer a call to a supervisor? What would you suggest is the solution for reducing the number of transfers to the supervisors?
- Why do you think the telephone operators are not reaching the 6 calls an hour goal? What challenges have your team members expressed to you about this metric? What have you observed as a challenge?
- How are new employees trained? Can you walk us through the onboarding program?
- What is your perspective about why customer service scores are down and customer complaints have increased?

Activity 3 – Survey Employees

Details of Activity/Method

Employees of PJ Enterprises will be sent an electronic survey to gather information about their job, how they feel about management, their work environment, training, and any issues that exist, and how they might be resolved. This survey should take approximately 15 – 20 minutes and will be completed during paid work time.

Questions to Ask

All Employees

How long have you worked for PJ Enterprises?
( ) 6 months – 1 year
( ) 1 – 3 years
( ) 3 – 5 years
( ) over 5 years

What is your primary job area?
( ) Customer service
( ) Telephone sales
( ) Catalog department
( ) Merchandise department
( ) Human resources

What shift do you work?
( ) 8am – 4pm
( ) 4pm – 12 midnight
( ) 12 midnight – 8am

Do you work full-time or part-time?
( ) Full-time
( ) Part-time

- Do you feel the work you do contributes to the success of the company?
- What resources would help you to do your job better?
- What do you like least about your job?
- What do you like most about you job?

Telephone Operators
- Do you feel six calls per hour is a reasonable goal?
- Why do you think the six call per hour goal is not being met?
- Do you feel your training has been adequate to do your job?
- How long do you spend on a typical call?
- Why would you transfer a call to a supervisor?
- What customer questions do you find the most difficult to answer?
- How much time elapses between your training and answering calls on those products?
- What do you do if you have a question about a product?
- Describe the process of a typical call.

Customer Service Supervisors
- What questions typically result in a transfer to a supervisor ?
- Are Telephone Operators offered incentives for higher sales?
- Do you observe your employees on the floor?
- How often do you review call metrics with employees?
- Are telephone operators trained on how to use the order application software?
- Is there sufficient call volume to substantiate a requirement of six calls per hour? If so, what happens to the calls not being handled by the telephone operators?

Catalog Department
- What effect, if any, has producing the catalog four times per year had on sales?
- Are the timings for the catalog mailings appropriate for the targeted seasons?

Merchandise Department
- How often are new items rotated into the catalog?
- What determines when a product is rotated out of the catalog?

Human Resources
- Do new employees receive an orientation to the company and products?
- What days and times are the monthly employee meetings held?
- What methods do you use to recruit new employees?
- Do you conduct exit interviews? What are the most common reasons given for leaving?
- Are there alternate times available for employees not able to attend the monthly meetings?
- Are employees given an accurate description of their job competencies?

Activity 4 - Documentation Review

Details of Activity/Method

Record review will serve as a non-human resource in the performance analysis process. START will use production timelines, call volume data, shift schedules, metrics data, customer service data, automated system desktop procedures/screen shots, IT information, information on employee turnover/termination, training schedules/curriculum, employee work history, employee education, and sales statistics to broaden the teams understanding of departmental needs and potential performance gaps.

- START will request a production timeline from Judie Thompson and Sheena Perez.
- START will request call volume data, employee staffing information, metrics data, training timelines/curriculum, and automated system desktop procedures/screenshots from the customer service supervisors.
- START will source IT request data from Bruce Bennett/Yun Sien to determine if technology may have an impact on job performance. SMART will also attempt to source a graphic representation of how calls enter the system and are assigned to telephone operators. In addition, START will acquire any reports IT runs on behalf of the department.
- START will request employee turnover/termination data and exit interview information from human resources. SMART will also task HR with providing information on employee work history and education level.
- START will request sales statistics information from Jane McKenzie and/or Mike Merrill to determine best sellers and the possible need for strategies to increase sales of other products.

Questions to Ask

Is the requested information available, and what is the timeline for receipt?

Activity 5 – Observations Telephone Operators

Details of Activity/Method

START will conduct structured observations of Telephone Operators (TOs) for 2 hours out of each schedule shift. Observations will follow a single TO for 30 minutes, resulting in the observation of 4 TOs per shift. Only willing volunteers will be observed and they will know when the observations are happening. The observer will use a listen-only headset to observe call interactions and remain as unobtrusive as possible when TOs are no on calls. The reported data will be aggregated and anonymized by shift. In the event of a lack of willing volunteers, the observer will listen to call recordings. It is important that these observations provide a snapshot of the current state rather than a formal diagnostic assessment.

Questions to Ask

When TOs are on a call, the observer will use an event-recording document to track the following key behaviors:

- Using scripted prompts
- Conversing off-script
- Computer system retries/missteps
- Referencing job aids

The observer will also note whether each call ended in a sale. When TOs are not on a call, the observer will use a duration recording document to track the amount of time spent working outside of direct customer interactions and making brief notes on the type of work if possible. The observer will also use an event-recording document to track the frequency of work disruptions making brief notes of the type of disruption when possible.

Activity 6 – Observations Facilities

Details of Activity/Method

A member of the START team will tour PJ Enterprises call center and warehouse recording descriptive observations.

Questions to Ask

Examining floor plans and noting any areas of congestion or possible inefficiency.

Ways in which the layout of the space may facilitate or inhibit productive collaboration and communication.

Taking snapshots of workstations in use to assess existing ergonomics and identify possible opportunities for improvement.

Making subjective observation of the light and noise levels in the space as well as observing the ways employees respond to environmental conditions, for example whether they have fans or extra clothing layers nearby.

Roadblocks & Dependencies

These are potential roadblocks or dependencies that could impact the success of conducting the gap analysis.

Roadblocks / Dependencies	Mitigation Strategies
Reluctance on the part of staff and management to participate in the information gathering. For example, TO's may be unsupportive because they perceive that their workload will increase as a result of this change project.	START will impress upon employees the importance of information gathering, explain "what's in it for them", make is easy to respond, and incentivize participation when possible. At the end of the interview, notes will be sent to the interviewee for review. More time will be spent with non-supportive stakeholders to identify likes and dislikes, unspoken needs, constraints, past experiences that might impact analysis process.
Insufficient time allocated to allow employees to participate in the information gathering activities due to reluctance on the part of management or operational workload of the business.	As part of the planning for the data gathering, START will present to management a time-line that details sufficient time needs for administering and analyzing results as well as subsequent work dependent on results elicited. START will impress upon management to allow flexibility of staffing to support information-gathering activities such as scheduling participation during low volume hours or as compensated over-time.
Reluctance on the part of staff to participate openly and honestly in focus groups.	START will work to gain employees' confidence and trust. When creating groups START will aim to create homogeneous groups but also considering factors that will impact participation and communication such as culture and influence. Cultural factors that could impact how they interact, view their role, interpret verbal and nonverbal communication include age, language, departmental

Roadblocks / Dependencies	Mitigation Strategies
	and organizational culture. Individuals' level of influence to be considered includes business relationships, knowledge, reputation, experience and success. Notes and results of focus groups will eliminate specific names to preserve anonymity as much as possible.
Potential lack of willing volunteers for the structured observation.	Observation time will be spent listening to call recordings to gather as much comparable information as possible.
During observations, job performance of TO's will be influenced by the presence of the observer.	Trained observers make every effort to passively observe so as not to disturb the TO's. By only working with voluntary participants, the observers avoid adversarial dynamics. The results of the observations are interpreted as a small snapshot with significant limitations rather than a formal diagnostic assessment.