

Design Document

Document Description

The purpose of this document is to provide a detailed description and outline of the Telephone Operator training that START will deliver to PJ Enterprises in August 2016.

Purpose of the Course

The purpose of the course is to train Telephone Operators and Customer Service Supervisors on call standards, and to enhance their sales and service skills as well as their efficient use of the newly reorganized product guide. The trainings will help increase sales, improve customer service scores and decrease call time helping PJ Enterprises to meet their financial and business goals.

Audience Description

Telephone Operators and Customer Service Supervisors are women and range in age from 18 to 60 years, with a small number in the 35 to 55-age range. None have college degrees, however several have had some college. All have completed high school or a GED. Some have had prior call center experience; however, this is a first job for most. Supervisors began as telephone operators who had shown exemplary sales and service skills and were promoted.

Course Description

The course is designed to support Telephone Operators and Customer Service Supervisors in developing and refining key skills for handling customer sales and service requests in a courteous, accurate and efficient manner. The instruction is delivered in three consecutive modules delivered over the course of two weeks.

Course Seat Time

Learners will participate in a total of 8 hours of instructor-led training.

Instructional Architecture/Strategy for Course

The overall instructional architecture for this course is directive. Instruction provides explicit explanations and demonstrations of concepts, processes, and procedures, and learners are provided multiple opportunities for practice and feedback. These practice opportunities include guided group practice discussions, collaborative practice activities designed to reinforce new material, and authentic, scenario-based role-plays for immediate application of course content. The training is designed for near transfer of processes and procedural

task information. While some of the customer service topics require a low level of far transfer and judgment, instruction is primarily based on directing learner actions to complete processes and procedures rather than having them develop their own strategies and thought processes through experiential learning. While instructional activities in role-plays and review of authentic examples lend themselves to guided discovery on a low level, the primary architecture is directive.

Major Course Objectives

By the end of the course, the learners will be able to

- Perform customer service skills with meeting proficiency criteria per the Call Quality Rubric.
- Implement upselling and cross-selling techniques with no errors.
- Find requested products in the electronic product guide in less than one minute.
- Conduct a live customer call performing customer service skills, upselling or cross selling techniques, and finding requested products in the product guide while meeting proficiency criteria per the Call Quality Rubric.

Learning Assessment for Course

Learners will complete a performance assessment in class at completion of the 8-hour customer service skills course. Course instructors will observe two live calls for each direct report and provide feedback regarding key objectives based on the Call Quality Rubric.

Course Outline

START 

PJ Enterprises Instructional Outline

Lesson I. Course Introduction

- A. Introduce instructional designer/business analyst and share background to promote a sense of credibility
- B. Discuss the current state and purpose for creating this course
- C. Discuss course objectives and course agenda
- D. Distribute course materials

Lesson II. Basic Ingredients of Successful Calls

- A. Lesson Introduction
- B. Developing an appropriate greeting and introduction
 1. Overview of basic elements
 2. Exercise-write out a greeting and introduction

3. Exercise-share greeting and introduction with partner for feedback
 4. Report-out and Summary
- C. Following basic chat flow
1. Overview of the chat flow principles
 2. Exercise-Audio Examples and discussion
 3. Group Activity- Given phrase notecards, learners work in small groups to choose the best order based on the chat flow principles
 4. Report out and Summary
- D. Closing a call
1. Overview of basic elements
 2. Exercise-write out a closing
 3. Exercise-share closing with partner for feedback
 4. Report out and Summary
- E. You are the key ingredient; using tone, pace, and volume
1. Overview the impact of non-verbal signals
 2. Using learner-generated greetings and closings, demonstrate examples and counter examples of optimal tone, pace and volume
 3. Exercise - review of audio examples assessing tone, pace, and volume
 4. Exercise – given scripted scenarios, learners role-play calls for optimal tone, pace and volume
- F. Lesson Review and Summary

Lesson III. Tools for building satisfaction

- A. Lesson Introduction
- B. Finding products quickly in the new product guide
1. Procedural overview via projected demo
 2. Step-by-step directed practice
 3. Exercise-Independent practice scavenger hunt
- C. Using acknowledgement phrases definition and purpose/reference list
1. Overview of appropriate phrases
 2. Exercise- give students scenario phrases and have them respond with acknowledgement
 3. Exercise- Listen to an example call and discuss where the TO used acknowledgement/missed opportunities
 4. Summary
- D. Using open-ended questions to drive the conversation
1. Overview of Strategies
 2. Exercise-Audio examples and discussion

3. Exercise-Given a scenario, TOs develop a question that would drive the conversation forward
 4. Summary
- E. Using active listening strategies for success
1. Overview of Strategies
 2. Exercise-Discussion of audio examples
 3. Exercise- Close method script- trainees fill in responses that demonstrate methods
 4. Summary
- F. Lesson Review and Summary

Lesson IV. Upselling/Cross-selling

- A. Lesson Introduction
- B. Overview of strategies (product of the week, related product, sale/promotion, catalog referral)
- C. Using the product reference for sales strategy information-
1. Procedural overview via projected demo
 2. Step-by-step directed practice
 3. Exercise-Independent practice, given a list of requested products, use the product reference to find recommended products
- D. Group brainstorm of where to ask in the call
1. Overview-Group discussion-When does the upsell/cross-sell opportunity pass?
 2. Exercise-Authentic upselling and cross-selling audio examples/discussion
 3. Summary
- E. Lesson Review and Summary

Lesson V. Productive Problem Solving

- A. Lesson Introduction
- B. De-escalating upset customers
1. Introduction
 2. Overview of strategy
 3. Exercise-Scenario discussion
 4. Summary
- C. Implementing “I don’t know” alternatives
1. Overview of strategies
 2. Exercise-Audio scenarios and discussion
 3. Summary

Final Assessment: Pulling it all together “In the Wild”

- A. Assessment Introduction

1. Overview
 2. Emphasize the formative intent
- B. Assessment Logistics
- C. Conduct Call Observations

Media

START will utilize live demonstrations of software use projected for group viewing and guided practice on student computers. Presentation slides will be used throughout the training incorporating audio and/or video where appropriate.

Development Tools

A variety of software programs will be used to develop the final course deliverables including:

- Microsoft Office Suite – Word, Excel, PowerPoint, and Publisher.
- Microsoft Visio.
- Adobe Acrobat Pro.

Development Time

START will require 400 hours for development of the training. These hours include any hours already used in the initial assessment of the project.

Support requirements

In order to complete the course, PJ Enterprises will help START in the following ways via SMEs, recordings and written resources:

- Reviewing all material, in a timely manner, to ensure that they are accurate and complete.
- Providing suitable equipment and space to deliver training as outlined in the design document.
- Working with START to determine an acceptable development and training schedule.
- Providing examples to use in the training.
- Establishing the training rollout schedule and scheduling shifts to ensure that all telephone operators and customer service supervisors are able to attend.
- Printing and assembling all hard copy course materials.

Ownership

START will maintain all training materials developed for PJ Enterprises through December 2016, after which PJ Enterprises will maintain

materials. If PJ Enterprises would like START to continue maintenance of documents beginning 2017, START will be happy to provide a proposal for this service.

Project Sign-off

Please sign below indicating agreement with the proposed course plan and approving start-up of the development phases.

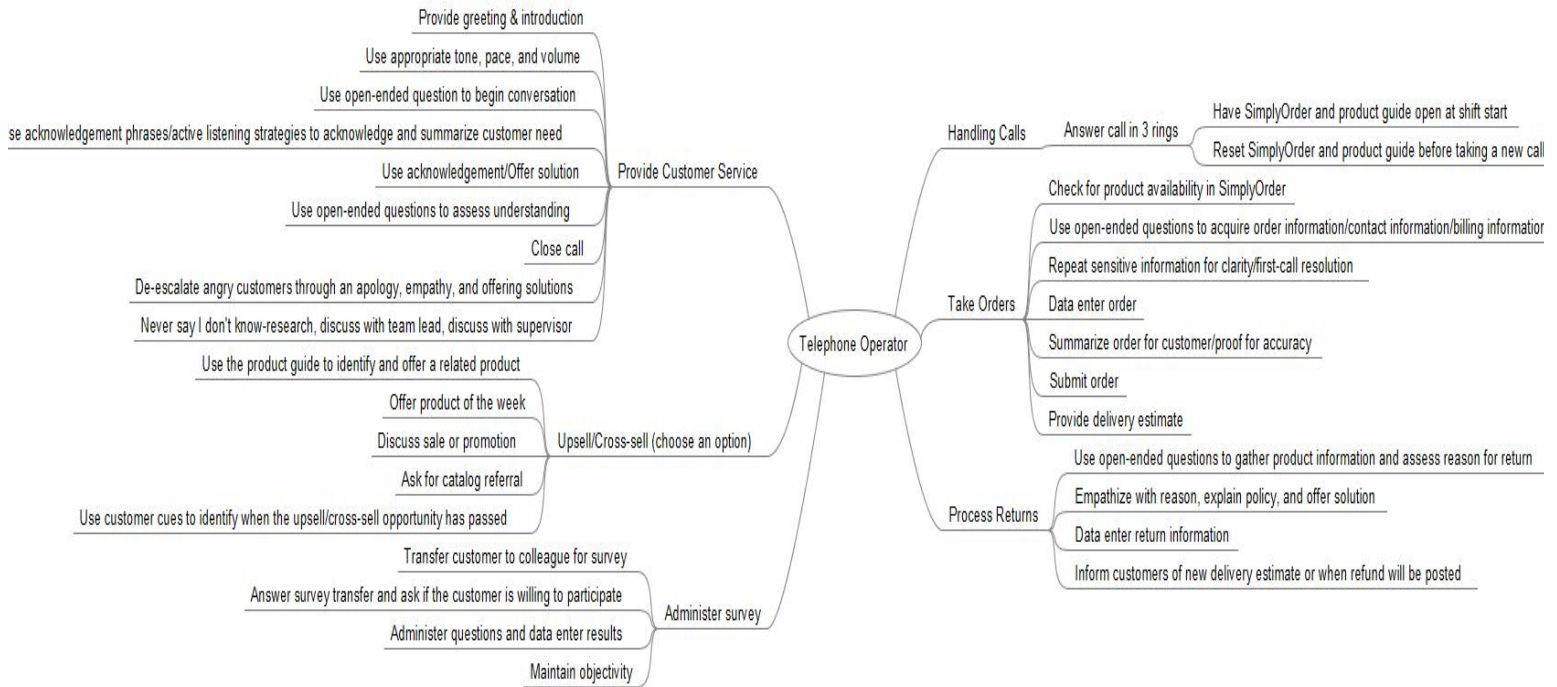
Instructional Designer

Date

Project Manager/Sponsor

Date

Appendix A: Job Task Analysis



Appendix B: Detailed Course Outline

Course outline for Introduction:

	Min.	Task / Topic Key Concept	Objective	Instructional Method	Assessment Method	Assessment Description	Visuals / Media Support
I	15	Course Introduction <ul style="list-style-type: none"> • Training Team Introductions • Purpose • Objectives • Agenda 		Presentation of Facts			Slides

Course outline for finding products in the product guide:

	Min.	Task / Topic / Key Concept	Objective	Instructional Method	Assessment Method	Assessment Description	Visuals / Media Support
3 B	10	Introduction - Searching the Product Guide Options <ul style="list-style-type: none"> 1-Search Index using Major Categories and their Sub Categories 2-Search for a product or descriptive term(s); Product Guides open on their computers 	NA	Presentation of facts	NA		Slide-Search Options

	Min.	Task / Topic / Key Concept	Objective	Instructional Method	Assessment Method	Assessment Description	Visuals / Media Support
3 B 1, 2	15	Search Option 1: Search Product Guide Index using Major Categories and sub headings.	Given a customer request for a product, the learner will access Index to navigate to the desired Product Screen	Demonstration of procedure 1-Click on category or sub-category to jump to Category Sub-Index. 2-From Category Sub-Index, click on the product to view product screen.	Method: Application of procedure Description: Learners will be given a 1) a product name “Poppy Pullover” and 2) a product category (décor) and product descriptor (“floral table runner” and navigate to their Product Screens	Electronic Product Guide Index displayed; Product Guide Index on learner computers	
3 B 3, 4	20	Search Option 2: Perform a basic or advanced search using product name or descriptive term(s) in the Product Guide	Given a customer request for a product with either a product name or descriptor, the learner will perform a basic or advanced search navigate to the desired Product Screen	1- Demonstration of advanced search procedure 2- Demonstration of Sample Search Request Using Advanced Search Options (“Easter”, “Candle”)	Method: Application of procedure Description: Learners will conduct: 1) a basic search with only a product name (“Football Kneepads”; and 2) an advanced search with descriptive terms (“bracelet”, “beaded) and navigate to their Product Screens	Electronic Product Guide displayed; Product Guide on learner computers	

	Min.	Task / Topic / Key Concept	Objective	Instructional Method	Assessment Method	Assessment Description	Visuals / Media Support
3 B 5	10	Cumulative Exercise – Product Scavenger Hunt	Given customer requests for products, learner will select appropriate search method (Option 1, Option 2 or Option 2 Advanced Terms) based on available information and navigate to order processing window.		Method: Application of procedure Description: Given customer requests for products, learner will perform 3 searches and navigate to product screen, select desired criteria, proceed to Order Processing window. Search 1) Index Category and Sub-Category Search; Search 2) Basic Search using category and descriptor; Search 3) Advanced Search with descriptive terms only		Product Guide and Order Processing window on learner computers

Course outline for de-escalation:

	Min.	Task / Topic / Key Concept	Objective	Instructional Method	Assessment Method	Assessment Description	Visuals / Media Support
5B 1	5	Introduction Summary CARP for De-Escalation	N/A	Presentation of facts.	N/A	N/A	• Slide with title and objectives
5B 2 5B 3	10	Control <ul style="list-style-type: none"> • <i>Let the customer speak.</i> • <i>No interruptions</i> • <i>Serious, calm, confident tone</i> • <i>Note-taking</i> • <i>Don't push back.</i> • <i>Avoid "There's nothing else I can do for you."</i> 	Given a call with an angry customer, the telephone operator will reassert control over the call.	Description of the principle-based task	Method: Application of principle-based task Description: Learners will reassert control during a role-play exercise.	<ul style="list-style-type: none"> • Job aid with steps and sample phrases. • List of guidelines on PP slide. • Audio of sample call. 	

5 B 2 5B 3	10	<p>Acknowledge - <i>"I can understand how frustrating it is"</i></p> <p><i>"I imagine how upsetting it is to..."</i></p> <p>- <i>"I'm so sorry to hear that..."</i></p> <p>- <i>"I'm glad you called today so that we can take care of this right away."</i></p>	Given a call with an angry customer, the telephone operator will communicate empathy by using one or more of the recommended phrases	<p>Description of the principle-based task</p> <p>Demonstration of task via role-play with instructor and volunteer</p>	<p>Method: Application of principles</p> <p>Description: Learners will use acknowledgment phrases during a scripted partner role-play exercise where one learner will be the TO and the other will be the customer.</p>	<ul style="list-style-type: none"> • Job aid with steps and sample phrases. • List of steps on PP slide.
5 B 2 5B 3	10	<p>Refocus</p> <ul style="list-style-type: none"> • <i>Active listening</i> • <i>Timing for responses</i> • <i>Recap</i> • <i>Open-ended questions</i> • <i>Phrases to avoid</i> • <i>Phrases that encourage dialogue</i> • <i>Phrases that focus on the issues</i> 	Given a call with an angry customer who requests a supervisor, the telephone operator will use strategies to refocus the customer to the issue.	<p>Description of the principles</p> <p>Demonstrate using role-play.</p>	<p>Method: Application of principles</p> <p>Description: Learners will refocus the customer during a scripted partner role-play exercise where one learner will be the TO and the other will be the customer.</p>	<ul style="list-style-type: none"> • Job aid with steps and sample phrases. • List of principles on PP slide. • Audio of sample call.
5 B 2 5B 3	10	<p>De-escalating customers: Problem Solve</p> <ul style="list-style-type: none"> • <i>Apologize</i> • <i>Options and timelines</i> • <i>Confirm satisfaction</i> • <i>Other improvements</i> • <i>Follow ups</i> 	Given a call with an angry customer, the telephone operator will work with the customer to reach a resolution 100% of the time.	<p>Description of the principles</p> <p>Demonstrate using example recorded call.</p>	<p>Method: Application of principles</p> <p>Description: Learners will reach a solution with a customer during a scripted partner role-play exercise where one learner will be the TO and the other will be the customer.</p> <p>Use checklist to identify use of CARP de-escalation strategies while observing role-play.</p>	<ul style="list-style-type: none"> • Job aid with steps and sample phrases. • List of principles on PP slide. • Audio of sample call.

5B 1	5	Review	Presentation of Facts	N/A	<p>Method: Application of Principles</p> <p>Description: Learners will complete an exit card upon the completion of the lesson to demonstrate their understanding of the CARP de-escalation strategies.</p>	Slide with summary
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Appendix C: Final Assessment

PJ Enterprises Call Quality Rubric (revised 4.10.16)						
Telephone Operator Name						
Call Reviewer's Name						
Date and Time of Call						
Reference Number						
Customer Type		New	Returning	N/A		
Call Type		New Order	Return	Question/Info Seeking	Complaint	Other
Total Score:		95-100% Meets Expectations		90-94% Proficiency		
		85-89% Approaching Proficiency		84-or less Below Proficiency		
		Yes	No	N/A	Coaching Comments	
	Call Anticipation	5%				
	Answered the call within three rings.					
	Displayed Product Guide before the onset of the phone call					
	Customer Service	30%				
	Greeting and Introduction					
	Used standard call greeting per standardized chat flow.					
	Professionalism, energy, and enthusiasm established at onset of call.					
	Customer Acknowledgement/Active Listening/Open-Ended Questions					
	Addressed the caller by first and or last name (with appropriate prefix); or Sir/Ma'am/Miss if name is difficult to pronounce.					
	Used one of the following phrases per the standardized chat flow: <i>"I would be happy to assist you with __."</i> <i>"It will be my pleasure to __."</i> <i>"I understand that __."</i>					
	Avoided silence; kept the customer informed about what was happening.					
	Used clear and concise words to ensure the customer that the TO understood the purpose for the call.					
	Used Open-ended questions to clarify or seek more information from the customer.					
	Accurately understood the nature of the					13

	customer's inquiry.				
	De-escalation Strategies (CARP)				
	Remained in control of the call <i>Let the customer speak; Did not interrupt Did not try to lighten the mood with humor. Did not provoke or push back.</i>				
	Acknowledged the customer's concern by using phrases like: <i>"I can understand how frustrating it is when.." "I cannot imagine how upsetting it is to..." "I'm so sorry to hear that..."</i>				
	Refocused the customer by doing the following: <i>Recapped or paraphrased the concern. Asked open-ended questions for clarification. "Let me see what I can do for you first. I would really like to help." "I'm glad you called today so that we can take care of this right away."</i>				
	Developed a solution with the customer to achieve satisfaction by doing the following: <i>Apologized (again) Avoided "I don't know;" Gave options and approximate timelines Confirmed the customer's satisfaction Followed up actions in a timely and correct manner in order to keep commitment to the customer.</i>				
	Taking Orders	30%			
	Searched the product reference to answer customer's question about a product.				
	Gathered appropriate information by using acknowledgement phrases and open-ended questions.				
	Repeated sensitive information to ensure accuracy for a first-call resolution.				
	Accurately summarized orders and estimated delivery.				
	Upselling/Cross Selling	10%			
	Recommended appropriate product/service to meet customer need or extend the relationship.				
	Effectively tied product/service benefit to the customer situation/need.				
	Quickly referenced information in the product guide to answer customer questions.				

	Call Closing	5%				
	Used appropriate call closing statements per the standardized chat flow.					
	Ensured that all the customer's needs were met.					
	Accurately documented any additional information (if applicable)					
	Thanked the customer and wished the customer a good day.					
	Communication Skills	20%				
	Used professional language and appropriate grammar.					
	Spoke clearly and at a pace/rate appropriate for the customer.					
	Expressed politeness by saying please, thank you, I am sorry, etc.					