EME 5601

Introduction to Instructional Systems

Needs Assessment Proposal

By

John Weber
March 4, 2006
Local call center to loose 200 jobs

The Orange Park Call Center, which provides customer service for a major computer company will close next week with the loss of 200 local jobs. J. Jones, Vice President for Client Affairs, at the center’s Maine-based headquarters stated that the closing was due loss of high costs and lack of employee motivation. One employee, J. Smith, was quoted to say “It wasn’t lack of motivation. They just didn’t give us the tools to do our job”.

This call center will provide a basis to prepare a needs assessment proposal for Assignment 2. The purpose of writing this proposal is to understand the assessment concepts of: overview, rationale, feasibility, and planning.
Table of Contents

Overview ............................................................................................................................ 4
Rationale ........................................................................................................................... 5
Feasibility .......................................................................................................................... 8
Objectives ......................................................................................................................... 9
Target Audience .............................................................................................................. 9
Sampling Method ............................................................................................................ 9
Data Collection Strategy and Tactics ............................................................................ 10
Instruments and Protocols ............................................................................................ 11
Implementation ............................................................................................................... 11
Overview

Small Force, Inc. is a customer service call center headquartered in Maine, and is an outsource company for Big Computer Company. Several years ago, Big Computer created a customer care call center in the country of Offshore as a cost savings measure. Offshore has an English-speaking and technical astute population with average wages much lower than the United States. These lower wages make a big difference in profit margins. Thus, when operating a call center, the center’s cost per minute (which includes such components as wages, health care, building operating costs etc.) in Offshore might be $4.00 per minute while a U.S. based call center the cost might be $8.00 per minute.

However, customers began complaining about the service of calls handled in Offshore because the U.S. customers could not understand the Offshore dialect or thought they did not know the issue. This led to Big Computer searching for U.S. based call centers but with lower costs per minute.

Small force proposed to Big Computer to open a center in Orange Park (OP), Florida where the average wages are lower than most of the country. Big Computer agreed, but wanted to do it only for a trial one year period. Customer satisfaction survey data was telling Big Computer corporate executives that the Offshore site was still receiving favorable marks from customers. However, if the OP site could outperform the average customer survey score for the Offshore site, then a long-term, multi-million dollar contract would be awarded to Small Force.

After establishing the OP call center, Small force organized it as below:

The call-center manager is responsible for the daily operations of the center and maintaining service level. Service level is the contractual level of required calls to be handled per hour. With headcount of 300 customer service representatives, each
representative needs to process a call once every eight minutes. If the service level can not be met, then Small Force is penalized $3,000 per day.

The five employee managers handle the day to day activities of their forty representatives. Such activities are disseminating company policy and following up on attendance issues.

The IT Department handles all information technology issues such as internal and external communications. This department also can monitor employee e-mail usage.

The Client Services department coordinates with Big Computer and is responsible for obtaining and reviewing all customer survey data for the call center.

The Training Manager is responsible for ensuring weekly training is conducted. It is classroom based and is intended to be refresher training for the initial employee new-hire training. This manager also disseminates Big Computer policy and procedure changes via e-mail to the employees and managers, which average twice a week.

The Human Resource Department handles the hiring and terminations of all employees and collects exit interview information. This department also provides new-hire training in regards to call-center policy and procedures.

The employees handle all customer service questions and process customer requests such as returns.

Rationale

In a conference call with the Small Force Vice President of Client Services, the call-center manager described the center’s current status:

- Increased customer dissatisfaction with OP service. This customer satisfaction level is at 70%.
- Service level has not met contractual requirements for the past five days.
- Employees are absent from their assigned shifts. There is a point system to deter absenteeism (three points per day missed and the employee is terminated for cause after 24 points). However, some employees are over the 24 point mark and have not been terminated
- Employees complain that there are too many e-mails to read in a day. Some state that they never received certain e-mails. Sometimes electronic mail is sent to the entire workplace when it was intended to just go to the sender’s work group.
- Employees complain that they did not receive all of their initial hire training.
- Managers state that employees have poor time-management skills and have excessive hold and paperwork processing times.
- Trainers state that they have to go over too many basic new-hire concepts in the weekly training.
The Vice President has contracted a needs assessment team to examine these issues and determine if a needs assessment should be conducted to evaluate performance problems and develop instructional solutions.

The assessors have determined three main symptoms of non-ideal performance:

Increased absenteeism
Decreased Service Level
Decrease participation in weekly training attendance

The center’s current performance vs. ideal performance (as described in the call-center operations manual) is listed below:

<table>
<thead>
<tr>
<th>Performance Problems</th>
<th>Current Performance</th>
<th>Ideal Performance</th>
<th>Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>Decreased Weekly Training Attendance</td>
<td>60% Attendance</td>
<td>&gt;/=95% Attendance</td>
<td>35%</td>
</tr>
<tr>
<td>Decreased Workplace Attendance</td>
<td>70% Attendance</td>
<td>&gt;/=85%</td>
<td>15%</td>
</tr>
<tr>
<td>Decreased Service Level</td>
<td>50% (average)</td>
<td>&gt;/=90%</td>
<td>40%</td>
</tr>
</tbody>
</table>

The assessment team believes that the three symptoms are linked together mainly due to training deficiencies as listed in the graph below. That is lack of procedural and policy knowledge after new-hire training creates frustrated employees who do not want to come to work because they feel ill-equipped to do their job. This creates fewer employees to handle calls which cause a decreased service level. To meet service level demands, employees are probably pulled early from weekly training events. This creates even more ill-equipped employees and the cycle continues. This cycle is most likely the reason for poor customer satisfaction survey scores.
However, the needs assessment team feels that a needs assessment is required to answer the following questions to accurately analyze and correct the call-center’s performance:

- Is the customer survey data consistent with the current call-center climate?
- Can the above cycle be observed under real site conditions?
- Are the non-ideal performance factors increasing over time?
- When did the non-ideal performance manifest itself?
- Does the current training provide the desired level of performance?
- To what extent is the overall performance gap of the three symptoms attributed to training deficiencies?
- What changes can be made to minimize the impact to operations?
- What is the average time a customer-service representative stays on the job?
Feasibility

The assessment is estimated to take two months. The assessors, Jane Doe and John Smith, will charge by the hours worked on the project. It is assumed that not all of their time will be devoted to the project during the two months. Their costs are listed below:

**Costs**

<table>
<thead>
<tr>
<th>Personnel</th>
<th>Rate</th>
<th>Total Days</th>
<th>Total Hours</th>
<th>Costs (Dollars)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jane Doe</td>
<td>$35/hr.</td>
<td>10</td>
<td>80</td>
<td>2800</td>
</tr>
<tr>
<td>John Smith</td>
<td>$35/hr.</td>
<td>10</td>
<td>80</td>
<td>2800</td>
</tr>
<tr>
<td>Airfare</td>
<td>$500/r.t.</td>
<td>1 r.t.</td>
<td></td>
<td>500</td>
</tr>
<tr>
<td>Jane Doe</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>John Smith</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hotel</td>
<td>$75/day</td>
<td>5</td>
<td></td>
<td>375</td>
</tr>
<tr>
<td>Jane Doe</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>John Smith</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rental Car</td>
<td>$50/day</td>
<td>5</td>
<td></td>
<td>250</td>
</tr>
<tr>
<td>Per Diem</td>
<td>$60/day</td>
<td>5</td>
<td></td>
<td>300</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td></td>
<td>8200</td>
</tr>
</tbody>
</table>

Note: One week is one site; one week for analysis
r.t.= round trip

Currently the call center has lost $15,000 in service level penalties. These penalties, which most likely will continue, and the potential loss in loosing a multi-million dollar contract greatly outweigh the costs of a needs assessment.
There are assessment documents, such as the customer surveys and exit interviews, which are easily accessible. This will shorten the timeline and make this assessment even more feasible.

**Objectives**

The team will focus on four primary areas: attendance, service level, training, and customer satisfaction.

**Attendance**

Identify the reasons of low employee attendance and attract more employees back to the workforce. Identify if there are reasons to this based on skills and abilities such as employee frustration due to not knowing or understanding proper procedures. Identify if the attendance policy procedures have been communicated clearly. Determine if there are causal environmental factors in regards to attendance by studying historical call-center trends.

**Service Level**

Identify the reasons of decreased service level to close the gaps. Identify if proper time management skills have been taught to enable shorter time processing customer requests. Identify if there are environmental causes such as employees abusing the hold function to talk to friends and not just use it to obtain professional information.

**Training**

Ascertain at what time of day the weekly training is preempted. Determine the employee Microsoft Outlook knowledge level. Determine if the weekly training is time efficient. Determine if current new-hire syllabus is consistent with meeting expected performance goals such as customer satisfaction.

**Customer Satisfaction**

Determine if the customer surveys are consistent with the call-center environment.

**Target Audience**

There are two audience types in this assessment: performers and decision makers. The performers are the call-center employees and the decision makers which consist of the team managers, call-center manager, client services, information technology, human resources and training. This is a total of ten people.

**Sampling Method**
The assessment team will use stratified sampling for 100% of the decision makers to insure all call-center departments are represented. This is feasible since this size is small and it is important to hear all the viewpoints of call-center management to hopefully identify all problems.

The employees will be sampled by judgmental sampling methods. Fifty per cent of the employee individual customer surveys will be examined. This method is chosen since it is a rapid way to view customer comments which can help identify training problems. Also, all (100%) available exit interviews will also be reviewed under this method. The rationale for this sample size is that it is expected that the number of exit interviews will be small, since the call center is fairly new, but possibly have significant information.

Ten per cent of the employees will undergo simple random sampling procedures. This is chosen to view actual work conditions, such as the time processing calls.

**Data Collection Strategy and Tactics**

Information about the call center’s instructional needs will be gathered by the following methods: web-based survey, in-person interviews, direct observation of work, and indirect examination.

Initial phone interview will be conducted with the call-center manager. It is foreseen that the assessment team will allow the manager to just vent his frustrations and empathize with the situation. This will establish rapport between the manager and the assessors and establish a good working environment.

The web-based survey will be sent to the call-center director to gather initial information to establish an idea of the current situation. This will help the team tailor on-site data collection.

On-site interviews with the managers and other staff members will help establish a “team” atmosphere and hopefully promote dialog so as to foster an open environment with the assessors and staff. This will give the assessment team a chance to view the problem solving techniques in place for training (if any), and see if any of the conditions observed prior to the site visit have changed or will change in the near future.

Direct observation of employees’ work will give the assessors first-hand knowledge of how well the performers embodied the training procedures for the center. It will give a chance to view time-management techniques, their overall feeling if the training has provided them with the skill they need to perform their tasks, and how accessible the center’s notification system is in regards to weekly training events and any training updates.

Indirect observation of work will look at two documents: the customer surveys on each employee and exit interviews.
The customer surveys will give an overall trend analysis of the call center over time and give another viewpoint of employee performance. An example of this would be if the customer felt that their issue was resolved, then the employee probably had the technical skills to handle that call. If on the other hand, the customer thought the representative was rude or insensitive, then this could be an indicator that this particular employee might need some more “soft-skill” training with a focus on customer empathy.

The assessment team will also coordinate with the Information Technology department to view employee e-mail usage.

Exit interviews are chosen to obtain any information regarding job dissatisfaction in terms of training. This method is chosen since the center keeps electronic copies of this data and would be easy to review remotely providing inexpensive data collection. They might also point out other non-training factors (i.e. compensation or policy issues) that would be of use to the management team. The possible problem with this data is that it might be biased from a recently separated employee.

**Instruments and Protocols**

The instrument to be used is a commercially purchased web-based survey for the call-center manager.

The protocol method to be followed is first find out if there have been any previous assessments on the OP call center. The Client Services Vice President indicated that Big Computer sent a team about a month ago and it seemed like they were on an “agenda”. The current assessment team will provide the decision makers with all questions during the site visit and provide means to provide suggestions to the assessment. This will be done to promote openness and cooperation.

**Implementation**

The needs assessment will be conducted over a two month period. The assessment team feels that “time is of the essence” to help the call center to stop paying service level penalties and regain its status with its customer to be considered for a follow-on contract.

**First Month**

Set up a phone interview with the call-center manager.

Establish questions for the on-line questionnaire to further establish the current conditions and to see if there is a corrective action plan in place and if there are any projected call center operation changes in the future.

Obtain one customer survey for each employee from the client services department. Also obtain service level data.
Procure exit interview information from the Human Resources department.

Obtain the employee e-mail usage figures from the IT department.

Develop questions for the on-site interviews for both the management and staff and the employees.

Plan site visit travel itinerary and provide to the call-center manager.

**Second Month**

Conduct on-site visit and interviews in the first week of the second month. This is projected to take a week.

Conduct management and staff interviews. Tell staff ways to contact them for any ideas they have for improvement methods. Provide staff with site interview and observation schedule. Provide staff list of questions for interviews.

Identify employees for direct observations and work with staff to view at the most unobtrusive times and check for availability. Check e-mail proficiency, time-saving techniques, training updates, technical and soft-skill knowledge.

Observe service level at any manager station. Pay close attention any deviations from the norm and investigate possible causal factors.

Observe weekly training meetings. Check attendance and ability to conduct training uninterrupted.

Provide the staff with any “on the spot” quick fix (if any) recommendations to help alleviate problems quickly.

Prepare final report with findings and recommendations and procedures for implementation.

Mail report