Project Gap Analysis Strategy

Project Description

The client's (PJ Enterprises) perception of needs is to increase Customer Service representative's product knowledge to increase catalog sales and reduce customer complaints.

The client's expectation of ARBO, Inc. is to:

1. Design, Develop & Deliver an effective product knowledge learning program to increase the knowledge and skills in describing the features and benefits of the catalog products.
2. Deliver program to all telephone operators & supervisors
3. Deliver 4 learning programs throughout; one offering prior to each of the seasonal catalog releases
4. Each catalog item will be covered in training
5. There is a $400,000 **all** staff budget, but the allocated budget for this Customer Service learning program's budget has not been disclosed.

Information Needed

To effectively determine the root cause for the performance issues it will be helpful for ARBO, Inc. to have access to the following:

- Current procedures
- Customer satisfaction survey results,
- Available Recorded calls
- Current Product Guide
- Training materials from prior classes
- Interviews with phone operators as well as management

Team Strategy

Surveys, interviews, observations, focus groups, and document requests will be used to gather data that will be used to determine the cause of the performance issue at PJ Enterprises. Methods will be administered to upper management, IT Managers, Catalog Director, Human Resources, Customer Service Representatives and Customers.

Analysis Plan

	Analysis Activity/Method	Target Audience	Purpose or Information You Hope to Gain	Team Member Responsible
1.	Survey Interview, Documentation Request	Customer Service Supervisors	The goal is to gather information about the perspective of supervisors regarding what is going well and what can be improved upon. Additionally, information about the work environment will be gathered.	Brenda
2.	Interview	Upper Management Jane Smith, Sheena Perez and Judie Thompson	The goal is to gather more information about CSRs and company	Jean
3.	Observation	Telephone Operators	The goal is to determine the actual phone methods and processes	Jean
4.	Focus Group	Telephone Operators	The goal is to understand the Telephone Operator's perspective regarding what is going well and the opportunities for improvements.	Jean
5.	Documentation Requests	Upper Management	Gather data to analyze trends in PJ's customer service process and compare to industry standards in telephone sales.	Jean
6.	Documentation Requests	Sheena and Judie	Procedures related to the call process	

	Analysis Activity/Method	Target Audience	Purpose or Information You Hope to Gain	Team Member Responsible
7.	Anonymous customer satisfaction survey	Customers	The goal of this survey is to replace the current one in place and collect data from customers on their experiences with placing telephone orders.	Joy
8.	IT infrastructure interview	IT Manager(s)	The goal of this interview is to collect data on the current telephone and computer equipment and IT infrastructure at PJ Enterprises.	Joy
9.	Interview	HR Department	The goal of this interview is to gather information about the structure of the HR department, the hiring process, and training and employee advancement.	Stephan
10.	Interview	Judie and Sheena	The goal of this interview is to gather information about providing product knowledge, the structure of the marketing department and training qualifications.	All
11.	Documentation Request	HR Department	Request supervisor evaluations for past 3 years to review the evaluation process and results.	Brenda

Activity 1 Survey Customer Service Supervisors

Details of Activity/Method
Create a survey allowing supervisors to respond to questions. Survey will have a ranking question format with room for optional text on each item. They may also meet with someone to provide individual feedback if they choose.

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Questions to Ask

1. What are the key areas within the operations of the call center that are problematic and why?
2. Does PJ have a Mission Statement?
3. Are there any guiding values within PJ Enterprises that create a culture for employees from which they can unilaterally operate?
4. What benefits do you get from PJ Enterprises?
5. Are you satisfied with your salary?
6. Are there exit interviews with employees that leave?
7. What are the current practices used to provide feedback to TOs?
8. Do you feel the manner in which you are provided feedback is beneficial?
9. Describe in detail the primary performance concerns of CSRs?
10. What would be the ideal work environment look like if it were operating optimally?
11. What key factors in employee performance would need to change?
12. Are there currently built in incentives and/or rewards in your job?
13. Are there any feedback mechanisms to offer employees to provide performance coaching? If so, what are they?
14. What would the ideal workplace provide in terms of support, resources, tools, training and technology?
15. If you were to assess the preparedness of CSRs to do their job in terms of motivation, skill and competencies, and capabilities, what would your feedback be?
16. Speak to the process for which meetings are scheduled for TOs and what your thoughts are about that.

Activity 2 - Interview Jane, Sheena & Judie

Details of Activity/Method

A request will be made to interview the upper management (Catalog Director, Merchandise Director or any other management official who is able to provide information about the Telephone Operators. The information will be used to analyze the CSR metrics, staffing strategies, trends and training needs.

Questions to Ask

1. Would you be willing to share a little bit about the history of PJ Enterprise
2. What can you tell me about the evolution of the Customer Service (department, growth, experiences, and technology)?
3. How many CSRs are currently employed full time? Part Time?
4. What is the staffing strategy for the catalog sales department? How is this determined? Who makes those decisions?
5. What is the average length of employment for a CSR?
6. Do you think employee turnover is an issue? If so…What do you think contributes to this?
7. What do you think would improve employee engagement? this situation?
8. How are the Telephone Operators currently evaluated and for which metrics are held accountable?
9. What is the average call volume?
10. Is the customer call abandonment rate captured? If so, would you be willing to share the average?
11. I noticed in the original information that CSRs are rewarded for 0% errors. Please share a little more about this program. What is the time basis (per week, month, or year)? what is the reward and what constitutes an error?
12. (If they don't mention it in prior question) Ask, how effective is the incentive program? How many different employees receive the reward?
13. Have you witnessed any issues with CSR's motivation depreciating after they make their first mistake in the incentive period of time?
14. Are the CSR's encouraged to up-sell by providing customers with information about complimentary products to promote higher sales?
15. Are the CSR's measured on their availability to take a call? If so, what is the expected level?
16. What Quality Assurance measures are in place for the CSRs? How are they measured? (If QA measured) What are the average scores? Are there any callouts from this data that you think would be impactful to the current CSR issue?
17. What can you tell me about the current product training program? Who designed, developed and delivers this product training program?
18. What development opportunities are available for the CSRs? (If don't get these specifically, ask about coaching, phone skills training, technical skills training, etc.
19. How many years has the product training been offered? Were there any measurements in place to determine the impact for the training?
20. What are your expectations for the associates after training?Are the CSRs allowed to view the physical products during the training session to become more engaged with the product?
21. (For Jane only) Wouldyou be willing to allow me or a member of my team to listen to a few CSR calls to observe their phone skills and product knowledge? It will help me understand the process and the call structure. If possible, I would like to sit with at least one of the top performers and perhaps one of the more challenged CSR. If possible,   a total of 4 different CSRs.
22. (For Jane only) Would it be possible to conduct a focus group with a few of the CSRs to get their perspective on their needs in the learning event?
23. The CSRs complete a customer survey at the end of each call. Would it be possible to receive the survey results for the past year to help us target specific issues?

24. I noticed in the original information that CSRs are required to attend monthly meetings but the meetings are not well attended. What information is shared in these meetings? Why do you think the CSRs are not attending?
25. What would the CSRs need to help them provide One Call Resolution for the customer?

Activity 3 - Observe a sample of CSR taking calls

Details of Activity/Method

We will request to observe at least two of the top performers and at least two of the CSRs experiencing performance challenges. The purpose of this activity is to understand what the employees know, how they actually perform their jobs, what challenges they have, and compare the actual telephone processes to documented procedures.

If we are not able to observe a CSR but receive recorded calls, the calls will be evaluated on the JPs QA measurements, if they exist. If not available we will use Customer Service QA measurements we developed based on industry standards.

Questions to Ask

Questions will be kept to a minimum to ensure service levels are not interrupted. However, in down time, perhaps ask for clarification of a process. The Customer Service QA measurements are list below:

1. Branded the call (provides the customer the company name and his/her name)
2. Followed company procedures
3. Maintains professional demeanor
4. Listens to customer without interruptions
5. Takes ownership of call, successfully completes the customer's order
6. Correctly completes the payment transaction
7. Conveys information clearly and confidently
8. Manages dead air/hold time and/or completed proper transfers
9. Correctly answers all customer questions
10. Ends call with memorable close

Activity 4 – Focus Group – Telephone Operators

Details of Activity/Method
Offer an opportunity for the Customer Service Representatives to share their feedback regarding their job performance, engagement and development opportunities. This information will be helpful to create an effective learning event for them.

Questions to Ask

CSR Focus Group Questions
1. How do you feel the company and your team are doing in customer statisfaction??
2. ?What would you like to see you supervisors stop doing?
3. What would you like to see your supervisors start doing?
4. What would you like to see your supervisors continue doing?
5. What feedback about your performance would be helpful to you?What type feedback do you currently get from your supervisor?
6. Is this feedback effective to you? If not, how would you improve it?
7. What is most satisfying about your job?
8. What is least satisfying about your job?
9. What would you change about your job?
10. What could help you achieve better product knowledge?
11. Describe your current job training experience (what type, how long is the training in hours, how often do you get training).Do you think this training provides you with the tools to to do your job effectively?
12. If not, what training would help you do your job more effectively?
13. How do you like to be rewarded and acknowledged for a good job?
14. Describe the resources and tools that are made available to you to perform you job.
15. What resources and/or tools do you need to be more effective?
16. What de-motivates you?
17. What else would you like to share with me?

Activity #5 – Documentation Requests – Upper Management

Details of Activity/Method
We will request documentation to analyze trends and identify opportunities for improvement.

Questions to Ask
We will request the following documents:

Request for Documents for Customer Service Department (if available and willing to share)	
Documents Requested	Reason
1. Service Levels Report	Analyze trends of when the calls are not being answered at the appropriate Service Level goals (possible over or under staffing)
2. Average Handle CallTime Report	Analyze trends to determine if CSRs are taking too long assisting customer calls. Comparing the suggested handle time with that of the industry standards.
3. Quality Assurance Measurements & Scores	Review if their current QA measurements align with effective QA measurements, if available
4. Net Promoter Score , if available	Determine level of customer satisfaction
5. Abandonment Rate Reports	Analyze trends to determine if there is an issue with customers hanging up between the time they make a selection in the IVR and prior to the CSR answering the call.
6. CSR Error rate Report	Analyze any trends in the error rate and types of errors.
7. Availability Rate Report	Analyze the amount of time associates are available to take customer calls. If the Availability rate is exceptionally low, determine the causes
8. Customer Survey results	Analyze the Customer Survey results to determine opportunities for improvements specific phone skills that are lacking or needs for procedure changes

Activity 6 - Anonymous Customer Satisfaction Survey - Customers

Details of Activity/Method

A five-question anonymous customer satisfaction survey will be offered to customers at the end of their telephone order. They will have the choice whether or not to complete the survey. The survey is intentionally limited to a small number of questions to encourage participation by customers.

Ranking questions (e.g., on a scale of 1 to 5) will elicit information from customers about their satisfaction with wait time before their calls are answered, their level of satisfaction with the telephone operator interaction (including product knowledge), their level of satisfaction with the customer service supervisor interaction (if applicable), and the likelihood of them placing future orders with PJ.

A final open-ended question will allow customers to record their suggestion(s) for improvement.

Questions to Ask

1. On a scale of 1 to 5, with 1 being the least satisfied and 5 being the most satisfied, how satisfied are you with the speed with which an operator answered your call? Please say the number or press the number on the keypad.

2. On a scale of 1 to 5, with 1 being the least satisfied and 5 being the most satisfied, how satisfied are you with your interaction with the telephone operator? Please say the number or press the number on the keypad.

3. If you spoke with a customer service supervisor, please press #1 now. [This will skip this question for customers to whom it does not apply.] On a scale of 1 to 5, with 1 being the least satisfied and 5 being the most satisfied, how satisfied are you with your interaction with the customer service supervisor? Please say the number or press the number on the keypad.

4. On a scale of 1 to 5, with 1 being the least likely and 5 being the most likely, how likely are you to order with PJ Enterprises in the future? Please say the number or press the number on the keypad.

5. You will now have the option to record your suggestions for how PJ Enterprises can better serve you, the customer. If you would like to end your call now, please disconnect the call and we thank you for your participation in the survey. If you would like to leave a recorded message, please begin speaking after the beep. You may disconnect the call after you have recorded your message.

Activity 7 - IT Infrastructure Interview – IT Manager(s)

Details of Activity/Method

This set of questions will be administered in an interview with the manager(s) in charge of the telephone and computer systems. The open-ended questions will request data on the current telephone and computer systems used, the IT support help available to telephone operators and customer service supervisors, and any issues with the equipment that could affect business processes (e.g., upgrading system could place the telephones or computer systems offline for a brief period and interrupt customer interaction).

Questions to Ask

Telephone System

1. What telephone system is currently in use for telephone orders?
2. When was the last date this system was updated?
3. When are any future updates scheduled for this system?
4. How are updates handled for this system? What time/day are they conducted?
5. Please list any possible effects on business processes due to scheduled updates.
6. What training on the telephone system is provided for operators and supervisors? Which department provides this training? When is this training conducted and how often is it updated?
7. What IT support is provided for telephone operators and customer service supervisors on the telephone system?

Computer System

1. What computer system(s) is currently in use for operators and customer service supervisors?
2. When was the last date this system was updated?
3. When are any future updates scheduled for this system?
4. How are updates handled for this system? What time/day are they conducted?
5. Please list any possible effects on business processes due to scheduled updates.
6. What training on the computer system is provided for operators and supervisors? Which department provides this training? When is this training conducted and how often is it updated?
7. What IT support is provided for telephone operators and customer service supervisors on the computer system?

Activity 8 – Interview - Human Resources Manager(s)

Details of Activity/Method
We will request to interview the Human Resources Manager(s). The information will be used to analyze hiring practices, employee trends and training practices.

A request will be made for all performance evaluations of the customer service supervisors from the last three years to see how they were evaluated, what the results were of their evaluations, and what the process of the review entails

Questions to Ask
1. What type of media is used to advertise job openings?
2. On average, how many applications are received per job opening available?
3. Who is involved in the hiring decision process?
4. Are exit interviews conducted when employees resign their position?
5. What is the ratio of resignations to terminations?
6. What is the organizational structure of the HR Department?
7. How is training delivered to new employees?
8. How long does training last?
9. To what extent are operators trained on merchandise?
10. Is merchandise physically available to employees during training? While they are on the job?
11. Is job training on-going?
12. Is management/supervisor training provided?
13. Are there projected career tracks?
14. How are promotions made?
15. What percentage of employees attend meetings?
16. Were new handbooks provided to all employees?
17. What are the details of the upgraded pension plan?
18. What was the old pension plan?
19. How are employees evaluated?
20. How long have HR department employees been in their current positions? What is your HR experience?

Activity 9 - Interview Catalog Director

Details of Activity/Method

Request to interview the catalog director. Information provided will be used to analyze how product knowledge to disseminated and determine the organizational structure of the department

Questions to Ask

1. Do you have a staff or are you the sole person in this area?
2. Was any research done to back the decision to increase the number of catalogs from three to four?
3. Does Sheena Perez have a staff or is she the sole person in this area?
4. How are trade shows determined/found?
5. Are others involved in the final decision of what items make it to the catalog?
6. What training background or experience do Sheena and Judie have?

Roadblocks & Dependencies

The Roadblocks and Dependencies we will need to consider are:

- Employees may have a fear of candidly talking to outsiders.
- Apprehension from upper management
- Customers may not take the time to complete surveys.
- HR may be resistant to major changes
- Budgetary constraints
- Time constraints

Strategies to Mitigate Risks

- Management needs to communicate the purpose of why ARBO is here.
- Leadership needs to covey a positive message of upcoming changes
- Offer to email surveys to customers so they can complete them at their leisure.
- Provide the HR department with facts and analysis so they can see how the organization will benefit from the change. Develop a WIIFM strategy to present to HR so they develop buy-in.
- Provide PJs with a detailed proposal so that can be customized based on their budgetary needs.
- Create a detailed training plan, include extra time for contingencies.