

Design Document

Training Title: Reservation Clerk Training: Marina @ Selena

Business Goal and Problem	The goal of this training is to standardize the process of completing boat and campground reservations to 100% accuracy in order to ensure customer satisfaction for a perfect vacation. Reservation clerks (and in some cases members of the management team) are not thoroughly assisting customers or accurately completing reservations, thus creating dissatisfied and angry customers. The goal is not currently being met because reservation clerks are not completing all required steps to accurately complete many reservations.
Target Audience	Reservation clerks (new and existing) and the marina management team are the primary learners for this training. All clerks and management have a minimum of a high school diploma. Some have completed or are in the process of completing a college degree. Ages range from early 20's to 60 years old and all fall into the middle class socioeconomic status.
Learning Objectives	<p>Terminal LOs:</p> <ul style="list-style-type: none">• Correctly answer a customer phone call at Marina @ Selena.• Use appropriate questioning to assess customer needs.• Accurately complete a customer reservation. <p>Enabling LOs:</p> <ul style="list-style-type: none">• Reservation clerks must know how to operate the phone system.• Reservation clerks must know details of rental boats and should access and use the watercraft specifications job aid and the campground map job aid, if needed.• Reservation clerks must know how to use the reservation software (Marina Master) and the billing software (QuickFile) and how to complete all required forms for the reservation with 100% accuracy.
Training Recommendation	<p>Delivery Method:</p> <ul style="list-style-type: none">• Articulate Storyline eLearning course <p>Approach:</p> <ul style="list-style-type: none">• Scenario-based learning with performance based assessment
Training	15 - 20 minutes

Time	
Deliverables	<ul style="list-style-type: none"> • Storyboard with script • Job aids • Source file (.story) eLearning course developed in Articulate Storyline with voice over narration • Published SCORM files (.zip) • Job aids listing pontoon boats available and descriptions of each; and campsite map
Training Outline	<ol style="list-style-type: none"> 1. Welcome 2. Navigation 3. Workplace scenario 4. Objectives 5. Assessing customer needs <ol style="list-style-type: none"> a. Phone expectations <ol style="list-style-type: none"> i. Third ring ii. Smile iii. Proper greeting b. Boat rentals/campsite rentals c. Knowledge check 6. Steps 1-4 of reservation process <ol style="list-style-type: none"> a. Step 1: Check reservation board b. Step 2: Collect customer information and create QuickFile account c. Step 3: Sync QuickFile to Marina Master <ol style="list-style-type: none"> i. Sync ii. Boat rental info iii. Campsite rental info d. Step 4: Create invoice in Marina Master e. Knowledge check 7. Steps 5-8 of reservation process <ol style="list-style-type: none"> a. Step 5: Collect credit card information and process payment <ol style="list-style-type: none"> i. Credit card info needed ii. Process payment on credit card machine b. Step 6: Mark invoice as paid in Marina Master c. Step 7: Complete and file reservation card d. Step 8: Confirm all dates and email confirmation 8. Course summary 9. Final graded assessment 10. Conclusion
Assessment Plan	Assessments will reveal that clerks are able to correctly answer customer calls, use appropriate questioning to best assess their needs and provide assistance, and explain the reservation process for boat and campsite rentals.

Level 2 Assessment:

- Two ungraded knowledge checks
- One final quiz
 - 5 graded questions
 - Learner must score 80% or better to pass
 - Scenario-based questions
 - Unlimited attempts given

Level 3 Assessment:

- Observe clerks on the job 1 month after training
- Review completed reservations and saved files on Marina Master and QuickFile to check for accuracy 1 month after training
- Interview reservation clerk manager, Marin, to get her opinion on whether accuracy has improved 1 month after training