The purpose of this document is to capture all business requirements, environmental conditions and job-related information impacting the success of the project. Designers use this document to determine whether or not training interventions are the best approach to solve the business problem at hand. Please refer to the Design Document for any course design documentation.

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| **Project Information** | **Notes** | **Sources** (people, links, etc) |
| Date (MM/DD/YYYY) | 12/15/2020 |  |
| Project Completion Date (MM/DD/YYYY) | 01/02/20121This might be a time crunch, especially considering we don’t have a budget and are still in Analysis phase.  |  |
| Project Name | JTO87R\_Customer Service |  |
| Project Sponsor | Henry Clapt, CEO |  |
| Project Owner | Jack Clapt, HR Manager |  |
| Learning Designer | Jenny Seib |  |
| Stakeholders | HR leaders, org workers, ops managers. |  |
| Business experts and resource specialists | Henry Clapt, Jack Clapt, June Thime (HR Director) |  |
| **Performance Needs** |  |  |
| What is the business need? | In order to increase return customers, company-wide customer service training is needed to improve client/company relationships. |  |
| Why does the business need exist? | Sales have decreased over the last quarter. |  |
| What are the symptoms of the problem or need? | Reduction in return customers. Reduction in overall company sales and ROI.  |  |
| What job titles are affected by this need? | Customer service employees. |  |
| When is the problem or need at its worst? | Primarily at peak sales’ seasons, ie: Christmas, summer, etc.  |  |
| When is the problem or need at its best? | During low economic volume, such as spring and fall. |  |
| How does the need affect the performance of workers? | Workers have reported dissatisfaction with the current customer service training program as being inadequate and boring. |  |
| What tools and systems are involved? | POS systemsLearning Management SystemEmailSharePoint team sites |  |
| How many workers are affected by this need? | Average of 10,000 |  |
| How does this need affect customers? | It will affect customer return rates. Satisfied customers tend to return. |  |
| Where are workers located? | Idaho, California, Oregon, Washington |  |
| Where do workers perform their work? Time frame for instruction?  | At home and in retail settings. Employees will be able to complete the online training in one 2-hour session. |  |
| What is the lowest/highest level of education of workers? | Lowest is high school diploma, highest is Ph.D |  |
| When do workers perform the work needed? | New hires, prior to start. Veteran hires, within two weeks of course launch. |  |
| What’s the average time-to-proficiency rate for the job? | Six months on average for sales and operations. |  |
| What is the budget for the project? | In order to avoid unfinished projects, such as no budget left for evaluation, we need to develop a budget for production.  |  |
| How will we determine the effectiveness of the training?  | Quizzes, surveys, reduction in turnover rates companywide, increased job performance/satisfaction, customer rate of return.In order to prevent repeating the mistakes of the past (inefficient in person training) the end product must have a feature to evaluate not only that learner objectives have been met, but also that learners (new employees) are able to apply their new schema in the workplace which will inevitably lead to less turnover, higher production, and happier customers. |  |
| What is the duration of the training? | One - two sessions, one hour each  |  |
| Type of interactivity? | Interactive, simple branching scenarios. Computer skill set of learners should be taken into consideration so as not to overwhelm the audience. Will need budget constraints and time frame to completion to evaluate best form of interactivity as well. Considering the education of learners ranges from high school grad to PhD, we can probably assume sufficient computer skills to justify higher-level interactions.  |  |

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| **Recommendation** | **Training or Performance Support?** | **Rationale** |
|  | Performance support | Worker interviews report that resources are needed sporadically and some of the information provided during onboarding is not relevant or needed on a daily basis.  |
| **Proposed Strategy** | **Methodology** | **Resources Needed** |
| Multimedia library of essential resources | Video and web pages | SharePoint siteVideo editing softwareCustomer service surveys |