Training Evaluation: Customer Service and Online Technology

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The purpose of this document is to outline an evaluation process for the "Customer Engagement: iPad Training" module. This evaluation process is to be used to provide summative information describing the effectiveness of the training module after the module has been conducted. Specifically, at the end of the training course, this evaluation process will be used to determine the extent to which participants are able to:

1. State or write out the three "end of transaction" phrases to say to customers after they choose to use online ordering
2. State three alternative resources that can be used for customer problem solving
3. Be able to use the iPad search function to determine the online availability of three randomly chosen products and whether the product is in-store or online order only.
4. Use one of three customer problem solving strategies to address a corresponding service failure situation

3 to 6 months after the workshop, this evaluation process will be used to determine the extent to which participants are able to:

1. State or write out the three "end of transaction" phrases to say to customers after they choose to use online ordering
2. State three alternative resources that can be used for customer problem solving
3. Be able to use the iPad search function to determine the availability of any customer sought product and whether the product is in-store or online order only.
4. Use any of the three customer problem solving strategies to address a corresponding service failure situation
5. Increase the average number of customer email addresses collected by the local store to at least 42 per week for six months.
6. Maintain or increase a ratio of ten new online order users for every one unsatisfied or disgruntled customer per week

This evaluation document contains three evaluation tools to measure participant learning post training, an explanation of the training's expected impact on organizational results, and a description of the analytical processes that can be used to determine the significance of the training's impact on those organizational results. These tools are based on meta-analysis research on Kirkpatrick's four levels of effective training evaluation (Alliger, et al., 1997).

Participant Reactions to Training

Customer Engagement: iPad Training

Participant name:_____ Date of training:_____

Facilitator name:_____ Sponsoring Store:_____

Manager on shift:_____

This form is to be completed by the participant listed above at the end of the training session. Information will be used to assess the overall impact of the training on the participant's learning and job effectiveness.

Questions:

1. How relevant overall was the training session to your job? (1=not relevant at all; 7=completely relevant)

   1 2 3 4 5 6 7

2. To what extent will the training be useful to you during your next shift? (1=not confident; 4=somewhat confident; 7=completely confident)

   1 2 3 4 5 6 7

3. To what extent will the training be useful to you during your next week at work? (1=not confident; 4=somewhat confident; 7=completely confident)

   1 2 3 4 5 6 7

4. If you could change one thing about the training session to make it more relevant to your job, what would it be?

_____

_____

_____

_____

Participant Learning from Training

Customer Engagement: iPad Training

Participant name:_____ Date of training:_____

Facilitator name:_____ Sponsoring Store:_____

Manager on shift:_____

This form is to be completed by the participant listed above and the facilitator listed above at the end of the training session. Information will be used to assess the overall impact of the training on the participant's learning and job effectiveness.

Questions for participant:

1. What are the three "end of transaction" phrases to say to customers after they choose to use online ordering?
    a. "_____."
    b. "_____."
    c. "_____."
2. What are three alternative resources that can be used for customer problem solving?
    a. _____
    b. _____
    c. _____

Questions for facilitator:

3. How many stickers did participant receive in their workbook for successfully using iPad search function to find 3 randomly chosen items and determine their availability? _____
4. How many customer problem-solving strategies did you observe participant use correctly to address a corresponding service failure during training? _____(Out of three)

Participant performance post-training

Customer Engagement: iPad Training

Participant name:_____ Date of observation:_____

Manager observing:_____ Store:_____

This form is to be completed by the manager listed above 10 to 20 weeks after the participant listed above has completed training.

Questions:

1. Which of the following "end of transaction" statements have you observed the participant use **today or within the last week of work**? (circle all that apply)
    a. "Thank you for purchasing with us. The front cashier will check you out."
    b. "I'm sorry we couldn't find the right product. Is there anything else I can help you with?"
    c. "Well, I'll be around if you have any questions."
2. Ask the participant to list, from memory, three alternative resources they can use for customer problem-solving. Circle all that they answer: **AS400** **Manager** **Telzon**
3. Which of the following problem-solving strategies have you observed the participant appropriately use **today or within the last week of work**? (circle all that apply)
    a. Work with customer to clarify needs, but give an appropriate amount of space
    b. Focus on problem-solving rather than addressing customers' negative emotions
    c. Inform customer they can use Walgreens.com at home if they like
4. How many unsatisfied customers did the participant have week before training?_____
5. How many unsatisfied customers has the participant had in the last week?_____
6. How many **new online order users** did the participant obtain a week before training? _____
7. How many **new online order users** did the customer obtain today?_____Last week? _____

Participant impact on organizational results

Using this evaluation process, the company will be able to track two organizational level results: increased number of email obtained and ratio of new online order users to unsatisfied or disgruntled customers. Each time a participant uses the iPad to place an online order, the system

will prompt the customer to list an email address to which they would like their order receipt sent. New users will need to enter their email for the first time to complete an order. Maintaining a high ratio of new emails obtained to unsatisfied customers will help keep sales high by retaining customer intentions to repurchase from the same company and by enabling greater advertising reach for the company via the new customer emails.

Analysis

As a part of the evaluation process, an analysis will be conducted on each learning, performance, and results objectives to determine the significance of the training module's effectiveness. Each objective will be evaluated using an appropriate measurement tool, an appropriate cutoff score determining satisfactory results, and an appropriate statistics test for the objectives that have data to be compared against. These items are described below followed by a list of results that are expected to occur.

Participant Reactions

Alliger and colleagues (1997) suggest that participant reactions that center on the extent to which they felt training was practical and job relevant are strong predictors of learning and transfer of learning to the workplace. As such, it is valuable to measure such reactions in order help the company predict how well training will impact a participant's performance after the training both short term and long term. The "participant reactions to training" evaluation form will be used in order to measure these reactions. An average cutoff score of five for each item on the form will be used to determine the effectiveness of the training to ensure a high rate of transfer. It is expected that average scores will be a five or higher for reactions and that they will relate positively to immediate learning and transfer of learning as training material includes encounters with real customers in a setting identical to what participants will see on the job.

End of Transaction Statements

Item one from the "participant learning from training" and from the "participant's performance post-training" forms will be used to evaluate participant's learning and transfer of

the three “end of transaction” statements. Specifically, the number of correct answers on each form will be measured with a cutoff score of 2.5 out of 3 possible. This cutoff score is set to ensure that a large number of transactions with customers end positively according to the company’s current service rules for professionalism. This service rule compliance will help reduce customer sabotage behaviors by employees in the face of customer abuse against employees (Wang et al., 2011). Use a repeated-measures t-test to compare scores between forms in order to compare changes in participant performance between the end of the training session and 10-20 weeks after the training session. Significant negative results from such a t-test will indicate ineffective long-term performance of training material and serve as grounds for reassessing the training module. Non-significant results are expected and would indicate an effective retention so long as cutoff scores are met.

Alternative Resources

Use similar measures, cutoff scores, statistical analysis, and expected results to evaluate learning and transfer of the three “alternative resources” for customer problem solving. These scores will be measured using number of correct answers for item two on each form and cutoff values are place also at a 2.5 out of 3 to ensure effective organization initiated problem-solving behaviors by participants (Liao, 2007).

iPad Search Function

Measuring a participant’s ability to use the iPad effectively will be done directly using item three from the “participant learning from training” form and indirectly using items six and seven of the “participant’s performance post-training”. Cutoff scores for the direct measure will be set at three items found during training as mastery of the iPad search function is imperative to obtain an online order. Indirect measure cutoff is set at three new orders per week for item seven only to indicate sustained long-term performance as evidenced by participant’s ability to make sales on shift using the system 10 to 20 weeks after the training. A paired-sample t-test will be

used to ensure positive significant differences between items six and seven to indicate sustained long-term performance as is expected.

Problem-solving Strategies

Item four from the “participant learning from training” form and item three from the “participant’s performance post-training” form will be used to measure a participant’s ability to use customer problem-solving strategies. A cutoff score of two out of three will be used to determine effective learning during training and effective performance post training. This score is expected of each participate and is set high due the importance of an individual’s ability to effectively address disgruntled customer, but to perfect levels as it is possible that a given participant will not encounter all three customer types in a given week post training. A repeated-measures t-test will be used to compare scores during training and 10 to 20 weeks after training for non-negative significance to indicate sustained or improved long-term performance.

New Emails Obtained

Items six and seven of the “participant’s performance post-training” form will be used to indirectly determine changes in average number of email addresses obtained each shift. On an individual level, cutoff scores are set at two new emails per day as initial subject matter expert (SME) interviews revealed an obtainment rate of one or two new emails per shift and the minimum measurable increase for an individual is one to two more. On an organizational level, the cutoff score will be 42 new emails per store per week, which is the expected amount of increase. This is two emails obtained per individual per day assuming three individual iPad users are on shift per day for a store open seven days per week. A repeated-measures t-test can be used to compare scores from items six and seven to indicate increase in email obtainment from before the training session to 10 to 20 week after the session.

Ratio of New Orders to Unsatisfied Customers

Finally, a ratio of scores from items four and six on the “participant’s performance post-training” form can be compared to the ratio of scores from items five and seven in order to

determine the number of new emails obtained per unsatisfied customers per week. Cutoff scores for the latter ratio are ten to one, which is the expectation for a given employee. When combined with strict measures of new emails obtained per week, this measure will ensure that a minimal number of customers are unsatisfied, which indicates an effective individual level problem-solving ability. As mentioned, this will lead to higher rates of customer repurchase intentions (Liao, 2007). A repeated-measures t-test can be used to compare ratios to determine if there is a significant increase in this ratio between the week prior to training and 10 to 20 weeks after training.

References

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