

Performance Improvement Initiative  
Amanda Hodges  
MIT 502  
July 27, 2006

Table Of Contents

Executive Summary.....3  
Perception Analysis.....4  
Performance Analysis.....5  
Gap Analysis.....8  
Intervention Recommendations.....10  
Feasibility Analysis of Interventions.....13  
Evaluation Plan.....15  
Appendix A (Intervention Characteristics Chart).....17  
Appendix B (Feasibility Decision Matrix).....18

## Executive Summary

One of southeastern North Carolina's sales units for a national corporation has seen decreased sales over the past two fiscal quarters. Currently, sales are down 15% over the half way mark for the year and 30% since this time during the last fiscal year. The unit independent sales consultants are seeing a lack of personal profit due to these circumstances and the team leaders and sales directors are experiencing a decrease in commission and sales. As they began the first quarter of the current fiscal year, many team leaders and unit directors felt that something needs to be done in order to increase both individual and unit sales resulting in overall increased revenue for the independent consultants, unit directors, and the corporation as a whole. The sales unit is overseen by a national sales director with smaller "unit directors" who oversee "team leaders" who lead teams of two or more independent salespeople. Recruitment of new salespeople has been high over the last two quarters of the fiscal year but sales have continued to decrease despite incentive challenges and awards begin offered by directors at all levels.

The unit is showing a 40% gap their projected goals for this time of the year vs. their actual production profit. If they continue to see a 30% a year decrease they will lose any significant profit margin within three years and be forced to either merge with a more successful unit or disband and allow the consultants to find their own new sales unit or find another career. Therefore, the company stands to lose over \$300,000 a year in profit over and above the individual profit to the consultants and directors for each year that this unit is below sales goals.

The intervention strategies that are recommended for this performance improvement initiative include providing demonstrations of sales presentations, providing practice scenarios for new consultants, offering attendance incentives for weekly meetings, providing mentors for new consultants, increasing communication through listservs and conference calls, having novice consultants share success stories at meetings, and making more internet referrals to new consultants. These risks for these interventions were analyzed and risk management techniques are recommended to keep the project on track. The interventions will be put into place beginning on September 4, 2006. If the intervention strategies are successful then the unit should be on target by the start of the fourth fiscal quarter of the 2006-2007 year.

Formative as well as summative evaluation measures including surveys, interviews, observations, and performance reviews will be used to assess the effectiveness of the interventions at different stages of the implementation. This evaluation plan will allow the designers as well as the organization to ensure that the program is meeting the needs and matching the vision of the organization and put the unit back on target for the 2006-2007 fiscal year and all proceeding years.

## Perception Analysis

One of southeastern North Carolina's sales units for a national corporation has seen decreased sales in the third and fourth quarter of the past fiscal year. As they began the first quarter of the current fiscal year many team leaders and unit directors feel that something needs to be done in order to increase both individual and unit sales resulting in overall increased revenue for the independent consultants, unit directors, and the corporation as a whole. The sales unit is overseen by a national sales director with smaller "unit directors" who oversee "team leaders" who lead teams of two or more independent salespeople. Recruitment of new salespeople has been high over the last two quarters of the fiscal year but sales have continued to decrease despite incentive challenges and awards begin offered by directors at all levels. Individual sales consultants are responsible for making sales presentations, marketing products to their customers, finding new customers, and providing restock for existing customers.

At the current time, sales are down 15% from the second quarter of the last fiscal year and are 30% lower than this same time last fiscal year. Scheduled sales presentations are down and overall wholesale ordering is down due to lack of sales. As a result, the unit has not received performance incentives for the last two quarters and will most likely not make target sales for this fiscal quarter. Previously this unit was one of the highest grossing sales units in the state. The directors feel that low sales will slow recruitment of new sales consultants and result in even lower sales figures in the future.

The sponsors of this initiative are the National Sales Directors and the Unit Sales Directors. They want the operation to be on target for their quarterly sales and restock as well as earn incentives. They see the problem as being an issue with the sales consultants' presentation schedule and effectiveness. Essentially, they believe if the consultants would schedule more presentations and sell more effectively at the presentations then sales would not be decreasing. However, they are unsure of why the schedules are slow. The champions of this initiative are the Unit Sales Directors and Team Leaders. They are more personally involved in the operation than the National Sales Directors because they work with the consultants on a day to day basis. They will help implement any interventions that are chosen and they see the issue in a similar light. They feel that increased sales schedules will increase sales but they believe support from higher level directors is lacking. Finally, all these groups as well as the Independent Sales Consultants are stakeholders in the initiative because they all want to see increased profit both personally and within the company as well as incentive recognition from the national corporation. All groups are willing to participate in any suggested interventions as long as they align with the mission, vision, and values of the company and their sales unit.

Discovering the true source of the performance problem will require different forms of data collection. Surveys, interviews, and observation will be used to determine the core issues related to the performance problem and decide what courses of action will be taken to improve performance and thus improve profit and sales recognition.

## **Performance Analysis**

After conducting a perception analysis for the sales organization, the findings indicate that most members of the company feel that the deficiency in sales is related to the number of sales presentations being given by independent consultants and that this comes as a result of not having enough support from the management, specifically national sales directors.

A performance analysis was conducted using surveys and then follow-up interviews with the independent sales consultants, clients, team leaders, unit sales directors, and the area national sales director. Observations were also made during weekly staff meetings. The following are the results of the analysis of the major systems.

### ***Organizational Systems***

#### **Actual Performance**

Currently, the southeastern North Carolina sales unit is experiencing a significant decrease in their sales production over the second half of the fiscal year. Sales are down 15% over the half way mark and 30% since this time during the last fiscal year. The unit independent sales consultants are seeing a lack of personal profit due to these circumstances and the team leaders and sales directors are experiencing a decrease in commission and sales.

Communication among team members is constant and comes in many forms. At this time the unit and national sales directors send out monthly newsletters containing important information about new products and upcoming product “challenges” which encourage consultants to sell specific products to their customers to earn rewards. Additionally, weekly or bi-weekly emails are sent out by the sales directors and the national headquarters with encouraging stories, sales pointers, and ideas for working the business. Sales Consultants emphasized how much they value this communication but that often it gets them excited about the products and sales but they are unsure of how to implement the program or go get the customers.

The clients are women and men who need skin care and cosmetic products and are looking for a product outside of the drug store or department store. They usually want a more personalized product for their needs and want individuality in the marketing so they feel pampered and well taken care of by their consultants.

Additionally, the sales consultant base is constantly growing as more consultants are recruited and join the sales team. However, many of these new consultants are not beginning to sell until well after they have joined the sales team and often drop out after only a few months. The profit margin for these new consultants is minimal and they sometimes admit feeling they are in over their heads.

#### **Optimal Performance**

In the ideal situation sales should be up 10% over last fiscal year at this time. That goal is set by the company each year and this unit strives to meet that goal every year to earn incentives and rewards. The consultants should be holding 1-2 sales presentations each week depending on their income goals and they should be seeing a profit turnover of 50% on a monthly or bi-monthly basis. Wholesale orders to the company should be at a minimum of \$200 each month from each consultant as well.

Communication should not only be frequent and motivating but it should also provide guidance for the consultants in how to implement the new sales ideas and “challenges” using both written, verbal, and demonstration techniques for encouraging application of the ideas into practice.

New clients should be found on a regular basis by consultants through conversation, sales presentations, and acquaintances who can refer them. These contacts should result in increased sales presentation bookings as well as increased sales with repeat sales due to the replenishment nature of the product. Consultants should feel confident in making their sales presentations and talking about the products and their strengths.

## **Management Systems**

### **Actual Performance**

When a new sales consultant joins the sales team, their recruiter, team leader, and sales director meet with them to discuss the direction they want to take their business and how they can begin their sales presentations by ordering initial inventory, setting up sales presentations, and making contacts with new clients. They are given literature, DVD training videos, and business guides to refer to and use as training tools. Occasionally, consultants are encouraged to attend other people’s presentations to observe their method and style of sales. Little follow up is made with some consultants and they due very few shows. Some new consultants report having only this initial contact with their directors and feeling that they are left to fend for themselves.

Decisions about the individual businesses are made by the independent consultants under consultation from the sales directors and team leaders. Because there are no sales quotas, sales are encouraged based on individual goals. The consultants like this method of sales because they can work the hours that they need to in order to reach their personal profit goals. However, at this time they are not making the profit they need to because they are not able to find new customers or book enough parties even though the sales directors and even some consultants know there are clients out there. The consultants feel that they do not know how to communicate effectively with the customers.

### **Optimal Performance**

According to interviews with the national sales director and unit sales directors, each new consultant should have a strong support system in place that provides not only initial contact with the directors and consultant, but also provides a lasting framework for them throughout their first few months as a consultant. They should feel welcome to visit other consultant’s presentations, have their team leader or director conduct demo presentations for them, and be able to discuss any concerns with the upper level sales staff as needed. The literature and DVD training should be used as introductions to the concepts and as follow-up reference tools. Leaders and directors should also be advising consultants as to where they can look for new clients and helping make referrals from their sales presentation to the consultants under them.

## **Physical and Technical Systems**

### **Actual Performance**

Because the consultants work in an outside sales organization there is no actual work environment that they are all part of on a daily basis. They each have their own work environment at home or in an area of their personal space that they can set up as they feel is best for their business. Additionally, they all have varying levels of technology available to them in their homes or work spaces. Everyone does, however, have access to a computer with internet and the same sales guides and tools that everyone else has including the business guides, product guides, and DVDs. Some consultants do report distractions in their homes prevent them from spending as much time on their business as they would like to on a daily or weekly basis.

### **Optimal Performance**

Ideally, according to the literature and information provided by the directors, each consultant should have a space specifically set aside for storing their inventory, working on sales presentations, and other needs related to their business. This area should be free of other distractions and should be accessible to them on a daily basis for them to work. Time should be set aside each day where they can work on their business and make sales presentations when scheduled without other distractions just as they would in an office environment.

## **Human and Social Systems**

### **Actual Performance**

The culture among all member of the organization is friendly and upbeat. Observations made at weekly staff meetings indicated that all sales staff seemed at ease with each other. New consultants were introduced and allowed to introduce themselves if they wanted and then “classes” were conducted on sales presentations, bookings, making contacts, etc. depending on the theme of the meeting. Incentives were also given at the meetings for consultants who showed growth in their business or who had participated in the sales “challenges” the company had been running the previous month or week. Interview with consultants indicate that they enjoy these meetings because of the social and business aspects but do not feel like enough emphasis is placed on practicing the concepts that they are learning in the meetings. They want more opportunities to put the skills and knowledge into use in a controlled setting. Consultants are encouraged to share positive tips and experiences with one another but new consultants are often overwhelmed with highly successful consultants stories and rarely hear from another new consultant about what they have done recently and how they have improved.

### **Optimal Performance**

Ideally, the sales consultants should continue to keep the camaraderie and friendly environment that they have developed at weekly meetings. They are at ease with each other personally and this will have a positive effect on how they view their job. However, more application opportunities need to be given for the new consultants in

practicing what they have learned in a safe or less risky environment than a sales presentation. Perhaps allowing them to practice their sales pitch on more experienced consultants would afford them a more confident approach to their own outside presentations. Likewise, while the consultants are motivated by the “challenges” from the company, they need to be coached in setting their own personal goals for the day, week, or month and working towards those goals as part of a larger goal. Finally, consultants should have the opportunity to hear stories not only from directors and other experienced sales staff but also from younger, less experienced sales consultants as well.

## Gap Analysis

After conducting both a perception analysis and a performance analysis multiple gaps were found in the way the company is operating related to the problem of decreased sales. The following chart outlines these gaps and what is lacking at each level.

<b>Actual</b>	<b>Optimal</b>	<b>Gap</b>
Sales down 30% since same time last year	Sales up 10% since same time last year	40% difference in sales production
Communication given through newsletters, emails, and weekly meetings	Communication given in varying formats as well as demonstrations and practice environment provided	Consultants are not given demonstrations of the sales techniques and product uses and are not given opportunities to practice the new skills in a safe environment
New consultants are not beginning to sell as soon as they join and are often leaving after only a few months	New consultants should hold their first sales presentations within the first two weeks and remain an active member of the sales staff for as long as they are meeting their goals	New consultants are waiting to hold sales presentations and turnover rate for consultants is higher than desired
Clients who have been with the company are bringing repeat sales but very few new clients are coming on board	Repeat clients should be valued as well as new clients found to increase profit base	New clients are not being reached at the level that is desired
New consultants are provided training through literature, DVDs, initial meetings with directors, and business guides for planning their business and maintaining inventory	New consultants receive training through current methods as well as receive follow-up support from directors and team leaders on an ongoing and personal basis	Follow-up support is not adequately provided to new consultants beyond getting started and ordering inventory



New consultants find it hard to find clients to make sales or book sales presentations with	New consultants should receive new clients through referrals and opportunities aided by their directors	New consultants are not being referred to new clients
Everyone sets up their own personal space for work in their home most often. All consultants have computers	Consultants should have a professional work environment that is free of distractions for at least the daily work time they plan each day	Some consultants do not have a distraction free work area in their home
Consultants attend weekly meetings and hear presentations about new products and sales techniques	Consultants attend weekly meetings and hear presentations about new products and sales techniques and then practice them in a risk free environment	No safe practice for new skills and knowledge is provided for consultants
Consultants are provided with goals and “challenges” set up by the company	Consultants should have goals set by the company as well as their own personal goals for sales based on their profit goals	Consultants need help in setting their own personal goals in addition to company “challenges”
New consultants hear motivational sales stories from directors and team leaders	New consultants hear stories from other new consultants who are successful early on as well as directors and team leaders	Consultants are not hearing smaller success stories from other new consultants

Based on the performance gaps at all four levels of the system the company is currently seeing a 40% difference in their projected goals for this time of the year vs. their actual production profit. If they continue to see a 30% a year decrease they will lose any significant profit margin within three years and be forced to either merge with a more successful unit or disband and allow the consultants to find their own new sales unit or find another career. This would negatively effect the independent consultants because they are not making any money off a business that they have often invested their life savings into, the directors will lose their commissions off the consultant sales, and the national company will take a major financial loss because over the past three years this unit has been the highest grossing unit in the state of North Carolina. Therefore, the company stands to lose over \$300,000 a year in profit over and above the individual profit to the consultants and directors for each year that this unit is below sales goals.

## **Intervention Recommendations**

After reviewing the results of the perceptual analysis, performance analysis, and gap analysis, seven interventions have been developed to address the issue of decreased sales over the past fiscal quarter. In order to have a successful restructuring of the sales consultant team and move sales forward toward their goals, the unit must accept and implement these strategies at all levels of the organization in a positive way. (Appendix A breaks down the characteristics of each intervention.)

### **1) Providing demonstrations of appropriate sales presentations and booking techniques**

This intervention would provide an opportunity for new consultants to see what they are already receiving training in. At this time all training and instruction in these areas occurs in an informal setting at weekly business meetings or through individual sessions with their team leader or director. By using demonstrations at weekly meetings, the new consultants will see increased understanding of the techniques and feel more comfortable with the concept. This solution uses a team approach to utilize experts within each unit to help train new consultants as well as aligning with the organization's mission to help one another succeed.

**Timeline:** Demonstrations will begin at the September 4, 2006, business meeting. Demonstrations will then be held on the first, third, and fifth Mondays of every month beginning 30 minutes prior to the business meeting and again for 30 minutes after the conclusion of the meeting.

### **2) Provide “safe” opportunities for new consultants to practice sales presentations and role play booking dialogues**

This intervention like the first is designed to provide more in depth training than is currently being provided. By giving consultants a risk free environment to practice their presentations and dialogues they are increasing the participants' comfort levels with the material and their own style of presentation.

**Timeline:** Practice classes will be held on the second and fourth Monday of each month both thirty minutes prior to and thirty minutes following the regular business meeting beginning September 11, 2006.

### **3) Provide incentives to attend weekly business meetings**

Often new consultants are nervous about attending the weekly business meetings. Because they are their own boss they are not required to attend but much of the initial training and mentoring occurs at these weekly meetings. Having them attend will increase comfort level with concepts that are discussed as well as give directors and team leaders' insight into weekly success. Although, these incentives will at times require monetary investment, they are one of the few goals that will cost the company

or the directors anything out of pocket, therefore, the cost is minimized by implementing other very cost sensitive interventions as well.

**Timeline:** Beginning with the September 4, 2006, business meeting, consultants will receive incentives for attending each business meeting. The incentives will be at the digression of the team leaders and directors depending on their unit's preferences. Beginning in October a monthly attendance incentive will be offered providing incentives for those consultants that attend an entire month's meetings. In December, the directors and team leaders will meet to discuss a proposed attendance plan for 2007 that has weekly, monthly, and quarterly incentives.

#### **4) Provide mentors for setting "work time" goals**

Because most consultants work in their home they do not always have a distinct work space and work time. Providing a mentor that can coach them in setting appropriate goals for time on task will allow the consultants to focus more on their work than on distractions at home. Incentives can be offered based on how well the consultants meet their goals

**Timeline:** In September 2006, the directors will work with team leaders and experienced consultants to establish a group of mentors who will work with new consultants on establishing work environments and the topics that they might cover when working with their mentee. The mentors will be assigned to a new consultant (3 months or less) beginning October 1<sup>st</sup>. They will serve as a work mentor for 1-2 months as needed and then be a reference as needed for the new consultants.

#### **5) Increase the number of new and novice consultants speaking to groups at the weekly meeting**

This intervention will allow new consultants to hear stories from others in the same situation they face and hear success stories from early in people's careers. This intervention is easily sustainable and provides a powerful forum where new consultants can see the strategies they have been learning in action.

**Timeline:** September 4, 2006, announce that the unit is looking for new or novice consultants to speak at weekly meetings concerning their difficulties and/or success with the company. They may sign-up with their team leader or the unit director to share at a future meeting. In addition, team leaders and unit directors may approach new and/or novice consultants about discussing their story. The new and/or novice consultants will begin speaking during their first 15 minutes of every weekly meeting starting on September 11, 2006. Based on amount of interest this will occur as often as a consultant is available.

#### **6) Establish communication channels for better director, consultant, team leader interactions including weekly conference calls, email listserv, and scheduled individual follow-ups with directors and consultants.**

These communication channels are relatively easy to set up and maintain at the management and organization levels and will increase new consultants comfort not only with new concepts but also with colleagues. In addition, this intervention is easy to maintain and implement because it can be easily maintained by one or two people, thus limiting the amount of people involved and increasing the feeling of ownership that those individuals have in maintaining the program.

**Timeline:** Weekly conference calls with the unit director will begin October 1, 2006, and continue once a week through December at which time the impact will be evaluated and changes or additions will be made to the program. The national sales director for the southeastern NC area will set up an email listserv that she will maintain with the help of her area unit directors. The listserv will go online beginning October 1, 2006 as well. Individual follow-ups will be scheduled by team leaders and directors based on the needs and schedules of their consultants.

#### **7) Referrals are made to new consultants from company website**

This intervention would be easy to implement because it only involves reprogramming the database of consultants to select consultants based on period of employment rather than random selection. This would allow the majority of new customer referrals to go to new consultants before referrals are made to older consultants. Once the system is reset this would be sustainable with only periodic updates needing to be made as consultants gain larger customer bases. In addition, the program can be set up to switch consultants out when they enroll a certain number of customers in their preferred customer lists. For the most part the directors and team leaders are very supportive of this intervention; however, some more experienced consultants feel that it would take customers away from them when new clients visit the website. After a trial period this intervention will be reviewed to ensure no consultant is missing out on some internet referrals.

**Timeline:** The southeastern regional office will be contacted by the national sales director by September 15, 2006 to set up the specific requirements for referral. Initially, each new consultant will be allowed three web referrals before being moved down the list. Every fourth referral will be made to experienced consultants. The southeast regional office should make the changes to their database before October 15, 2006. At the start of the 3<sup>rd</sup> fiscal quarter in January, the results of customer referrals will be reviewed and the database reset if necessary.

## **Feasibility Analysis**

After conducting a perception analysis, performance analysis, gap analysis, and developing possible intervention strategies for the Southeastern NC sales unit; a feasibility analysis was conducted in order to assess the likely success of the strategies. In conducting this analysis it was found that most of the strategies have a high probability for success and those with lower probability can be addressed using risk management techniques.

Implementing all of the intervention strategies successfully will result in this sales unit being on target for their sales goals by the end of the third fiscal quarter in March 2007. However, in order for this to occur the risks must be addressed from the beginning and any opposition to the project must be handled in an appropriate and positive manner.

The most risky intervention, according to the feasibility decision matrix in Appendix B is a program designed to forward the initial web referrals to new consultants before sending referrals to more experienced consultants. Some of the concerns within this intervention include the cost effectiveness because the regional office will need to be involved and databases will need to be updated as well as opposition from more experienced consultants who may initially receive fewer referrals. Additionally, there is a risk that this may be a complicated intervention that requires more extensive time to perfect. In order to address these issues the national sales director will be in constant communication with the regional office and keep them informed of changes and needs of the program. A schedule for implementation will be established between the director and regional office for specific implementation dates as well. Finally, once the system is set up it will make referrals at specific intervals to experienced consultants so as not to prevent them from receiving web referrals.

The introduction of a mentor system is also a somewhat risky intervention because it requires the commitment of time and effort from multiple individuals within the organization. Issues related to acceptance and commitment are the most weighty within this strategy and will only be solved through follow-up from management and using strategies to encourage commitment from those consultants who volunteer to be mentors. Likewise, the increased communication channels require a commitment from management to maintain and update the listservs and conference calls. This will only be addressed by a standing follow through on the part of the directors in charge of these activities.

While attendance incentives poses a small risk due to the upfront costs of offering incentives, it is believed that this intervention along with the others will be easily implemented and maintained because they fit with activities already occurring within the unit and simply take current practice and extend it to new areas of the organization. Consultants regularly model techniques for each other but not necessarily in a controlled environment with time for practice encouraged and while incentives for sales are offered at every meeting they have not yet used them for attendance. These strategies will be successful within this organization.

## **Implementation Costs and Resource Needs**

The implementation of these strategies will have a minimal cost to the organization. The demonstrations and practice sessions as well as the mentor system and novice speaker inclusion will have no cost to the organization or workers because they are events that already occur but not on a regular basis. All materials and resources are currently available but are not being used in a formal environment. The only resource needed is the experienced consultants willing to model and mentor.

The attendance incentives cost will be minimal. Currently, incentives are offered at every meeting for increased sales performance, new bookings, and other sales related issues. The items used as incentives are additional products for use in sales, Section (business resource) items, office supplies, and verbal recognition. Similar techniques can be utilized for attendance at minimal cost to the organization. Directors may choose incentives based on their financial discretion.

The majority of the cost for this project will come from the increased communication channels and the changes to the consultant referral database. Adding a conference call will require the director to set up a conference call system with call-in capabilities. Systems similar to this are available for as little as \$10.95 a call or \$34.95 a month. Because they are planning to use this weekly, it is more financially sound to choose the monthly program. The cost to set up a listserv is nothing because it can be done through the director's company email server. Similarly, the cost to change the referral database is more than other interventions because of the time needed to make the changes but the changes can be made through the southeastern regional office. The only requirement is that the unit pays a \$30.00 processing fee to the company for the changes.

The resources needed to successfully implement the intervention strategies are mostly available in house and at minimal cost. Experienced consultants, team leaders, and directors will be needed for demonstrations, practice classes, and mentors. Likewise, directors will be needed to maintain conference calls and listservs as well as work with the regional office to coordinate the database. Material incentives will be needed for the attendance program a conference call system will need to be purchased to facilitate weekly calls. Finally, novice consultants who are willing to speak about their sales experiences are needed as well.

## **Evaluation Plan**

### ***Formative Evaluation***

This performance improvement initiative will be tested through a formative evaluation process that will include periodic checks using surveys of consultants, team leaders, and unit directors as well as one on one interviews as needed to assess the success of the situation. Additionally, observations of weekly meetings will be conducted at random unannounced intervals to check for the use of incentive strategies and demonstration/practice sessions. The evaluator will also listen in on two or three conference calls during the fall and monitor the listserv periodically for success and implementation.

### ***Summative Evaluation***

The summative evaluation for this intervention process will be geared toward assessing the increase in sales profit over the first three quarters of the 2006-2007 fiscal year compared to the final two quarters of the 2005-2006 fiscal year. The assessment should show a 40% increase in individual profits for independent sales consultants.

## **Data Collection Plan**

### ***Description of Data Collection Methods and Instruments***

Data will be collected during the introduction of the interventions through observation and surveys. These give the performance technologist an indication of the participant's success at each level of the intervention and help identify any areas that may need to be changed or modified for further success. Surveys will be conducted with a random selection of the unit following demonstrations, conference calls, and practice sessions to assess their reactions and perceived learning. Observations of later presentations of new consultants will also be observed. Unit and individual sales data at the end of each quarter will also be recorded for increases or decreases as well as overall gains at the end of the third quarter.

### ***Types of Data to Be Collected***

Both quantitative and qualitative data will be collected for this summative evaluation. The observations of participants and surveys will provide qualitative data concerning the effectiveness of the interventions both on increased client base and increased sales. Quantitative data will also be collected from sales figures and surveys. These two types of data will provide information regarding all aspects of program including sales performance, booking increases, participants' reaction to the interventions, and the application of interventions in their practice.

### ***Techniques to Ensure Validity and Reliability of the Instruments***

To ensure validity of the instruments, they will be reviewed by the performance technologist as well as the team leaders, unit directors, and national sales director to ensure that the intervention program meets the standards for the company vision and mission as well as aligns with the priorities of the local organizational unit. Additionally, they will ensure that the evaluation instruments effectively measure improvements in need areas as identified in the perception, performance, and gap analyses. This will aid in establishing a high inter-rater reliability.

### **Data Analysis Plan**

#### ***Description of Analysis Methods***

The data will be analyzed using multiple techniques. Quantitative data will be compiled using the SPSS statistics analysis program. Multiple frequency distributions will be conducted to show results from the participant surveys results. Additionally, qualitative data will be analyzed in narrative form and categorized by subject and relevance to stakeholders.

#### **Description of How Findings will be Interpreted**

Findings will be interpreted to be used for making any changes to the intervention plan as needed for the formative evaluation and used to make changes as needed during the subsequent fiscal periods. The findings from this summative evaluation will allow the designers to add or remove any aspects of the intervention program that are needed and design a more effective product based on the needs of the consultants and unit.

#### **Reporting Findings**

Findings will be reported to the unit director and national sales director. Team leaders will be informed by their director as to what the findings are. The designer will also recommend any changes that he/she feels need to be made to the program based on the findings and how they are interpreted. The findings will be submitted in a summative evaluation report with both raw data and data analysis documentation attached.



Appendix A

<u>Intervention</u> Spitzer's Principles	1. Demonstrations	2. "Safe" practice	3. Attendance Incentives	4. Mentors	5. Novice Speakers	6. Increased Communication	7. Referrals
Comprehensive understanding of situation	+	+	+	+	+	+	+
Carefully targeted	+	+	+	+	+	+	+
Sponsor-based and supported	+	+	+	+	+	+	0
Team approach	+	+	+	+	+	+	+
Cost sensitive	+	+	0	+	+	+	+
Align with organizational priorities	+	+	+	+	+	+	+
Well-investigated	+	+	+	+	+	+	+
Powerful	+	+	+	+	+	+	+
Sustainable	+	+	+	+	+	+	+
Take implementation into consideration	+	+	+	+	+	+	+
Iterative approach to design, development, and implementation	+	+	+	+	+	+	+

## Appendix B

	Provide demonstrations			Provide "safe" practice			Attendance Incentives			Mentor system			Novice speakers at meetings			Increased communication channels			Increased new consultant referrals		
	R	W	RI	R	W	RI	R	W	RI	R	W	RI	R	W	RI	R	W	RI	R	W	RI
Cost effectiveness	1	1	1	1	1	1	2	5	10	1	1	2	1	2	4	2	1	2	2	5	10
Strength of support	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	2	1	2
Organizational change impact	1	1	1	1	1	1	1	1	1	2	1	2	1	1	1	2	1	2	2	5	10
Barriers to implementation	1	1	1	1	1	1	2	1	2	2	5	10	1	1	1	2	1	2	2	10	20
# steps to implementation	1	1	1	1	1	1	2	5	10	2	5	10	1	1	1	2	5	10	2	5	10
Available resources	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
Dependency on time/urgency	1	5	5	1	5	5	1	1	1	2	5	10	1	1	1	2	5	10	3	5	15
# sites/functions affected	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
# people/groups affected	1	1	1	1	1	1	1	1	1	2	1	2	1	1	1	2	1	2	3	1	3
<b>Total</b>			<b>13</b>			<b>13</b>			<b>28</b>			<b>39</b>			<b>12</b>			<b>31</b>			<b>72</b>
<b>Legend</b>																					
R = Risk	Highly desirable/low risk = 1						Moderately desirable/moderate risk = 2						Not desired/high risk = 3								
W = Risk Weight	High importance or value = 1						Moderate importance or value = 5						Low importance or value = 10								
RI = Risk Index	RI = R x W (1 = optimal)																				