



**Strengthening employee skill level and knowledge
of the online ordering in-store pickup system**

Prepared by the MIT team of:

Kristine Rose
Nik Smith-Hunnicut
Duane Thomas

May 5, 2006

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Executive Summary

Tech Town is a national electronics retailer with locations in forty-seven states that has been in business since 1949. On an average day, Tech Town's 600 stores can process over 700,000 transactions and more than double that amount on holiday weekends. They also have a growing Internet business that is currently 5% of their company sales but continues to grow every day.

Recent results of Customer Satisfaction survey results have been down, so representatives from the Customer Service Department have picked out the top complaints and reviewed the records of the online order/in-store pick up system for these customers. Their findings showed that 40% of orders that are processed online are not ready to be picked up by the customer in thirty minutes. Tech Town has mandated that this rating must return to their original goal of 90% efficiency within four months.

Training is provided before the employee begins working; however, most employees still do not understand the "order-online-for-in-store-pickup" process. This lack of quality training is causing confusion as well as strained relationships among the employees in the store and in the warehouse. Additionally, the stores are losing money, customers are unhappy with the way the stores are handling their orders and therefore taking their business elsewhere, and the turnover rate for employees has reached a new high.

A team of instructional designers has prepared this proposal after conducting quantitative and qualitative analysis in the form of observations and interviews of employees and customers. Our front-end analysis reveals that the most effective solution would be to lengthen the current training period and place instructional training material online. An analysis of possible solutions to Tech Town's current performance problem indicates that the chosen method of addressing this issue will provide employees with a more thorough and in depth understanding of the policies and procedures for the in-store merchandise pickup option.

This proposal has been designed to describe the cause of the problem and our rationale for the proposed solution. Included in this proposal are the necessary phases and tasks needed to complete a reconfiguration of training procedures. At the conclusion of this proposal please find a detailed appendix that includes the tasks, phases, staffing requirements, and necessary budget. This proposal's goal is to raise the current 40% in-store pick up proficiency rating to the benchmark of 90%.

Problem Statement

Tech Town is a national electronic retailer serving forty-seven states with an annual sales volume of \$10.3 billion. Open since 1949, Tech Town's 600 stores process over 700,000 transactions on an average day during the year and more than double that during the holiday weekends. Each store has one store manager, one operations manager, between forty and sixty sales counselors, and between ten and fifteen cashiers. Tech Town also has a growing internet business that currently contributes to 5% of the companies sales and growing.

Recently the customer service department of Tech Town has been deluged with phone calls, e-mails, and in-person complaints regarding their order-online pick-up in-person option. Specifically the complaints have centered on Tech Town's inability to have the merchandise ready for the customer to pick up thirty minutes after it is ordered through the company's web site. Customer service representatives have identified the top complaints and have gone to the proper individuals in the quality control department to review the records of the order/pick-up section of sales reports. Their findings reveal that 40% of the orders that are processed online are not ready to be picked up by the customer in thirty minutes. This rate is far below the companies projected goal of having 90% efficiency using this system.

Tech Town's management is concerned that if online order processing does not improve, ramifications could include a loss of repeat customers, decreased sales revenue, and diminished employee job satisfaction. It is because of Tech Town's commitment to providing excellent customer service that the managers have taken the initiative to actively correct this problem.

Proposed Solution and Rationale

The most effective solution for closing the performance gap at Tech Town, as revealed by the front-end analysis, is the implementation of a weeklong training program and an online proficiency test. This is necessary to address the low efficiency of the in-store pickup system.

A team of instructional designers, content experts, and evaluation specialists will be convened to accomplish this solution. Besides this core team, various contractors will be hired as needed to design and develop instructional products, oversee with formative and summative evaluation, and provide content expertise. Both the Sales managers and Operations manager will be active participants in the design and development process to insure the feasibility and usability of the training products.

The designed training program will focus on solid computer-based instruction and relevant adult learning theory. Store and operations managers will receive a training session to familiarize them with the new computer-based training. Once they have completed this training, they will serve as guides to assist new employees with completing the computer-based training. Along with the computer-based training, new employees will receive a supplementary student guide that highlights the main points of the training plan.

The content of the online training module will include the correct process and procedures of how the in-store pickup system works. Employees will receive an in-depth understanding of the system from start to finish. They will also learn how to efficiently process orders and prepare them for customer pick up. The training will be divided into generalized training on the in-store pickup system and also more specialized training depending on their job responsibilities. Throughout the weeklong training, role-play will be used to provide a real world element and authentic training scenario. Certain new employees will be asked to play the role of a customer who is placed an online order for in-store pickup. Other employees will perform their expected job duties.

Upon completion of training, all employees will have their acquired knowledge and skills assessed by a standardized computer-based test. The first portion of the test will cover the in-store pick up system and the last portion will test job specific knowledge that will be based on the employees expected responsibilities. All employees must pass with a 90% competency rating in order to move on to their job duties in the store. If the employee does not receive this

score, they will repeat whatever area or areas they failed to reach the minimal benchmark score on.

The advantages of utilizing computer-based training are multifaceted. The online training module offers the promise for more positive outcomes with the least amount of risk. The space requirements for computer-based learning are much less demanding and Tech Town already had the existing hardware and infrastructure available in their stores. Due to these reasons, Tech Town has decided to switch from instructor-led training to a computer-based training program. The computer-based training offers the option for the employee to complete it at their own pace. In the past with instructor-led training, many employees would fall behind. Due to the fact that the training group was so large, the instructor could not stop and repeat materials already covered, therefore employees would have to skip certain sections in order to catch up. This led to learning deficiencies, which translated into poor work performance, employee frustration, and customer dissatisfaction.

To insure a high level of customer service quality, a proficiency test has been placed into the training program. In the successful completion of this proficiency test ensures that employees have the entire job related skills and knowledge they will need to work in the store. When this training was delivered before, without a proficiency test, employees were allowed onto the sales floor without evidence Tech Town relevant job skills.

Products

Instructor's Guide

The instructor's guide will contain three sections, which will include the front-end materials, instructional content, and instructional materials. The front-end materials will include a table of contents, a "how to use this guide section," an overview of the content and instructional procedures for the training, a logistics section which will include training space requirements, enrollment limits and time requirements, a section-by-section listing of all necessary equipment needed to teach the course, materials or references which should be read before teaching the course, a glossary of important terms, and a bibliography of necessary references.

The instructional content section will include information about delivering the content. Each topic will begin with a list of objectives, a listing of all necessary equipment, a detailed

description of necessary procedures for the instructor, and the estimated time for each topic and activity. Tips on how to effectively lecture and encourage discussion and participation in role-playing activities will be included.

The instructional materials section will include a copy of the student guide, copies of all student handouts, copies of any background reading for the instructor on content, operating procedures or teaching procedures, and any other reference sources. Information about how to adapt this training for employees with disabilities will also be included in this section.

Student Guide

The student guide will be divided into two sections: front-end materials and lesson material. The front-end materials section will include a table of contents with page numbers and section titles, and a “how to use this guide” section which describes the justification for dividing the guide into sections and suggests how to use the guide most effectively. There will also be an overview section which describes what the course will be about and how the employees are expected to pay attention and use the information covered in their jobs every day. At the end of this section, a glossary will be included to provide quick reference for employees.

The lesson material section will clearly describe how each student is to carry out the lessons and topics of the training. Each topic will include objectives, a list of important materials, time considerations, step-by-step directions on how to complete the activities in the lesson, and embedded self-testing materials so the employee can make sure they are understanding the material.

Instructional Materials

Assessment Packet

The assessment packet will be prepared by a assessment specialist to ensure the assessments properly address the stated training objectives determined in the planning meeting. The packet will include assessments to be completed at the conclusion of each topic. Surveys will also be included to help conduct the summative evaluation.

Role Play Bank

The role play bank will contain a variety of scenarios grouped by topic. This bank will be used to provide authentic training scenarios for employees in training. This bank will be developed with strong input from the content experts.

Job Aid

A laminated job, the size of a credit card will be developed and given to trainees to consult should they have questions while they are on the job. The topic of the job aid is the procedure for in-store pickup of online orders.

Awareness Materials

For new employees a flyer containing information on the training will be included with the official offer of employment. These flyers will explain the location of the training, the purpose of the training and the fact that the training is required of all employees. Existing employees will receive the training flyer in their paycheck envelope and will be required to attend the training within the following month.

Certificate

After successful completion of the computer-based exit assessment each employee will receive a certificate stating their name and date of completion.

Formative Evaluation Packet

The formative evaluation packet will include the instructor's guide and assessment materials. This will be developed early to so it can be tested out in a one-on-one setting as well as by medium sized groups. The surveys to be used in the formative evaluation will also be included.

Summative Evaluation Packet

The summative evaluation packet will contain all instructional materials, as well as the computer-based competency test. Surveys completed by recently trained employees will also be included. An independent evaluation specialist will conduct the summative evaluation and will report their findings to the store, operations, and sales managers.

Phases of the Project

Phase 1

Project Planning

Flowchart: Plan Project, Hold Project Planning Meeting, Create a Rough Draft of Project Development Plan, Development Plan Reviewed and Approved by Store Manager

Team Members

- Instructional Designer 1
- Instructional Designer 2
- Instructional Designer 3
- Project Manager
- Content Expert (Sales Manager)
- Secretary
- Content Expert (Operations Manager)
- Technical Writer
- Store Manager

The initial phase of this project will begin with a team members meeting designed to inform them of the existing problem that Tech Town has been facing regarding the in-store pickup system. Team members will be reminded of how important Tech Town's customer service policies are for the company's growth. The members will decide on the most beneficial way to bring the current method of handling online orders up to the standards that are in concordance with the customer service policies that they have built their reputation as a leader in offering technology based merchandise. At the conclusion of this meeting the team member secretary will create a report of the results of the meeting and make a report that will be sent to team members electronically so they can review the meetings content. Once a draft of the project development plan is created, the store manager will review it and approve it so that the content planning phase can commence.

Phase 2

Content Planning

Flowchart: Plan content, Hold Content Planning Meeting, Complete Content and Task Analysis, Prepare Objectives, Plan Rough Draft of Materials

Team Members

- Instructional Designer 1

- Instructional Designer 2
- Instructional Designer 3
- Content Expert (Operations Manager)
- Content Expert (Sales Manager)
- Graphic Designer
- Trainer
- Secretary

In the content planning phase the instructional designers, secretary, sales manager and the operations manager will hold a meeting to begin mapping out the content for the instructional materials. The specific job duties of these individuals will entail that the sales manager and operations manager review the current training processes. In addition they will also gather any paper based material that has been utilized in past training to guide ensure that critical content is transferred to the new method of training. The instructional designers will be responsible for taking the content from past training and defining which portions need to be amended, deleted, or expanded. Upon completing this process the instructional designers will be able to define the deliverables that will need to be implemented.

Instructional designer 2 will then complete a task and content analysis to make sure that all areas of the training package are thoroughly represented. The completion of both the task and content analysis phase will be followed by instructional designer 3 writing the learning objectives. Next the content experts will review the learning objectives for feasibility. Once the objectives have been finalized, a rough draft containing the deliverables will be drafted.

Phase 3

Product Development

Flowchart: Develop Assessments, Develop Instructor's Guide, Develop Student Guide, Design Instructional Materials

- Assessment Specialist
- Instructional Designer 1
- Instructional Designer 2
- Instructional Designer 3
- Graphic Designer
- Technical Writer
- CBI Developer
- Project Manager

Creation of the product will demand that all team members lend their cooperation, knowledge and expertise to producing a product that achieves the predetermined objectives. The duty of creating the assessment items will be handled by the assessment specialist. The assessment specialist will amass the content that will be used to create the assessment items by reviewing the final objectives and the rough draft instructional materials report.

The design team, (instructional designer 1, graphic designer and technical writer) will take the assessment items and begin developing the instructor's guide which will contain information on how to effectively operate the chosen medium of instruction. While the product being developed is a computer based training module that does not require intervention from an actual instructor, the instructors guide will be a supplemental aid to help the members of management better understand how the needs of the store have been addressed within the context of the module.

The manual will include front-end analysis material along with a description of the module it supports. All of the materials, equipment, and resources that are needed to properly implement the training system as well as how these resources should be obtained or used will be in this section. Following the front-end analysis content will be the printed copy of each of the module screens that will be available to be accessed. This inclusion will allow managers to easily reference materials that may need to be examined. The second section will also contain a written description of terminology that is important to the knowledge of employees of Tech Town. Content within this section will also include video still images of footage that will detail how employees will handle online orders.

Employees will also have a guide designed for them to refer to when they have questions concerning how they should approach the learning module. The users guide will also include front-end material. Accompanying the front-end material will be a narrative on how the user should actually use the manual and a glossary with all of the terms that users will need to know in order to achieve mastery of the material being presented. Stated goals and objectives for each section within the training module will also be included within this section. The second portion of the users manual will be devoted to detailing the purpose of the training in addition to an explanation of how the training process will be carried out. Completion of both the instructor and user manuals will jumpstart the process of creating the instructional materials that will become the computer-based module.

Phase 4

Workshop Logistics and Awareness Materials

Flowchart

Plan workshop, Reserve Training Room, Reserve Necessary Presentation Equipment, Develop Awareness Materials, Review Awareness Materials, and Implement Awareness Materials

Team Members

- Instructional Designer 1
- Instructional Designer 2
- Instructional Designer 3
- Graphic Designer
- Secretary
- Marketing Specialist
- Technical Writer
- Store Manager

The secretary will be responsible for reserving the training room and the necessary equipment. The secretary will also notify individuals of the appropriate time and place the workshop will be conducted and assure that the necessary refreshments, learning materials and other necessary items are in place. Other duties that will be handled by the secretary will include making sure that all necessary equipment that will be used during the workshop is in its required place and in necessary order as well as making copies of any handouts and supplemental aids that will be used during the workshop. The construction and disbursement of the awareness training materials will involve the secretary along with the graphic designer who will make flyers announcing the subject, time, date, location, and duration of the workshop that will be posted in the areas designated for employees and management in addition to sending the same content via email in pdf format to members of the team.

The instructional designer 1 along with the technical writer and the store manager will meet to go over the awareness materials and make sure that all items are clearly represented in detail. Once this step is completed all of the invited individuals will meet at the predetermined time and the instructional designer along with the store manager will present the plan to the group concerning the plan that has been undertaken to improve the current performance of the in store pick up policy.

Phase 5

Product Drafts

Complete First Draft of Deliverables, Edit for Content, Edit for Grammar, Revise Draft of Deliverables

Team Members

- Content Expert (Operations Manager)
- Content Expert (Sales Manager)
- Technical Writer
- Instructional Designer 1
- Instructional Designer 2
- Instructional Designer 3
- Project Manager

The first step to completing this phase requires that all of the member assigned to the team for this particular phase review edit and come to a consensus concerning an initial draft of the deliverables. The specific portions of this first draft will consist of the instructor and user guides. Upon a full review of the first draft members of the team will give their suggestions to the lead instructional technologist (instructional designer 1) and along with the two content experts they will review the material and transform it into what will be the second deliverables draft. The tech writer will then check the document for errors, make corrections as they are needed and then submit the draft back to the rest of the team members who will then review the document and agree upon a finalized version of the deliverables.

Phase 6

Formative Evaluation

Flowchart: Plan Formative Evaluation, Conduct Formative Evaluation of training materials

Team Members

- Instructional Designer 1
- Instructional Designer 2
- Instructional Designer 3
- Project Manager
- Evaluation Specialist
- Secretary

Phase six of the project starts with the project manager, the evaluation specialist, instructional designer 2, and the secretary planning the administration of the formative evaluation. This process calls for the planning of one-on-one and small group evaluations to determine the feasibility and appropriateness of the deliverables on the users. Instructional designer 3 and the evaluation specialist will be in charge of the actual formative evaluation. A

one-on-one evaluation will be conducted with the operations manager and both sales managers while a small group of six to eight employees will be selected at random to participate in the small group trial. Once the formative evaluation is conducted, instructional designer 3 and the evaluation specialist will evaluate the results of the impact of the training materials on the users.

Phase 7

Train the Trainers

Flowchart: Train the Trainers, Implement Training, Complete Training, Conduct formative evaluation on training the trainers

Team Members

- Trainer 1
- Trainer 2
- Sales Managers (Trainers A and B)
- Operations Manager (Trainer C)
- Instructional Designer 3
- Evaluation Specialist
- Project Manager
- Training Consultant

The next phase in the project is to hold a workshop so that the trainers (Sales managers and operations manager) can be trained. This is to ensure that they are able to take the materials previously developed to hold their own training sessions for new employees in the future. Following initial training, training will then be implemented and completed for the sales managers and operations manager. Instructional designer 3, evaluation specialist, and the training consultant will conduct a formative evaluation to see how well the trainers have been trained. Once this process has been reviewed, the sales managers and operations managers will have all the knowledge needed to hold their own trainings for new employees and will begin to do so.

Phase 8

Summative Evaluation

Flowchart: Plan Summative Evaluation, Conduct Summative Evaluation, Compile Summative Evaluation Data, Prepare Summative Evaluation Report, Submit Summative Evaluation Report, Review Summative Evaluation Report

Team Members

- Evaluation specialist
- Instructional Designer 3
- Project Manager
- Secretary
- Technical Writer
- Store Manager

The final phase of this project's development is to plan and conduct the summative evaluation. Instructional designer 3 and the evaluation specialist will be in charge of putting together the best resources and determining the format of the evaluation that is to be conducted. They, along with the project manager, will conduct the actual evaluation. There will be two phases of the summative evaluation; phase one consists of evaluating the way that the trainers have been trained. This will be completed after a few training sessions have been held for new employees by the sales managers and the operations manager. The second phase of the summative evaluation will determine the overall solution of the problem.

The next step is to compile the data from the summative evaluation and type up a report on the findings. The evaluation specialist and the project manager will be in charge of gathering and compiling the data while the technical writer will take care of creating, typing, and finalizing the summative evaluation report. Once the report is completed, it will then be submitted to the Store manager by the project manager for review.

Appendices

Appendix A: Flow chart and Appendix B: Gantt Chart-See attached file

Appendix C: Staffing Plan

Staffing members and Duty descriptions

The list below contains the descriptions and duties of the members of the design and development teams in charge of creating the instructional product, training the trainers' and conducting formative and summative evaluations of the project in which Tech Town will train their new employees to understand the in-store pick up system more clearly and be able to give customers the service that their company stands behind.

Project Manager

The project manager is in charge of the entire Tech Town project. He oversees that all the staff are doing the jobs they have been hired to do and makes sure that the different phases of the project are completed in time and also done correctly. The project manager is experienced in electronic business practices and has some knowledge in the areas of instructional design.

Store Manager

The store manager is in charge of running the Tech Town store and also oversees the duties of all other employees hired at the store. For this project, his main duties are to review and approving the project development plan, reviewing and implementing the awareness activities, reviewing the summative evaluation report, and scheduling training for the new employees. The store manager is a full-time employee.

Operations Manager

The operations manager is in charge of the store's staffing and system operation as well as putting together training for new employees. For this project, his main duties are to contribute to the project development plan, help develop the content for the new training, review the rough draft of content and deliverables, and attend training in order to learn the new materials for employee training. The operations manager is a full-time employee.

Sales Manager

For this project, the sales managers are in charge of contributing to the development and content planning, review the rough draft of content and deliverables, and to attend training in order to learn the new materials for employee training. Both sales managers are full-time employees.

Instructional Designer 1

Instructional Designer 1 has experience in Instructional Systems Design and computer-based training. This individual serves as the lead instructional designer for this project and their duties include participating in the project planning meeting, conducting a content and task analysis, planning rough draft materials, designing the instructor manual, reviewing the awareness materials, and revising the deliverables. Instructional designer 1 is a full-time employee.

Instructional Designer 2

Instructional Designer 2 has experience in Instructional Systems Design and also in conducting formative and summative evaluations. This individual's duties for the project include participating in the project planning meeting, conducting a content and task analysis, planning rough draft materials, reviewing and implementing awareness materials, and planning the formative evaluations. Instructional Designer 2 is a full-time employee.

Instructional Designer 3

Instructional Designer 3 has experience in Instructional Systems Design and also in conducting formative and summative evaluations. This individual's duties for the project include participating in the project planning meeting, conducting a content and task analysis, planning rough draft materials, reviewing and implementing awareness materials, and conducting the formative evaluations.

CBI Developer

The CBI developer has experience in designing and developing computer-based training for businesses. This individual's duties for the project include reviewing the content and developing the computer-based training that will be used for Tech Town's new employees. The CBI developer is a part-time employee.

Graphic Designer

The graphic designer has experience in graphic design and implementing them into instructional materials. This individual's duties for the project include content planning, designing graphics for the instructor manuals, designing instructional materials, and developing awareness materials. The Graphic Designer is a full-time employee.

Secretary

The Secretary carries out administrative and clerical duties related to the project. She will report directly to the Project Manager to receive assignments. This person is responsible for compiling minutes of meetings, arranging for workshop time and space, reserving presentation

equipment, distributing awareness materials, printing instructional materials, and help in compiling the data for the formative and summative evaluations. The secretary is a full-time employee.

Technical Writer

The Technical writer has experience in writing and editing instructional materials, especially for business and industry. Their main duties include creating a rough draft of the development plan, developing the instructor manual, designing the instructional materials, grammar editing, preparing the formative and summative evaluation reports, and developing the awareness materials. The technical writer is a full-time employee.

Assessment Specialist

The assessment specialist has experience in developing and conducting instructional assessments. Their main duties will be to create assessment items that will be used. The assessment specialist is a full-time employee.

Evaluation Specialist

The evaluation specialist is an expert in conducting evaluations of instructional design programs. The responsibilities include planning, conducting, and compiling both the formative and summative evaluations. The evaluation specialist is a full-time employee.

Marketing Specialist

The marketing specialist is an expert in business content and training, especially in the area of sales. His main duties for the project include helping develop and review awareness materials and to contribute to which presentation materials should be used. The marketing specialist is a full-time employee.

Training Consultant

The training consultant is an expert in training and conducting employee training. This individual will help the two trainers run the training for the Sales and Operation managers in order to be able to train new employees in the future. They will also help conduct a formative evaluation on the train the trainers. The training consultant is a full-time employee.

Trainer 1

Trainer 1 is an expert in business employee training. Their main duty for the project is to conduct the train the trainers training for Tech Town. Trainer 1 is a full-time employee.

Trainer 2

Trainer 2 is also an expert in business employee training. They along with Trainer 1 will help conduct the train the trainers training for Tech Town. Trainer 2 is a full-time employee.

Appendix D: Budget

Position	Hourly Wage	Total Hours	Total Individual Cost
Instructional Designer 1	\$35.00	226.22	\$7,919.70
Instructional Designer 2	\$35.00	297.52	\$10,413.20
Instructional Designer 3	\$35.00	248.4	\$9,954
Project Manager	\$45.00	232.78	\$10,475.1
Content Expert (Sales)	\$35.00	40	\$1,400
Secretary	\$10.00	87.5	\$875
Content Expert (Operations)	\$35.00	40	\$1,400
Store Manager	\$55.00	12	\$660
Technical Writer	\$35	235.68	\$8,143.80
Training Consultant	\$35	20	\$700
Graphic Designer	\$30	198	\$5,940
Assessment Specialist	\$50	24	\$1,200
CBI Developer	\$35	112	\$3,920
Marketing Specialist	\$30	18	\$540
Evaluation Specialist	\$50	133.33	\$6,666.50
Trainer 1	\$25	88	\$2,200
Trainer 2	\$25	88	\$2,200
Trainer 3	\$25	88	\$2,200
Total Payroll Expenditure			\$76,807.30