ONBOARDING TRAINING PLAN:
CUSTOMER SERVICE REPRESENTATIVE

Overview

The following Training Plan is intended to be a starting point in designing and developing a successful training program for trainers responsible for onboarding new and existing customer service employees.

Most notably, this plan reshapes the current customer satisfaction position into a customer service representative role. The included job description was created and revised using data collected from current and former customer satisfaction representatives, client surveys, client interviews and feedback, and input from members of the management team, and outlines the needs, objectives, and expectation requisite of this new position.

Customer service representatives must successfully meet the objectives defined by the curriculum described in this plan before interfacing autonomously with clients. This will be achieved through the use of prescribed exercises, mentoring from a subject matter expert (SME), continuous feedback from the management team, achievement of key performance indicators (KPIs) outlined in the course, teach-backs, and supplemental instruction as needed.

Predicted outcomes of an effective client issue resolution by a certified customer service representative include consistent and successful education of appropriate solutions to client inquiry through role-based education of the company's clients. Clients will receive uniform and complete instruction by all customer service representatives, resulting in a holistic understanding of how to appropriately use our product based on their roles and use cases.

Client training will be conducted using WebEx conferences, checklists, written task-based documentation produced under the direction of a SME by the technical writing team, and workshops. Details for client support will be outlined in a separate training plan.

A customer service representative must successfully meet the objectives defined by the curriculum described in this plan before being placed in a client-facing environment to work independently.

The efficacy of this training will be measured using feedback from management, peers, and client satisfaction surveys.

1 INTRODUCTION

The sections that follow provide a comprehensive training plan for customer service representatives who work directly with clients.

1.1 Background and Scope

This training is intended to provide customer service representatives with a detailed understanding of our company's solutions, enabling them to educate clients to successfully use our solution in their workplace environment.

The scope of this 12-week training includes:

- 1 week-long HR onboarding process as prescribed and directed by the director of Human Resources, including pairing with a SME who will serve as coach throughout the customer service representative training process.

- A detailed checklist describing each exercise in the order by which they must be completed to move forward with the training.
- 1 week-long, top-level overview of our company's history and products outside of our solution (such as products clients use currently).
- 1 week-long, top-level overview of the client's departmental structure and personas, including job roles and workflows.
- 4 weeks of detailed training for our product including autonomous learning modules (LMS - budget permitting), shadowing, and assessments.
- 4 weeks of detailed training for legacy products we still support and are in use by our clients. This training segment will include autonomous learning modules, shadowing, and assessments as well as half-day shadowing sessions with a seasoned customer service representative using an assessment worksheet provided by the trainer.
- 1 week of shadowing by the mentor or other SME using an assessment worksheet provided by the trainer and trainee teach-backs.
- Weekly status check-ins with the department director, as well as the manager of the customer service representative team.
- Successful completion of assessments and a comprehensive teach-back presentation to certify the customer service representative as a SME who can train new and existing client clients to successfully use our product.

1.2 Points of Contact

The following table provides the organization name (code) and title of key points of contact for onboarding, training, and development:

Name	**Title**	**Email**
Vanessa Schill	Instructional Designer	vanessaschill@company.com
(Name)	SME/Coach	(Email)
(Name)	Director	(Email)
(Name)	Manager	(Email)

1.3 Document Organization

The customer service representative training plan includes all of the following:

- Pretest to gauge the learner's level of aptitude prior to the training. Attitudinal questions may also be included for employees transitioning into the role from within the company and used for both pre- and post-test purposes and by Human Resources where appropriate to affect changes as appropriate/necessary.
- Checklist to assist the customer service representative maintain focus and complete all areas of training as prescribed in the training plan; this may change based on manager, coach, and learner feedback (both informal and in knowledge check assessments throughout the training) to ensure desired training results are achieved and a certification is earned.
- List of contacts to include the trainer, coach, director, SMEs, and others.

- Checklist to use during SME and peer shadowing - this can be reviewed during meetings with support staff to address any questions or clarify points and ensure all learner needs are met consistently and thoroughly.
- Job aids as created and provided by SMEs, documentation team, and trainer to be used as prescribed during training and on the job post-certification for continued education and support. Includes workflows, decision matrices, scripts, and commonly-used industry terminology. Note: These may not apply to all learners; those transitioning into the role from within the company may already be familiar with some of the terms and workflows. The schedule and checklist can be adjusted to fit the learner, and is scalable.

1.4 Project References

The project references include any items the customer service representative may use during call shadowing, autonomous learning activities, certification preparation, and support/continuing education once certified. The structure of this is to be determined; if the company is able to digitize and provide access to these references on an internal server this will help eliminate any version control or duplication issues that may arise.

1.5 Glossary

The following table provides commonly-used terms, titles, and acronyms used during and after client onboarding training and development:

Term/title/acronym	Definition
Clients	A person or company using our products.
Customer Service Representative	**Customer Service Representative** is the subject matter expert (SME) responsible for responding swiftly and accurately to client inquiries, driving client satisfaction and success.
Teach-back	The teach-back method, also called the "show-me" method, is a communication confirmation method used to confirm whether a trainee understands what is being explained to them. If a trainee understands, they are able to "teach-back" the information accurately.

2 INSTRUCTIONAL ANALYSIS

Instructional Analysis and Course Development covers needs assessment, data collection and analysis techniques, and the development of effective instructional courses and programs using fundamental adult learning theories.
Initial analysis was conducted using pre- and post-testing as well as one-on-one interviews with the existing customer satisfaction team. The results of the analysis are included in this plan. Notably, the two common attitudes held by the existing CS team are the need for better communication and mutual trust between CSRs and the client services management team, as well as the need for key performance indicators (KPIs) to gauge the success and guide improvement of CSRs by the management team.

In response to this, a new job description, the customer service representative, was created and includes KPIs created by the instructional designer that are heavily informed by members of the CS management team. The updated job description is included with this plan. Further, these issues will be addressed as the instructional designer works closely with SMEs, members of the management team, and clients to identify necessary or overlooked job requirements, as well as identify the knowledge and skills needed to meet those requirements (i.e., what the target learners do to meet performance expectations). Business drivers will be discussed. Target audience characteristics will be identified. Collaboratively, SMEs and the instructional designer will identify a training goal and training learning outcomes based on organizational needs and job requirements of the clients. With the framework established, a panel that includes senior management, technical writers, and SMEs will determine what the client audience needs to know in order to perform successfully on the job. For every learning outcome, supporting knowledge documentation will be identified and created.. Led by the instructional designer, the panel will then brainstorm instructional strategies for presenting and practicing content, as well as evaluating the current customer support representatives' mastery of the course content.

2.1 Development Approach

This section discusses the approach used to develop the course curriculum and ensure quality training products, the methodology used to analyze training requirements in terms of performance objectives, and to develop course objectives that ensure appropriate instruction for customer service representatives.

NOTE The topics or subjects on which the training must be conducted will be identified and outlined by senior leadership in the department as well as the manager of customer service, a representative from the technical documentation team, and other SMEs identified as having intimate knowledge of the products and services. The outline will be presented to the instructional designer to synthesize into appropriate training methodologies and exercises as part of the training development process, and a recommendation will be returned to the group for consideration and possible implementation.

2.2 Issues and Recommendations

Any current and foreseeable issues surrounding training will be included in this section if and when they arise, as well as recommendations for resolving each issue. Budget and time constraints will also be documented and discussed with management and SMEs prior to reaching a resolution.

2.3 Needs and Skills Analysis

Through gap analysis and interviews,as well as careful scrutiny of the analytics returned from the current team's services, it has been determined that the following skills are necessary to achieve, maintain, and build success in this role:

Previous experience and success in a customer service role.

Communication and soft skills, including phone etiquette and professionalism.

Critical thinking and analytical skills to predict potential or emergent problems and address them with the client to avoid the need for additional customer contact and displeasure with the product.

Recall and pattern recognition, and drive to learn new ways of thinking about complex problems and how to solve them. Ability to apply solutions to similar problems for optimal outcomes in performance and client satisfaction.

Patience and empathy with the clients and other employees in the company.

Accuracy in information provided to clients to avoid call drivers and frustration.

Excitement about the company, mission, goals, and satisfying the clients. Puts the client's needs first to ensure optimal outcomes and satisfies KPI goals.

3 INSTRUCTIONAL METHODS

3.1 Training Methodology

Given business drivers, a target audience profile and learning outcomes, the instructional designer will decide how to best deliver the training. As it stands, initial inquiry and observation suggest a blended learning approach as outlined above, using ADDIE, VARK, and possibly SAM methodologies delivered using classroom training, web conference training/distance learning, LMS-based training SME coaching, and frequent assessment tools such as knowledge checks and gamification strategies.. TheSMEs, in collaboration with the instructional designer, will break content into smaller segments (such as lessons or modules) and estimate the total course duration. Taking into consideration the company goals, client needs, and meeting targets in KPIs, these sessions should be brief, concise, and take no longer than 90 days to complete and conduct a scenario-based assessment to certify the customer support representative. Further, any decisions made by the instructional designer and supporting SMEs will be documented in a project definition document used to create a statement of work (SOW) for the course development/content team as is the industry standard for course development as return on investment (ROI) is largely considered. For this, the Kirkpatrick and Philips methodologies may be beneficial to incorporate into the training solution. Opportunities for asynchronous online training will be considered, along with information about using a learning management system (LMS) to manage training efforts and certification. Again, cost (both time and fiduciary) must be taken into consideration when developing a digital learning development approach.

3.2 Training Database

In partnership with the developers and SMEs, a training database created to allow customer service representatives to work through job-based scenarios would be beneficial for recall and optimal performance. This will also enable SMEs to observe and suggest alternative workflows and show customer service representatives how to apply decisioning matrices and job aids to the problem to reach a satisfactory and viable solution to mock issues from clients prior to certification.

3.3 Testing and Evaluation

A pretest composed of soft skills, attitudinal, and technical aptitude-based questions will enable the instructional designer, coaches, and managers to develop individualized learning programs for customer service representatives, leading to a potential increase in job satisfaction and lower churn, or turnover, in the position (these can be costly to the company and should be taken into consideration when addressing ROI). Frequent knowledge checks throughout the training program allow the instructional designer, coaches, and managers to spot gaps and inconsistencies early on in the learning process and correct for these issues, increasing the probability of optimal and desired learning outcomes. To maintain quality training and help ensure the customer service representative has the appropriate guidance and job aids necessary to be successful in both the certification process and on the job when interfacing with the clients, frequent temperature checks should be taken by the coaches, and workflows scrutinized. Utilization of the Socratic method is helpful in these scenarios, as it drives critical thinking behavior necessary for success in the position pre- and post-certification. The course should be scalable and easily modifiable to continue to capture learner engagement and interest.