Entelechy's Newsletter for Trainers, Managers, HR Professionals and Others Responsible for the Performance of Others

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A BRIEF MESSAGE FROM THE PRESIDENT

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Dear Reader,

Another year is coming to a close and I want to thank you for your readership and your fellowship. Training is a wonderful profession. The people who are attracted to our profession are people who want to make a difference in others' lives. Trainers are genuinely concerned and helpful.

This is the season for reflection and thanksgiving. I am truly thankful for the ability to help others and for the people – you – I call my colleagues.

I wish you the best of the season and a prosperous 2003.

Terence Traut, President of Entelechy, Inc.

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DESIGN AND DEVELOPMENT SHORTCUTS – LEARNER ANALYSIS

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First the way it SHOULD be done and then the shortcuts!

INTRODUCTION

The first phase of the ADDIE instructional design model is Analysis (followed by Design, Develop, Implement, and Evaluate). The steps in the Analysis phase include:

- Conduct a performance assessment
- Determine goals
- Conduct a learner analysis
- Conduct a resource analysis
- Determine the likely delivery systems
- Create an Analysis Summary

We covered Conduct a Performance Assessment and Determine Goals in previous issues of *The Key* (http://unlockit.com/thekey.htm). We'll look at Conduct a Learner Analysis in this issue.

LEARNER ANALYSIS

One of the tasks that you will complete during the Analysis phase is to conduct a learner analysis. The data that you collect will impact decisions throughout the Instructional Systems Design (ISD) process from influencing your recommendation of the appropriate training delivery vehicle to helping you select appropriate learning strategies in the Design phase of the process.

Identification of Learner Group(s): The first step is to identify the group or groups of learners who will participate in the training.

Characteristics: Next, describe the general characteristics of the learner group such as:

- Average age
- Gender distribution

- Average level of education
- Cultural makeup

Numbers: Consider the following when determining the number of learners to be trained:

- Total numbers of learners to be trained
- Number of different audience groups per class
- Number of learners per class

Location: The location where training will take place should be determined.

Experience Level: The experience level of the learners should be determined relative to the training knowledge and skills that will be acquired. Determine what the learner already knows and can do before he or she participates in the training.

Attitude: It is valuable to discover the attitude of the learner participant. Are they willing participants or are they required to attend the training?

Skills Related to Delivery Mode: Learners can't improve their skills if they can't fully participate in the training experience. For example, if the training delivery required learners to use Lotus Notes and the learner is not fluent in Lotus Notes, the training will have little chance of success. Therefore, the prerequisite knowledge and skills the learner must have related to the type of delivery must be analyzed.

TIPS AND SHORCUTS FOR LEARNER ANALYSIS

- Talk to the manager.

- Avoid surveys; they typically tell you what people think you want to hear.

- Watch the people do their jobs.

- Don't overanalyze. The more you analyze, the more discrepancies that you will find. At some point, you will reach the conclusion that training is impossible since each learner has a unique set of learning needs and requirements. This is called “analysis paralysis” and is caused by overanalysis.

This information comes from Entelechy's *Practical Design and Development Tips* eGuide, a 100-page guide that provides a detailed overview of ADDIE, over 100 design and development tips and shortcuts from some of the industry’s experts, a glossary of over 250 instructional design terms, and much more. For more information on this guide (or to order it), please visit our website at http://unlockit.com/eguide-HPT-PDD-EG.htm.

Note: If you have a tip for this topic, send it to me (mailto:ttraut@unlockit.com?subject=design_tip) along with your name and contact information. I will send you a free copy of Entelechy's *Practical Design and Development Tips* eGuide when we update it in June WITH YOUR TIP attributed to YOU!

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HANDLING CHALLENGING SITUATIONS WITH A CUSTOMER-FOCUSED MINDSET

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Tip: Share this article with your customer service and sales managers.

Most Customer Service Professionals deal with many challenging customer situations. These situations may include:

- A customer who is upset about the quality or delivery of your product/service.
- A product return or a cancellation of services.
- Incorrect information given to the customer.
- A customer who is negative toward your company due to past experiences.
- Confrontational issues and conflict.
- Angry customers.

- Explaining a company policy or procedure.

- Fielding a request to escalate a call to management.

The ultimate goal in these challenging situations is to provide a win-win solution. We want our customer to leave the interaction feeling listened to, well taken care of, and valued. A customer-focused mindset will have a tremendous impact on accomplishing these goals. Along with customer focus, an invaluable tool for dealing with challenging situations is the Five-Step Process.

THE FIVE-STEP PROCESS

Have you ever been an upset customer, calling your product or service provider with a serious problem? If you receive a satisfactory resolution AND you feel listened to, well taken care of, and valued during your interaction, aren't you likely to consider doing business with this company again? The Five-Step Process will help us to provide our customers with this positive experience. Aside from reaching a win-win solution, the goal of the Five-Step Process is to leave our customers feeling listened to, well taken care of, and valued. Let's examine the specific steps of the Five-Step Process.

Step 1 – Strategize

How do you develop a strategy?

- Develop your goal for the interaction. What do you want as the end result? (i.e., save the customer, resolve an issue, etc…)

- Identify your parameters: what can you do or provide the customer independently or with your supervisor's approval? What CAN'T you do because of policy or business reasons?

- Prepare by identifying common problems and win-win solutions.

Your strategy should be to arrive at a solution that will be a win for both your company and the customer. If you are successful, you will retain the customer, exceed the customer's expectations, and provide a very positive customer experience so that he/she will want to continue doing business with your company.

Step 2 – Acknowledge

The acknowledgement is essential to communicating in challenging situations. Use phrases like, "I understand how you feel", "I see", "I apologize", "I am sorry", "I can see how you might feel that way" so that customers feel that they have been heard and that we respect them. It clears the way for us to move forward by helping diffuse the emotion and placing us on the side of the customer.

Step 3 – Clarify

Sometimes we mistakenly proceed to resolve a problem based on what we THINK the customer was saying. This third step of the process allows us to clarify and draw out information to make sure that we understand the customer's true concern. Examples of clarifying might include:

- "What I hear you saying is……is that right?"
- "Can you tell me more about…..?"
- "How may I help you….?"
- "What were you hoping would happen…?"

Clarifying leads us to the appropriate solution in a more efficient manner.

Step 4 – Present Resolution

The fourth step is to present a resolution. Presenting a resolution is not a challenge if we've done the first three steps properly. As we present the resolution, we want to state specifically what we are going to do for the customer. We may also offer alternatives. Note: As we discussed in Step 1: Strategize, it is critical to understand your parameters – what you CAN do for the customer and what you CAN'T do.

Step 5 – Checkback

The checkback is our opportunity to make sure that the customer is satisfied and feels good about the resolution.

Examples of checkbacks include:

- "How does that sound?"
- "What do you think about x?"
- "Are you with me?"
- "Does that make sense?"
- "Will that meet your needs?"
- "Would that be satisfactory?"

APPLYING THE FIVE-STEP PROCESS

The following example illustrates a customer-focused approach, using the Five-Step Process.

Step 1: Strategize: Our strategy is to retain the customer whenever possible. We want to provide the customer with a positive experience while balancing both the business and customer needs. We don't want to simply accept return merchandise since we know we will lose the customer.

A customer calls to complain about the quality of the product he received.

Acknowledge: "I apologize that the product was not of the quality that you expected. I understand your frustration. I can help."

Clarify: "In order for us to improve on the quality – and for me to better serve you, may I ask what specific areas were of poor quality?"

Present Resolution: "We would be happy to exchange the product for a similar product of higher quality."

Checkback: "Would that be satisfactory?"

Depending on the customer's responses, we may actually have to go through the Five-Step Process many times during one customer interaction. The Five-Step Process will help you to avoid becoming argumentative by lessening the conflict and opening dialogue with the customer. It will assist you in providing a more positive customer experience.

This information comes from *Handling Challenging Situations*, a module in Entelechy's *High Performance Customer Service* program. For more information, visit our website at http://unlockit.com/HPCS.htm.

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Terence Traut, President of Entelechy "unlocking potential"

ttraut@unlockit.com

phone: 603-424-1237

fax: 603-424-6361

http://www.unlockit.com/