

Redesigning and Developing an Intensive and Engaging Employee Training Program

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Problem(s)

I work for an online marketing company that primarily works with small businesses, nonprofit organizations, and membership associations. We help them meet their marketing needs by using multiple campaign platforms and real-time reporting metrics. We offer email marketing, social media marketing, online survey, event hosting and marketing, digital storefronts, and local deals tools.

My title within the company is Learning Specialist and I belong to the New Hire Training Team, underneath a much larger training team umbrella. Our company employs over 1,300 employees with a third of those belonging to our support organization. Our training team consists of several different groups of trainers that range from New Hire training (we train newly hired employees) to Outside and Customer training (they host local seminars and online webinars for customers).

As our company continues to grow its customer base, our need for additional support staff continues to grow as well. On average, at least 25 new support representatives are hired each month across two locations. Our three week training program teaches the new hires about the company, its culture, how to use our suite of products, and then how to support the products to our customers, all while coaching them to use our products in a successful manner.

The company's current attrition and termination rates, within the support department, are at an all-time high. Many of these employees are leaving within the first three months after training has completed (whether voluntarily or involuntarily). Information collected from exit interviews shows that these employees are leaving due to lack of confidence when they begin taking calls on the support floor. Many of the reps feel that they do not retain enough information from training and they are unable to meet the standards required to excel within their role. There has also been a large call out for additional training to help retention rates as well as to help continue to educate our *current* employees so that they may continue to excel with the opportunity to promote.

About two years ago, we started sending surveys to the new hires at the end of each week of the three week training program. The questions were designed to gauge the trainee's levels of enthusiasm, knowledge intake, and confidence. There were also several questions that asked for the trainee's input on our training program, specifically, the subjects and how they're taught.

The survey results showed several problems with our program:

1. The program's curriculum reaches out to auditory and visual learners while completely leaving out kinesthetic learners.
2. The trainees' levels of confidence were extremely low. They felt ill-prepared to begin taking calls on the support floor, even after three full weeks of training.
3. The trainee's levels of enthusiasm were extremely low. Due to no dedicated support, the trainees felt that they were "locked out" and "left to fend for themselves."
4. Trainees stated that they were not retaining information due to many of the sessions lacking engagement and stimulation.
5. The program's knowledge assessments were too complicated due to lack of retention of the subject matter the trainees were being tested on.

Intervention

As one of two Learning Specialists on the New Hire Training Team, I have firsthand knowledge of how the entire training program works. After brainstorming with my training partner, we developed a strong plan of action to redesign our current New Hire training program to be more blended learning based and include eLearnings and a nesting program (a period of time after training where each trainee would "nest" with a mentor until they felt confident enough to be alone on the floor). The plan enabled us to develop an intensive and engaging program to train and educate our new employees and to help set them up for better success within their new roles.

Before the program's redesign, the training program for newly hired support reps was three weeks long. It was facilitated by a trainer who would stand in front of the training room and lecture with the aid of several PowerPoint presentations. Once the three weeks were completed, the new hires were then fully immersed in the call center environment. They would take anywhere between 15 and 50 calls a day with only online FAQs and their cubicle neighbors for support. Redesigning the program to be blended learning based with several eLearnings would enable us to better teach to all types of learners and in various environments.

Goals

Our plan to redesign and develop the new training program supported several goals:

Short Term	Implement engaging, informative, and thorough eLearnings into all subjects of training - setting our new hires up for success
	Shorten the New Hire Training program from three weeks to two (not including the “nesting” portion)
	Instill better confidence in new hires as they begin their roles on the support floor
	Provide constant support through a “nesting” program where each new hire is assigned a mentor until no longer needed
	Teach to all learning styles (auditory, visual, and kinesthetic) in various environments (collaboratively in a training room or alone in a cubicle or home office)
Long Term	Lower attrition and increase retention
	Pave the way for eLearnings to be used to educate <i>current</i> employees on product updates and enhancements
	Provide a fun and supportive work environment that encourages continuous learning and career development

Plan

Our plan could be split into several steps:

1. Compile survey data and responses into collective and easy-to-read format
2. Meet with our stakeholders, subject matter experts, and leadership team to get buy-in for implementing eLearnings and the “nesting” program
3. Test and choose a learning management system as well as an eLearning program
4. Redesign all current sessions using eLearning program
5. Develop “nesting” program (develop mentor roles and search for potential candidates)
6. Test new courses and “nesting” program on a future new hire class
7. Report on findings to stakeholders, SMEs, and leadership team
8. Make improvements to new program based on findings
9. Implement successful redesign to all future classes with continuous improvements
10. Build eLearnings for current support reps to continue education beyond new hire training

My training partner and I fully believed that these ten main steps would help us achieve our above mentioned goals. To set our plan in motion, I utilized Ely's eight conditions that proved successful implementation of innovations (Surry and Ely, 2001):

1. Dissatisfaction with the status quo	The previous training sessions lacked engagement and only catered to specific types of learners. New hires complained of lack of information retention.
2. Knowledge and skills exist	Knowledge and skills with computers is mandatory for all employees. Most of the training team is already quite familiar with developing and publishing eLearnings.
3. Availability of resources	Each employee is in possession of a company computer or laptop. All created resources and eLearnings would be housed on Box, the companywide share cloud, where anyone within the company could access them.
4. Availability of time	New Hires were required to spend their first three weeks fully immersed in training. Current support representatives work different shifts throughout the day, but they can request to have hours scheduled specifically for training opportunities. Availability of time would never be an issue.
5. Rewards and/or incentives exist	Incentives for the company would be lower attrition, higher retention, happier employees, and more satisfied customers. Rewards for the employees would include better call statistics (average handle time, average hold time, calls per hour, customer survey scores) which could lead to a higher monetary incentive and the possibility of promotion.
6. Participation	The training team works very closely with management in all stages of trainings.
7. Commitment	The New Hire Training Team would be fully committed to the redesign and development of this program as it's what we're paid to do. We're also a part of the company and we genuinely want to see it succeed.
8. Leadership	All leadership would be on board with this implementation as everyone in the support organization has the same common goals (listed above).

Evaluation

Throughout each week of the “new” training, we continued to send out surveys to each trainee. As each new class of trainees came and went, we continuously made improvements to the program based on the survey feedback. To evaluate the success of the changed program as a whole, we utilized the survey responses as well as the data received from the first three months of the new program.

The **survey responses** were based on questions regarding:

- Training style
 - Facilitator led eLearnings
 - Non-facilitator led eLearnings
 - Instructor led classroom sessions
- Environmental issues and impacts
 - Classroom setting
 - Cubicle setting
 - Home office setting
- Session content
 - Engaging
 - Informative
 - Inspiring
 - Fun
 - Knowledgeable content
 - Content appropriate to role

The **data from three months’ classes** (September, October, and November) that attended the new training tracked the following:

- Attrition
- Retention
- Customer Survey Scores
- Average Hold Time (AHT)
- Average Calls per Hour (ACH)
- Average Call Time (ACT)
- Weekly Mentor feedback
 - How well trainees retained information each week
 - How often trainees needed to utilize online FAQs
 - How many times trainees reached out to the Tier II Tech Support Team

After each new monthly new hire class, my partner and I conducted meetings with each section of our leadership team (which consisted of training management, support organization management, team leads, group managers, senior managers, and the executive team over the support organization) as well as with our stakeholders and subject matter experts from other departments. To be as successful as we possibly could with our new training program, we needed to constantly keep all of these groups informed with what was happening each month, and the contrary. By utilizing the data received from the trainees’ survey responses along with the shared information from our leadership meetings, the new training program was set up for success.

Findings

Early on in the design process, my training partner and I realized that shortening the length of training would be quite difficult and possibly have a more negative than positive effect on the new hires. Upper Management wanted to shorten training to have the new hires on the floor sooner but it was decided that all current training sessions would stay, but would be redesigned to align with our new training goals. Our initial plan to have training be only two weeks actually turned into five weeks once we added on the two weeks of the nesting program. The two tables below show what training looked like before implementation, as well as after.

BEFORE	Monday	Tuesday	Wednesday	Thursday	Friday
Week One	Instructor-led, classroom training 9am-5pm				
Week Two	Instructor-led, classroom training 9am-5pm				
Week Three	Instructor-led, classroom training 9am-5pm				
Week Four	Start taking calls at desk in live environment	Start taking calls at desk in live environment	Start taking calls at desk in live environment	Start taking calls at desk in live environment	Start taking calls at desk in live environment

AFTER	Monday	Tuesday	Wednesday	Thursday	Friday
Week One	ePresentations, instructor-led sessions, and hands-on activities 9am-5pm	ePresentations, instructor-led eLearnings and trainings, product demos 9am-5pm	Product demos, self-paced group projects 9am-5pm	Self-paced group projects, group presentations 9am-5pm	Instructor-led sessions, self-paced eLearnings 9am-5pm
Week Two	Instructor-led sessions, self-paced eLearnings 9am-5pm	Instructor-led sessions, SME sessions 9am-5pm	Self-paced online learning, home environment 9am-5pm	Self-paced online learning, home environment 9am-5pm	SME sessions 9am-5pm
Week Three	Role-playing, scenario-based learning, Nesting Program 9am-5pm	Role-playing, scenario-based learning, Nesting Program 9am-5pm	Role-playing, scenario-based learning, mentorship, Nesting Program	Desk time/ Mentorship, Nesting Program 9am-5pm	Desk time/ Mentorship, Nesting Program 9am-5pm

			9am-5pm		
Week Four	Taking calls within Nesting Program				
Week Five	Taking calls within Nesting Program				
Week Six	Taking calls at desk in live environment				

The initial roll out of the new program (in September) went really well. The few issues that we did encounter mainly pertained to technology issues with training from home. It turned out that many of the new hires thought they had the required technology to train from home but in fact they did not (internet speed was too slow, computer hardware didn't meet minimum requirements, etc.). After the first month, the home environment learning was optional and trainees could choose to train from their desks instead.

After only three months of training with the new program, it has been deemed quite a success. The graph below gives a small glimpse into the positive data changes that we've seen over the last three months and shows that we've had a decrease in average call time (reps are answering customer inquiries faster), an increase in customer survey scores (customers are happier), and the tech support escalation rate has decreased (support reps are not reaching out to the next level of help as often). Note: All data comes from a comparison of previous months' trainees, not seasoned support reps.

	Instructor-Led Training (BEFORE)	Blended Learning Program (AFTER)
Average Call Time	15:36	12:34
Customer Survey Scores	96.9%	99.2%
Tech Support Escalation Rate	9.5%	7.2%

The trainees' survey responses and the support data already show that we have, and are still in the process of, meeting all of our goals:

Short Term:

- *Implement engaging, informative, and thorough eLearnings into all subjects of training - setting our new hires up for success*
 - Survey responses show that almost all trainees found the session content to be "Extremely" engaging and informative.
- *Shorten the New Hire Training program from three weeks to two (not including the "nesting" portion)*
 - As explained above, this goal was adjusted to better meet the needs of our trainees.

- *Instill better confidence in new hires as they begin their roles on the support floor*
 - Survey results show that 97% of trainees felt “Extremely Confident” once training and nesting was complete.
- *Provide constant support through a “nesting” program where each new hire is assigned a mentor until no longer needed*
 - The scope of the nesting program changed after the first month of implementation. We sequestered the new hires in a large training room, each with a full set up of phone and computer equipment, which simulated the real environment. Instead of one mentor per trainee, two mentors walked around the room every day answering questions and helping with calls. At the end of each day, a “parking lot” session occurred where each trainee could ask questions they’d written down throughout the day. This helped the trainees work together and learn from each other’s questions and calls.
- *Teach to all learning styles (auditory, visual, and kinesthetic) in various environments (collaboratively in a training room or alone in a cubicle or home office)*
 - Survey responses show that almost all trainees “Extremely” valued the various forms of learning (facilitator-led training, facilitated and self-paced eLearnings, ePresentations, group work, etc.).

Long Term:

- *Lower attrition and increase retention*
 - Before implementation of the program, at least two new hires would leave the company before the end of their second month. It’s still too early in the data to predict real outcomes, but as of right now, we still have every trainee we hired since September 1st.
- *Pave the way for eLearnings to be used to educate current employees on product updates and enhancements*
 - Our release trainings are no longer sent out as PowerPoint presentations but are instead created as engaging eLearnings.
- *Provide a fun and supportive work environment that encourages continuous learning and career development*
 - There are now dozens of eLearnings being created with several already deployed to current employees. Eight months ago, only three people on the training team had any type of eLearning software. Now there are nine and we have created an eLearning training group. We will soon be implementing an LMS that will track employee training and a new promotion ladder for support reps is being discussed among upper management (that has been in the works for almost a year).

Conclusion

The entire process of implementing a new training program was at times, an extremely daunting, although quite rewarding, task. Support training makes up such a small percentage of what the training team actually does, but it is the training that in fact, ends up touching what is most important to our company...our customers. Poorly trained support representatives equates to unhappy customers. It wasn't until I began work on this redesign that I realized how important the training of these employees actually is.

I found that communication played a role of utmost importance in such a process as this, as much of our new training depended on people in roles outside of our actual training team. More so than ever, we leaned heavily on the IT department as well as the various subject matter experts who now facilitate or lead several sessions. Going forward, the support training team will need to communicate heavily with these outside roles to ensure that training is up-to-date and consistent across both of our call center sites.

Despite our successes with this project, a major lesson learned is that a specific project manager should have been in place to control and guide the entire change effort. While we were directed by a great management team, it often felt that we were blindly creating new content and trying new methods with only the hope that everything would be well received. We are still considered a new company and our training team is still developing its skills (we're lucky to work for a company so willing to teach and advance its current employees). But because of this project, I've developed a new professional goal in the area of project management. The next time I participate in such an endeavor, I'd like play a bigger role in leading it!

Resources

Surry, D.W., & Ely, D.P. (2001). Adoption, diffusion, implementation, and institutionalization of educational innovations. In R. Reiser & J. V. Dempsey (Eds.), *Trends and issues in instructional design and technology*. Upper Saddle River, NJ: Prentice-Hall. Draft online:
<http://www.southalabama.edu/coe/bset/surry/papers/adoption/chap.htm>