



Training Needs Assessment

Name: Thomas Brown

Client: Purrfectionary

Date: 08/16/2020

Subject Area and SME

Determine a subject area from your current or future learning environment and identify a source that you will use for developing the instructional content from a subject matter expert

The subject area focus of the current to the future environment is consumer relationship management. Bhagyashri defines this relationship, (2015 p. 2) "is about perfecting relationships to maximize customer's satisfaction and loyalty over time." This relationship is essential to any business's longevity in their industry. Customer Relationship Management or CRM focuses on customers over the products and customer requirements advocational propositions.

External SMEs like Grewal, Krishnan, Lindsey, as well as Ngo and Nguyen conclude that customer service is the most or one of the most significant factors in customer satisfaction or loyalty. Their studies in customer satisfaction and loyalty have produced strategies or factors that can lead to increased customer satisfaction and, thus, customer loyalty. Their knowledge would be invaluable in creating training for Purrfectionary.

Ngo and Nguyen (2016) state, "Customer satisfaction is becoming one of the most essential objective which any firm seeking for long-term relationship with customer considers as the top priority." (p. 105) They concluded this through the study of 850 customers using 11 banks in Vietnam. The survey asked them to rate their overall quality of service, customer satisfaction, and customer loyalty on a 7-point Likert scale. The study concluded that there is a complex interrelationship between all three of the areas studied.

Grewal, Krishnan, and Lindsey's study came up with strategies that are influenced by the perceptions or needs of customers. Grewal, Krishnan, and Lindsey state that, "however shoppers choose to measure service, retailers are constantly evaluating the customer experience to ensure that people are receiving the best service possible." (p. 346) The following are choices that the study found to be relevant to customers. The availability of service personnel with the reliability of the service provided is the most crucial judgment factor for those customers. Training in this area will focus on the managerial staff target audience. Customer and service personnel interactions are another area that is crucial to sales conversions. The achievement will rely on training the front-line representative audience on how to interact with customers socially to create a positive customer experience. Lastly, the interactions online and the loyalty programs will be focusing on the corporate audience to create realistic human-like experiences and provide time-critical information to customers via multi-communication channels so they can make the best decisions.

CRM will allow SMEs, such as marketing directors and corporate trainers, to be in sync with store managers and front-line representatives. This synchronicity will allow corporate trainers and store managers to align current marketing and customer relations goals much more quickly. It will also allow for

the evaluation of front-line representatives on a more consistent basis allowing for corrections as the need arises.

The SMEs identified are the Director of Customer Relations, Director of Training and Development, Director of Operations, Regional, Area, and Store Managers, and then front-line representatives with more than three years full-time and less than six months experience. This wide variety of SMEs will allow the project to create a varied approach to how the training for each target audience would be most effective. Focus groups, consumer relationship surveys, and training surveys will also allow the project to gain insight into what is missing in the current training program to understand better what changes are most needed.

Resources

- Bhakane, Bhagyashri, Effect of Customer Relationship Management on Customer Satisfaction and Loyalty (June 13, 2015). *International Journal of Management (IJM)* Volume 6, Issue 5, May (2015), pp. 01-07, Available at SSRN: <https://ssrn.com/abstract=2618014>
- Grewal, D., Krishnan, R., & Lindsey-Mullikin, J. (2008). Building Store Loyalty Through Service Strategies. *Journal of Relationship Marketing*, 7(4), 341–358. <https://doi-org.oclc.fullsail.edu/10.1080/15332660802508406>
- Ngo Vu Minh, & Nguyen Huan Huu. (2016). The Relationship between Service Quality, Customer Satisfaction and Customer Loyalty: An Investigation in Vietnamese Retail Banking Sector. *Journal of Competitiveness*, 8(2), 103–116. <https://doi-org.oclc.fullsail.edu/10.7441/joc.2016.02.08>

Target Audience

Define the specific segment of the target audience

Breaking the target audience into three distinct groups, corporate, managerial, and front-line representatives will allow training to be more participate focused. Front-end representatives are the broadest audience calculating an average of 12 representatives per store, with 200 stores totals out to 2,400 representatives. The average representative is between the ages of 16 to 45, depending on the region and has varying levels of customer service or previous work experience. Education level is a high school diploma or equivalent, with most training being on the job. Three-quarters of this audience are full-time with benefits with most part-time without benefits being between the ages of 16 to 24 years old.

The next largest group is the managerial team, which consists of 6 regional, 24 area managers, and on average, 400 store managers, and assistant managers altogether. The average store and assistant managers have a minimum of 3 to 5 years of retail experience up to 10 to 20 for the area and regional managers. Managers range from 21 to 65 years in age and have either some college education up to a bachelor's degree. All manager positions are full-time and salary with benefits.

Lastly is the corporate group, which consists of customer relations, training and development, and operations. The comprised groups have a total of 40 total corporate employees that develop, train and execute the vision of Purrfectionary's executive team. The average age range is 30 to 50, with 10 to 25 years of experience. Every single corporate employee has at least a bachelor's degree or higher. All corporate employees are full-time, salary with benefits as well as company stock buy-in.

Resources

- Unknown, 2020, U.S. Bureau of Labor Statistics, Retrieved from <https://www.bls.gov/ooh/office-and-administrative-support/customer-service-representatives.htm>

Unknown, 2020, U.S. Bureau of Labor Statistics, Retrieved from <https://www.bls.gov/iag/tgs/iag44-45.htm>

Unknown, 2020, U.S. Bureau of Labor Statistics, Retrieved from <https://www.bls.gov/ooh/management/sales-managers.htm>

Unknown, 2020, U.S. Bureau of Labor Statistics, Retrieved from <https://www.bls.gov/ooh/management/training-and-development-managers.htm>

Desired State

Identify the knowledge or skills required for the target audience to achieve success in the subject area

The desired state is one in which the customer is not just greeted with-in thirty seconds from entering the store but has a great overall customer experience concluding with a sales conversion. Knowledge in three key areas is needed to achieve success in customer service relations management. Those areas are customer hospitality, brand authenticity, and product knowledgeableability. These areas will allow all audiences to understand their roles concerning the customer.

Front-line representatives will know how to approach customers faster and friendlier, convey the appropriate brand messaging authentically while helping customers find the right product for them through product knowledge. This knowledge will better equip Managerial staff to assess and assist both front-line and corporate staff in making the needed adjustments to both training and performance of customer relations priorities. Corporate staff will understand the triumphs and roadblocks that managerial and front-line staff are experiencing to take action to alleviate or eliminate roadblocks and incorporate best practices that are working or making the experience better.

Current State

Identify the target audience's current knowledge or skills and the gap between the current state and the desired state

Currently, there is little to standardized customer relations training for managerial and front-line staff besides what is in the written handbook. This handbook consists of the mission and vision statements with little actual training on what makes a great Purrfectionary's customer experience. This lack of standardization has led to the degradation of customer experience over the time of expansion. The responsibility of training deligated to the individual regional, area, and store managerial staff to then take the mission and vision and train in their way. This non-standardized training creates confusion or a lack of understanding between store experiences for the customer. This confusion leads to customer expectations being negative when there is not a clear understanding of what to expect from the brand.

Current training is may also have gaps in the duration, quality of delivery, and assessment of core competencies completed during training. These gaps can also lead to poor customer experience due to store staff not understanding their roles in the customer experience or how to improve that experience within their roles. It is important to note that proper time to absorb concepts, delivery of concepts, and assessing absorption of concepts is critical to any good training program.