

Sample Learning Solution Designs

We developed the following learning solutions based upon each company's specific needs. We discovered these needs by conducting a thorough needs assessment to make sure we were creating the right solution. We then designed solutions to address the target group's challenges and areas for development.

Our learning solution designs often include:

- Focus groups and/or e-mail survey with the target group(s) and their manager(s)
- Interviews with key individuals
- Sampling the target group's work
- Customer surveys

Solutions can include:

- Pre-tests
- Post-tests
- Executive overviews
- Individual coaching
- Individual study
- Pre-work
- Assessments
- Individual self-study
- Group training sessions
- Custom audio-learning
- Customized manuals/learning guides
- Homework
- Job aides
- Follow up with individuals, teams and/or their managers
- CD-ROM, audio, video, computer-based, or Web-based self-study

Morgan Seminar Group

1440 Newport Ave. ▲ San José, CA 95125-3329 ▲ 408/998-7977 ▲ Fax: 408/998-1742
Rebecca@RebeccaMorgan.com ▲ www.RebeccaMorgan.com

Create and implement “Parking Cashiers Customer Service Ambassador Program”

Third largest municipality in California

Our level of responsibility

I was responsible for the total design and implementation of this project, working with the city’s Parking Administrator.

Duration of the engagement

1 year.

The problem(s) presented to us

How to train cashiers in city-run parking lots to use customer-focused language and behaviors that will encourage visitors to return to the city for events and shopping.

Our steps in solving the problem

- Held focus group with city and parking managers to understand their issues, and clarify their expectations.
- Held focus group with parking cashiers to understand their issues, and clarify their expectations.
- Interviewed additional cashiers to understand their challenges
- Visited all city’s parking garages to determine current level of service
- Read the city’s parking procedures and watched their current videos
- Interviewed content experts
- Determined training and design process for customized, self-study materials to fit the city’s customer communications needs.
- Wrote and designed self-study materials for the cashiers to understand customer service processes and concepts.
- Created “practicums” for the managers to test the cashiers ability to apply the concepts to real situations.
- Wrote leader’s guides for the managers/supervisors
- Created pre- and post-tests for the training
- Designed customer surveys; created incentives for customers to return surveys
- Wrote script and recorded the training material on audio tape so the cashiers could listen to the information again, after the trainings.
- Designed and delivered group training for managers/supervisors
- Designed and delivered group training for cashiers to explain program
- Created job aids.

Results achieved

This training program was launched, with the group training of the cashiers. The supervisors, managers and cashiers were excited about the content and process of the learning. The managers, supervisors, and city officers report observing cashiers already using the skills from the program.

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Create and implement technical leads supervisory training program

World's third-largest software company

Our level of responsibility

I was responsible for the total project—design, coordination and implementation of the 8-month program. Originally, I interfaced with the Training Manager, but before the project was rolled out, she left for a year's sabbatical. During the project, I interfaced with the HR Manager and Training Coordinator. I was the primary consultant who worked on this project, although I worked with 5 internal and external guest speakers/content specialists.

Duration of the engagement

8 months

The problem(s) presented to us

The problem was creating management and leadership skills in technical leads in a flat organization, with no supervisors, only leads and managers. Most of the leads had no human relations or management skills training, and little experience leading others. No training like this had ever been done at this level in this company.

Our steps in solving the problem

- Held 2 focus groups to determine what the managers wanted their leads to learn, as well as what the leads themselves wanted to learn.
- Organized this input into 16 distinct learning modules, creating objectives and outlines for each session.
- Determined the timing of and spacing of each module so as not to disrupt the running of the business, but still ensure retention of learning.
- Refined the module objectives, content focus, and sequence with the Training Manager.
- Sent notification of the Leads Training Program to the managers. Received their registration for their leads.
- Ordered materials, created custom binders for materials.
- Held 16 half-day seminars (coordinated with guest speakers, when necessary). Created customized worksheets. Assigned pre-work for each session. Designed activities for each session.

Results achieved

The managers reported that their leads displayed more confidence and willingly took on more responsibility as a result of this program. The leads initiated activities which relieved the managers of some of their tasks. The leads reported significantly better working relationships with their managers, team members, and contractors. The program was so successful, the company wanted us to repeat it with two new groups.

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Create self-study customer service training program for new hires

Computer bookstore chain

Our level of responsibility

I was responsible for the total design and implementation of this project, working closely with the company's COO, CEO and Regional Manager.

Duration of the engagement

15 months

The problem(s) presented to us

How to immediately train newly-hired "Information Specialists" in store procedures and customer-focused communication. They must begin their training on their first day, but a manager or associate is not usually available to spend as much time as needed to train them well. So a self-study training process was created that included "practicums" at the end of each module, which required a manager to role play with the trainee to check for understanding.

Our steps in solving the problem

- Held focus group with executives to understand their issues, and clarify their expectations.
- Visited all stores to determine current level of service.
- Read the company's procedures.
- Interviewed content experts.
- Determined training and design process for customized, self-study materials to fit the company's customer communications needs.
- Wrote and designed self-study materials for the Information Specialists to understand customer service processes and concepts.
- Created "practicums" for the managers to test the Information Specialists' ability to apply the concepts to real situations.
- Wrote leader's guides for the managers.

Results achieved

This training program was delivered to the client. The client was to complete the tests for each chapter, and have a group training to introduce the program. In the interim, the company was sold. The current owners want to continue with the project, but other priorities have kept key individuals from completing the tasks needed to move forward.

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Co-create a 3-day deployment training session for managers for a world-wide strategic engineering process change

World's largest disk and tape driver manufacturer

Our level of responsibility

I was responsible for the "learnability" of the information. I worked closely with the Executive Director for this initiative and the core team for world-wide implementation.

Duration of the engagement

Dec. 1999-present

The problem(s) presented to us

How to get the VPs, Directors and Managers to buy in to the new strategic initiative, and support it. How can they learn the key concepts so they can then supervise their direct reports and ensure they follow the new process.

Our steps in solving the problem

- Review past management training programs on this process.
- Review current class being presented to engineers on this process.
- Work with curriculum team to create measurable objectives.
- Create training flow and lesson plan.
- Refine visuals with content expert/instructor.
- Attend team meetings to understand desired outcomes.
- Participate in pilot program.
- Redesign program based upon pilot feedback.

Results achieved

This program is still in progress, so we can't report results yet.

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Create a highly-customized customer service training program for the Parking Control Officers (PCOs)

International airport for California's third largest city

Our level of responsibility

I had total responsibility for the design of this program. I worked closely with the department manager and supervisors.

Duration of the engagement

1 month

The problem(s) presented to us

The airport PCOs are regularly faced with unhappy, irate, and belligerent public (customers). They possess varying degrees of skills for handling these situations with professionalism, politeness and authority. There needs to be consistency among all PCOs. As the Airport becomes more congested, especially Friday and Sunday nights, and holidays, PCOs need to sharpen their people skills to keep on top of tense situations.

Our steps in solving the problem

- Monitor the PCOs on two of their busiest days to assess their level of customer communication skills
- Interview managers to see what skills they think need to be improved.
- Interview PCOs to see what their biggest challenges are.
- Design and deliver two one-day "Customer Service Survival Skills" program

Results achieved

Nearly all of those who attended the seminar said the training was "the best we've ever had." They said it helped them shift their negative attitude toward their customers and their job. The manager reports he's only heard positive comments about the program, and people are still talking about it months afterwards.

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Create an ongoing “Customer Service Survival Skills” training program

International insurance services call center

Our level of responsibility

I had total responsibility for the design and implementation of this program. I worked closely with the General Manager and Customer Service Manager.

Duration of the engagement

1 year

The problem(s) presented to us

How to upgrade the customer communication skills of the tele-service reps, who work in a very stressful environment, taking 200 calls a day from irritated callers. Since the executive wanted to reinforce the learnings, he wanted individual coaching to follow the seminar.

Our steps in solving the problem

- Monitor a representative sample of the reps to assess their level of customer communication skills
- Interview managers to see what skills they think need to be improved.
- Design and deliver one-day “Customer Service Survival Skills” program
- Coach each participant in real time, monitoring their calls with them and coaching them afterward.
- Train the leads/supervisors on how to coach their staff.
- Hold training classes each quarter for new hires.

Results achieved

Nearly all of those who attended the seminar and received the coaching showed a marked increase in their customer responsiveness, as shown by before and after monitoring sheets. The company increased their client base, because prospective clients could hear how professional their account was going to be handled.

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Create a highly-participatory team cooperation event

Largest credit card company's international marketing department's quarterly team retreat

Our level of responsibility

I had total responsibility for the design and implementation of this process. I worked closely with the department manager and assistant manager.

Duration of the engagement

1 month

The problem(s) presented to us

The department recently downsized from 60 to 22. Some of the current team came from other departments. This would be the first real team process they would experience together. The manager wanted something that everyone would participate in, mixing up the regular work teams, and forcing them to cooperate within their group, as well as with other groups. The process was to be creative and focused on an issue they were going to be facing in the upcoming 12 months. This meeting would be the first time they will hear of their new charge.

Our steps in solving the problem

- Clarify expectations and desired outcomes.
- Present several options that met client's criteria.
- Work with client to refine the chosen process.
- Gather the tools and materials needed.
- Facilitate the process.
- Debrief with the team.

Results achieved

The manager and assistant manager reported the process created a connectedness with their team, which has enabled them to work more cooperatively. The exercise worked so well, they want us to continue our work together.

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Create a game show for all-company customer awareness day

International power research facility

Our level of responsibility

I was responsible for the design and delivery of this game. I worked closely with the Training Manager and her staff to make sure the game format and questions were customized to the company.

Duration of the engagement

1 month

The problem(s) presented to us

How to create a fun, customer service focused, company-specific event that would energize all employees to look for the best solutions for customers. It needs to be easily manageable so that all 600 employees will feel part of the program.

Our steps in solving the problem

- Discuss overall objectives of the all-company game
- Gather questions and answers for company-specific information.
- Design and add humor to the game questions.
- Do a run through with the HR staff to work out details
- Conduct a rehearsal with the 4 teams immediately before the event.
- Emcee one-hour "Customer Service Family Feud" game

Results achieved

The client was very pleased with the level of involvement and increased customer awareness that this event initiated.

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Create and deliver customized keynote speech focused on target audience's customer service issues

International food manufacturers association

Our level of responsibility

I had total responsibility for the creation and delivery of this keynote speech. I worked closely with the association liaison and the publisher of the industry customer service survey.

Duration of the engagement

2 months

The problem(s) presented to us

Create a customized keynote presentation showing the audience of 1500 how to implement procedures that will match the customer expectations that were discovered in the most recent industry survey.

Our steps in solving the problem

- Review recent industry research results.
- Discuss results' implications with survey designer.
- Create presentation on how to implement changes that will match customers' expectations.
- Review the presentation with key advisors.
- Create slides and support materials for presentation.
- Deliver presentation at conference.

Results achieved

This project is still in progress, so we can't report final results.

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Create and deliver “Interpersonal Communication” seminar

Biochemical research company

Our level of responsibility

I had sole responsibility for the design and implementation of this program. I worked closely with the Manager of Knowledge and Learning, as well as the department manager.

Duration of the engagement

One month

The problem(s) presented to us

A senior scientist had developed a grudge against a team member, a junior scientist, and would not speak to or work with her. Counseling this employee had not created the results the manager wanted. The senior scientist had won awards for her research, so the manager didn't want to lose her, but her behavior was affecting the whole team negatively. The manager was considering transferring her to another group because her behavior had become so disruptive. The manager wanted a communication seminar to help her see the results of her behavior on the group.

Our steps in solving the problem

I interviewed the department manager at length to understand the issues, what had been done to date, and the results on any previous intervention. I helped her clarify realistic expectations that this seminar would create.

Results achieved

As a result of the discussion and information provided in the seminar, the senior scientist, who announced in the seminar she was about to quit because she was so frustrated with the junior scientist, decided, instead, to get her feelings out in the open. She spoke candidly, in front of the junior scientist, about her feelings. I facilitated a discussion between them, resulting in the senior scientist feeling heard by the junior scientist, but she made some requests that the junior scientist willingly agreed to. Amazingly, at the end they were hugging, talking and laughing in a way the others in the group were astounded by.

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