

TRAINING INTERVENTION PROPOSAL

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1. Project Background and Description

In response to the tender advertised in the Sunday Times on 22 November 2020, IQ Business would like to submit their proposal for the training intervention for Internal Sales Consultants and Customer Service Representatives.

The proposal stipulates that the solution must be the following:

- An e-Learning game (simulations)
- eLearning with content in modules for more in-depth study (animated content)

2. Project Scope

The scope of this project is an e-Learning game and adequate instructions and learning modules with assessments.

3. Proposed Solution

eLearning game:

- The game will consist of ten branching scenarios based on conducting sales and giving good customer service. Based on which set options the learner selects, there will be different consequences for the learner and customer.
- Scenarios will be agreed on with the client, but may consist of scenarios like the following:
 - 1) A new customer enters the store and is indecisive about which device to purchase
 - 2) A customer, who is deeply knowledgeable about your company's devices, has many questions about your devices
 - 3) A price-sensitive customer wants a specific device but says they can't afford it.
 - 4) An irate customer comes into the store/calls customer service because their device isn't working properly
 - 5) An irate customer demands a refund on a device their purchased

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- The learner will have two attempts to select the correct response/action at each stage before being shown the correct answer with accompanying feedback.
- Learners will earn points for choosing the correct response/action – more points are earned for getting it right at the first try, fewer for the second try.
- Learners need to earn points in to redeem gifts in the game. Gifts come in the form of extra information, such as job aids, pamphlets, summaries, and promotional gifts that learners can give to their clients.
- The game will include animated and interactive content.

Series of eLearning courses:

- A series of eLearning courses will be created covering soft skills and product knowledge.
- Each course will take no longer than 15 minutes to complete and will conclude ten assessment questions. The duration of the courses is important as we don't want employees to spend a lot of time away from serving customers in order to complete their learning and, therefore, disrupt operations.
- The courses will include animated and interactive content.

The proposed solution must include the following:

- Ability to allow internal users to access the application without downloading any software.
- Ability to interface with the existing data warehouse application and LMS.
- Ability to incorporate automated routing and notifications based on business rules.
- A Leaderboard on the learning portal that will track:
 - 1) The number of courses each learner has completed and passed
 - 2) The gifts that each learner has earned in the eLearning game.
 - 3) The leading learners per office, region and nationally
- The L&D department will also have access to substantial data on things such as how long it takes learners to complete each course, how many tries it takes them to pass, where they get stuck or leave a course, the most completed courses, etc.
- Ability to be accessed on mobile devices as Customer Service Representatives spend little time in the office and are usually visiting clients.
- Ability to be housed on Moodle LMS. This will allow the company to leverage off of the learning infrastructure that they have already invested in.
- Open (editable) files must be delivered as well as all illustration and photographs used.

Expected results:

- The aim of this project is to achieve improvements qualitative and financial performance amongst sales employees.
- Therefore, we forecast that our learning solutions will lead to a **2% increase in sales by each Customer Sales Representative in store and a 5% increase in customer retention**

amongst Sales Agents. Not only is customer retention a positive in and of itself, but it also allows opportunities for cross- and up-selling customers.

4. Supporting Information for Proposed Solution

Many things outside of the learning solution itself affect its success. These are things such as buy-in from the relevant company departments, unmotivated employees, etc. Therefore, we propose the following:

1. A list of relevant team members. A meeting with all relevant stakeholders and department representatives to decide on the following:
 - 1) Measurement goals. The measurement goals that they would like used to measure the project's success. This will involve identifying the key KPIs that the solution should focus on improving employees' performance on. This will enable us to establish the cost-benefit relationship of this project in relation to the employees' performance. It is important that the learning objectives of the learning solutions align with the company's goals and objectives. Here, we can also discuss a variety of viable options for your learning proposal and allow you to share your suggestions with us.
 - 2) An evaluation strategy, including data analysis of data from the LMS
 - 3) Data collection plan that includes time frames
 - 4) A communication plan of how employees will be informed of the new learning solutions

5. Specific Exclusions from Scope

The project will be rolled out in two phases. First, the eLearning game will be demoed with a group of ten participants. Once all issues have been resolved, the Game will be made live for the entire Sales department.

Secondly, the ten eLearning modules will be rolled out three months later. A similar testing phase will precede the modules going live.

APPROVAL AND AUTHORITY TO PROCEED

We approve the project as described above, and authorize the team to proceed.

Name	Title	Date
Chief Executive Officer		

Head of Human Resources		
Director of Sales		
Project sponsor		

Approved By

Date

Approved By

Date