SDS L2C2 Instructional Design (ID) Team – Discovery Document

Overview

Amazon's Tukwila WA CS site is reporting an increase of 106.67% year-over-year (YOY) in customer escalations specifically related to customer dissatisfaction (phone and chat interactions) with Customer Service Agents (CS) the last 3 business quarters - 500 in Q3 2022 (250 in Q3 2021) 600 in Q4 2022 (300 in Q4 2021) 450 in Q1 2023 (200 in Q1 2022)

Discovery Questions – Client/SME

Q&A with client/SME Kristan Stewart during discovery meeting 3/22/23

1. Who is the target audience you are looking to impact with this training?
   a. All existing Customer Service Agents (US based) and new hires moving forward.
2. How does the behaviors we are looking to address impact the business?
   a. We (Tukwila site) are reporting an increase of 106.67% year-over-year (YOY) in customer escalations specifically related to customer dissatisfaction (phone and chat interactions) with Customer Service Agents (CS) in the last 3 business quarters.
3. Is there any existing training that currently addresses this behavior?
   a. Nothing currently.
4. Is there an established skill level for these behaviors that the target audience is expected to possess?
   a. No.
5. If there is not an established skill level, what skill level (scale of 1-5) is required for this target audience?
   a. 3-5
6. What is the desired training approach for this training?
   a. Interactive eLearning hosted on KNET for all current employees with integration into new hire Embark plans for new hires moving forward.
7. Are there any technical limitations that could impact the user experience?
   a. No. All agents are US based at the Tukwila site. Internet and network is capable and all users have company issued computers with access to all Amazon eLearning platforms/LMS.
8. Are there any specific requirements for measurement/data reporting?
   a. No. Measurement/success strategy is expected to be proposed by the L2C2 Instructional Designer.
9. Is there a specific date/timeline in mind for final development and launch of the training?
   a. Yes. We (Tukwila site management) is hosting an event "Customer Excellence Focus Week" 5/15/23 - 5/19/23 and we have approval for our CS agents to complete this training and attend customer service workshops hosted by site HR and Management.

OTJ Performance

The L2C2 Instructional Design team will develop a training to directly address skills gap in the customer service skills that are leading to dissatisfied customer escalations. This training will focus on improving **Active Listening, Remaining Calm, Building Rapport, Professional Communication, Assessing Customer Needs** and **Proposing Solutions**. These training topics are currently lacking in training and improving CS Agents skill level in these topics will improve their on-the-job (OTJ) performance related to handing difficult customers. CS Agents' current OTJ skill level in these topics is below performance expectations (0-1) based on a scale of 1-5.

LEARNING HYPOTHESIS: *By focusing on training these specific behaviors, we will improve Tukwila's CS Agents ability to handle difficult customer situations, which will lead to a reduction in both non-executive and executive escalations.*

The training will require CS Agents to exhibit level 3-5 customer service skills to complete. By enforcing the learning objectives using a final assessment in the training, all CS Agents that complete the training will have exhibited these skill levels. It will be our recommendation to implement this training for all existing CS Agents, and incorporate into new hire training plans (Embark) moving forward. We also recommend that this training be required to be completed by all CS Agents annually as a refresh.

Success of the training will be measured by monitoring the percentage of CS Agents completion of the training, a 30-day post completion knowledge check deployed via email and measuring percentage of reductions in escalations (non-executive and executive) related to customer dissatisfaction post training launch. Training completion data and survey data will be gathered and assembled by the L2C2 Instructional Design team and communicated to site HR/MGMT on a monthly/annual basis. Escalation data will be provided to the L2C2 Instructional Design team by Tukwila site MGMT for success measurement.