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Webistia Customer Service & Sales Training

Project Information	
Project Title	Webistia Customer Service & Sales Training
Project Purpose	This project is help support the implementation of Webistia's new customer service and sales consultation process by training front-line sales associates.

Roles & Responsibilities	
Project Owner	Tim Slade, Instructional Designer & eLearning Developer
Project Stakeholder(s)	Howard Reed, VP of Customer Experience Brenda Lawson, Director of Sales
Subject Matter Experts	Kathryn Newman, Customer Service Manager Josh Harvey, Customer Service Manager
LMS Admin	Bethany Taylor, LMS Admin & Communication
Other Reviewers	Sarah Lorton, Sr. Manager of Learning

Audience, Goals & Objectives	
Target Audience	New and existing sales associates with below-average sales numbers and customer service scores
Project Goal	After completing this program, sales employees will be able to demonstrate effective sales and customer service strategies when interacting with new customers while increasing sales by 10% and maintaining a customer service satisfaction score of 80% or more.
Learning Objectives	After completing this training, learners will be able to... • Create a personalized introduction when greeting a new customer. • Ask open-ended probing questions when identifying a customer's needs. • Present potential product solutions that align with the customer's identified needs. • Overcome customer objects when recommending a solution.

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Project Deliverables	
Email Communications & Explainer Video	To prepare learners for the upcoming training, they will receive an email, which will include a short explainer video about Webistia's new customer service and sales strategies.
Scenario-Based eLearning	One week prior to the in-person workshop, learners will be assigned a scenario-based eLearning course hosted in the LMS. This course provides a primer to the new customer service and sales strategies, along with common scenarios the learners will face on the job.
Two-Hour In-Person Workshop	Following completion of the self-paced eLearning course, learners will be automatically registered to attend a two-hour in-person workshop. These sessions will be scheduled on a team-by-team basis, in partnership with leadership. This workshop will be an opportunity for learners to practice the new customer service and sales strategies and ask any questions.
Job Aids	A series of on-demand job aids will be created and hosted on Webistia's internal intranet to provide additional support on the customer service philosophy, consultative sales process, and product features and benefits.

Project Milestones	
3/10 – 3/28	Initial analysis and training design
4/2 – 4/30	Development of eLearning and explainer video
4/30 – 5/14	Development of in-person workshop and job aid
5/19 – 5/23	LMS configuration and testing
5/26 – 5/30	Train the trainer with facilitation team
6/2 – 6/20	Delivery and evaluation of pilot training
7/1 – 7/31	Training delivery to all target learners
8/4 – 8/8	Evaluation and project retrospective

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Implementation & Measurement	
Implementation Plan	To validate the effectiveness of the training, we'll initially pilot the program with an A/B test for the first month with a test group of our target audience to compare results against a control group. Following those results, we'll make adjustments as necessary. The complete training program will be rolled out on a team-by-team basis, with a kickoff meeting with each team's leadership, followed by a multi-week launch of the email, video, eLearning, and workshop.

Evaluation Plan	• Open and click rates on launch email and video
	• Completion of self-paced eLearning and in-person workshops
	• Scores of in-lesson pre / post-test.
	• Sales numbers and customer service satisfaction scores:
	  ○ Increase sales by 10% by EOY
	  ○ Increase customer service scores of 80% by EOY

Constraints & Risks	• Stakeholder and SME availability for review of training materials • Providing time off salesfloor for sales associates to complete the training • Ensuring consistent use of coaching guide for sales leaders