

Ascend Hosting

Talent development plan

Opportunity / Request Summary

Client:

Ascend Hosting – Customer Service Department

Request Source:

Customer Service Operations Leadership

Request Date:

February 02, 2022

Plan Completion Date:

April 01, 2022

Request Type:

Performance Improvement and Talent Development Initiative

Summary:

This Talent Development Plan was commissioned following the findings of the **Front-End Analysis (FEA)** and **Content Discovery Analysis (CDA)** for Ascend Hosting's Customer Service Department. Leadership requested a structured learning and coaching strategy to address **declining customer satisfaction (CSAT)** and **first-contact resolution (FCR)** metrics by improving communication quality, empathy, and SOP adherence.

1. Business Context and Problem

Over the past six months, Ascend Hosting’s Customer Service Department has experienced declining performance scores across key metrics, including Customer Satisfaction (CSAT) and First Contact Resolution (FCR).

The Front-End Analysis (FEA) identified inconsistent communication quality, limited empathy in customer interactions, and inconsistent use of Standard Operating Procedures (SOPs). These gaps have resulted in longer resolution times, increased escalations, and reduced customer trust.

The Content Discovery Analysis (CDA) validated that an xAPI-enabled scenario-based eLearning course, *Enriching Customer Service*, supported by continuous coaching and performance tracking, would most effectively address these gaps.

2. Talent Development Goal

To **improve customer interaction and satisfaction** by developing agents’ communication, empathy, and problem-solving skills through a blended digital learning and coaching solution that aligns with business performance metrics.

3. Strategic Alignment

<i>BUSINESS OBJECTIVE</i>	<i>LEARNING OUTCOME</i>	<i>MEASUREMENT METHOD</i>
Improve Customer Satisfaction (CSAT) by +10%	Learners demonstrate empathy and tone alignment in simulated interactions.	xAPI interaction data; CSAT post-training survey.
Increase First Contact Resolution (FCR) by +15%	Learners apply structured problem-solving during ticket simulations.	CRM metrics; scenario completion accuracy.
Increase SLA Compliance by +30%	Learners document tickets using SOPs and correct CRM processes.	xAPI completion + ticket audit reports.

Reduce Escalations by 20%	Learners handle challenging customer cases effectively.	Escalation trend data; coaching feedback reports.
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4. Theoretical and Methodological Framework Integration

<i>FRAMEWORK</i>	<i>APPLICATION</i>
Performance-Driven Backward Design	Program designed from end goals backward — outcomes define objectives, content, and assessments.
Cognitivism	Foundational knowledge-building through short, structured microlearning segments.
Constructivism	Scenario-based branching activities simulate authentic customer situations.
Transformative Learning	Reflection and feedback loops foster mindset change and empathy development.
Behaviorism	Reinforcement through coaching, feedback dashboards, and recognition systems.
Connectivism	Continuous peer learning through Slack channels and Confluence hubs.
Agile + SAM Model	Iterative design and development cycles for rapid validation and improvement.
Kirkpatrick Evaluation Framework	Embedded evaluation at every level (Reaction → Results).

5. Program Design and Implementation

Program Overview

<i>PHASE</i>	<i>FOCUS</i>	<i>KEY ACTIVITIES</i>	<i>TOOLS</i>
Phase 1 – Orientation (Define)	Establish awareness of customer experience goals.	Microlearning on CSAT/FCR, interactive video.	LMS, Confluence.
Phase 2 – Skill Development (Align + Design)	Build foundational communication and empathy skills.	Scenario-based simulations, reflective feedback.	Articulate 360, xAPI LRS, Slack discussions.
Phase 3 – Application (Prototype + Iterate)	Apply learned skills in the CRM system and troubleshoot real cases.	Guided CRM walkthroughs, SOP practice, sandbox training.	Sandbox environment, job aids, coaching sessions.
Phase 4 – Reflection & Coaching (Refine)	Reinforce learning through coaching, peer sharing, and reflection.	Reflection logs, feedback dashboards, manager follow-ups.	Slack, Confluence, Teams.
Phase 5 – Evaluation & Continuous Improvement	Review performance data, adjust content and coaching as needed.	xAPI analysis, post-surveys, team debriefs.	LMS analytics, dashboards, LRS reports.

6. Delivery Tools and Digital Ecosystem

<i>TOOLS</i>	<i>PURPOSE</i>
Learning Management System (LMS)	Hosts course modules, assessments, and tracks completion.
Learning Record Store (LRS)	Captures xAPI data on learner interactions and outcomes.
Confluence Hub	Houses SOPs, quick reference guides, and coaching resources.
Slack / Teams	Enables real-time peer collaboration, reflection sharing, and continuous learning dialogue.
CRM Sandbox	Provides simulated ticket-handling environment for procedural practice.
Coaching Dashboard	Displays learner progress, behavioral metrics, and feedback insights.

7. xAPI Tracking Model and Data Integration Framework

Purpose:

To measure behavioral outcomes and connect learner activity to business performance indicators.

ACTION	xAPI STATEMENT EXAMPLE	DATA OUTPUT	USED FOR
Completed module	"Learner <i>completed</i> Customer Experience Foundations."	Completion rate	Training compliance.
Chose response	"Learner <i>chose an empathetic</i> reply in Scenario 2."	Decision trends	Communication quality analysis.
Submitted ticket	"Learner <i>submitted</i> correct CRM entry in simulation."	Procedural accuracy	SLA and FCR correlation.
Reflected	"Learner <i>completed</i> reflection log with self-assessment."	Engagement data	Coaching discussions.
Earned certificate	"Learner <i>earned</i> certification for Enriching Customer Service."	Certification rate	Recognition and motivation.

Data Flow:

LMS → LRS → Dashboard → Manager coaching reports → Business KPIs (CSAT, FCR).

8. Evaluation and Continuous Improvement Plan

<i>KIRKPATRICK LEVEL</i>	<i>EVALUATION FOCUS</i>	<i>MEASUREMENT METHOD</i>	<i>TIMELINE</i>
Level 1 – Reaction	Learner satisfaction, engagement	Post-training surveys, sentiment analysis	Immediately post-course – L&D
Level 2 – Learning	Knowledge and skill gain	Module assessments, xAPI completion data	End of course – LMS tracking
Level 3 – Behavior	Application of skills on the job	Supervisor observation, coaching feedback, LRS analytics	30–90 days post-training – Managers
Level 4 – Results	Business impact (CSAT, FCR, SLA)	Performance dashboards, customer metrics	Quarterly – L&D + CX Analysts
Level 5 – ROI (Optional)	Cost–benefit analysis	Training cost vs. performance gain	Semi-annual – Leadership Review

Continuous Refinement:

- Conduct quarterly reviews using xAPI and performance data.
- Iterate course content using SAM cycles based on learner and manager feedback.
- Update SOP and simulation content as processes evolve.

9. Roles and Responsibilities

<i>ROLE</i>	<i>RESPONSIBILITY</i>
Instructional Designer / Developer	Designs and develops eLearning modules, manages xAPI data structure.
Operations Manager (Client)	Defines performance metrics and provides KPI data.
SMEs (QA Lead, CRM Admin)	Validates scenarios, SOPs, and simulation accuracy.
Coaching Team Leads	Reinforce behavior through guided feedback and dashboards.
Customer Experience Analyst	Evaluates KPI shifts and correlates training outcomes with business data.

10. Strategic Value and Expected Outcomes

- **Skill Transformation:** Agents demonstrate consistent empathy, communication, and procedural mastery.
- **Operational Improvement:** Reduced escalations, increased first-contact resolution, and improved SLA adherence.
- **Cultural Impact:** Strengthened learning culture through peer collaboration and coaching.
- **Data-Driven ROI:** Real-time visibility of learning impact through xAPI and performance dashboards.
- **Sustainability:** Continuous improvement model ensures training evolves with business needs.

11. Example Learning Flow

STAGE	LEARNING FOCUS	METHODOLOGY	TOOLS
Pre-Program	Orientation, metrics overview	Cognitivism	LMS video + quiz
Core Training	Scenarios, decision branching	Constructivism	Storyline + xAPI
Application	CRM simulation and SOP practice	Behaviorism	Sandbox + job aid
Reflection	Empathy and feedback review	Transformative Learning	Reflection log + Confluence
Reinforcement	Peer collaboration, coaching	Connectivism	Slack + dashboards
Evaluation	Performance tracking	Kirkpatrick Levels 1–4	LRS + KPI dashboards