

October 9, 1997

## **NAFTA/TAA Project Customer Satisfaction Training**

### **Work Statement and Tentative Schedule**

The following is a revised proposal to cover project work provided by Melanie Arthur for the North Carolina NAFTA/TAA project. This work statement includes the following four sections:

- I. Planning & Orientation
- II. Training
- III. Other Training Support Options
- IV. Coordination

#### **I. Planning & Orientation**

Services will include participation in planning and orientation meetings to determine project scope, outcomes, goals and work schedules.

In general, it is recommended that work produced as a part of this work statement benefit the full "dislocated workers" and "hiring employers" customer groups, with a specific NAFTA/TAA program feature. In other words, in order to achieve the most far-reaching impact as a result of this project, cover a broad customer base; however, where possible, feature applications regarding the NAFTA/TAA program.

#### **II. Training**

##### **Issues as Identified From Focus Groups**

The following is a list of issues highlighted from the recent focus groups conducted by Sirota and Associates. This list was produced from the outline report and a project team conference call.

- Legislation: Complexity of Program
- Certification/Eligibility
- Coordination with Other Services/Programs
- Service Delivery Procedures, Including Timeframes

- Availability and Dissemination of Information
- Goals
- Measurement of Results
- Services (Training, Case Mgmt., LMI, Job Search)
- Customer Treatment
- Staff Turnover
- Resources

In addition, the following are the customer groups identified: Dislocated Workers, Layoff Employers, Hiring Employers, Schools, Unions, Internal (Federal/Regional/State Central/State Local), Other Programs, and the General Community.

### **Issues Recommended to be Addressed by Training**

From the above list, the following are identified as those most conducive to training topics. Selection of these was based on relative frequency of issue discussion in focus groups, and appropriateness of topic as a somewhat "generic" issue that could be translated into training curriculum suitable for adaptation by all program providers across the country.

- Coordination with Other Services/Programs
- Service Delivery Procedures, Including Timeframes
- Availability and Dissemination of Information
- Services (Training, Case Mgmt., LMI, Job Search)
- Customer Treatment

### **Training by Topic and Audience**

The above list of recommended training issues has been organized into three possible training curricula groups. Each is followed by a description of what audience each topic will be targeted to, and general purposes for the training.

#### **1. Teamwork: The Trade Program Tool for Success**

Increasing the success of the NAFTA/TAA programs depends on improved coordination among all services providers. This may include cross-functional, and cross-agency processes, with diverse program leaders and managers working together toward the same goal. To that

end, these staff need improved skills in working together as a team. A two-day course entitled "Teamwork: The Trade Program Tool for Success" is recommended.

Teams are most effective when each member recognizes and appreciates every team member's strengths; and when they use the team's diversity of strengths as a resource for goal achievement. This session will help ensure that trade program teams do both.

This training is recommended for delivery while the project survey process is underway. Attendees include relevant program planners and decisions makers: program administrators and planners (UI, ES, NAFTA/TAA, JTPA/Title III), monitors, technical assistance staff, ETA national and regional staff, and partners including JTPA/SDA, training and education providers, and others as appropriate. It will be essential to have representatives from all partners attend to maximize the effectiveness of this session.

The focus group issues to be covered by this training are:

- Coordination with Other Services/Programs

The recommended purposes of the training are:

- a. Determine and recognize who is on the team of providers who must work together successfully for NAFTA/TAA to satisfy customers.
- b. Discuss diversity in motivations and preferences...and look at individual motivations and strengths.
- c. Look at how those differences in motivations and strengths come together in the employment and training team.
- d. Talk about how to make the team even more successful in good times; and what to do when internal or external conflict arises.
- e. Identify the linkages, and design optimum ways to work together to ensure seamless dislocated worker program delivery.
- f. Develop action plans for making the team even more successful, including strategies for planning, communication, problem solving and more.
- g. Exchange ideas.

## **2. Trade Programs: Using Customer Surveys and Data for Improved Design and Delivery**

This training will be designed for relevant state program administrators and staff (UI, ES, NAFTA/TAA, JTPA/Title III), program planners, monitors, technical assistance staff, ETA national and regional staff, and program partners including JTPA/SDA, training and education providers, and others as appropriate.

This training is organized as a two-day session with the first day delivered under contract with Sirota and Associates, and the second day developed and delivered under this contract. In general, the first day will be States' opportunity to review their data, dialog with other States' NAFTA/TAA staff, and receive training on utilizing the national survey tool, including topics such as sampling, administration options, data reporting and other customer feedback methods.

The second day of this session will incorporate results from the project surveys, and the introduction of new national program performance measurements. Planning and decision making activities will be designed and delivered to decision makers. Based on the survey results, this will cover program design and service delivery strategies to improve the NAFTA/TAA program effectiveness and customer satisfaction. These decisions can be turned into action, and in turn will impact the content of the training delivered to front-line staff.

The recommended purposes of the second day of this training are listed below.

(Day One to be provided by Sirota and Associates.)

### Day Two

The focus group issues to be covered by this training are:

- Services (Training, Case Mgmt., LMI, Job Search)
  - Coordination with Other Services/Programs
  - Service Delivery Procedures, Including Timeframes
- a. Review the NAFTA/TAA program requirements, and new, voluntary program performance measures; and assess the impact on you, your agency, your partners and your customers.
  - b. Overview the emphasis on customer service and customer satisfaction in Department of Labor directives.

- c. Using a review of customer survey data, plan a targeted approach to dislocated worker program improvements.
- d. Review, and plan for improvements to the flow of service delivery, including timelines, to increase customer satisfaction.
- e. Exchange ideas, brainstorm strategies, and share experiences.

This training incorporates an overview of the recommended topics and modules described below for the front-line staff.

### **3. Tips, Tools and Tactics for Increasing Customer Satisfaction**

Based on survey results, this training will be designed for relevant local office staff, and open to other staff as appropriate, up to 35 participants. "Local office staff" is intended to include all staff involved with trade program service delivery, regardless of the program that pays their salary, for example, staff from UI, ES, the SDA, Community College and training vendors.

The recommended purposes of the two-day training are listed below.

#### Day One

The focus group issues to be covered by this training are:

- Customer Treatment
- Service Delivery Procedures, Including Timeframes
- Availability and Dissemination of Information

The recommended purposes are:

- a. Review the NAFTA/TAA program requirements, and proposed program performance measures; and assess the impact on you, your agency and your customers.
- b. Overview the emphasis on customer service and customer satisfaction in Department of Labor directives.
- c. Discuss the difference between customer service and customer satisfaction and why both are very, very important.

- d. Presentation of relevant customer satisfaction data from the survey results, and ongoing use of surveying techniques for continuous improvement.
- e. Present techniques to use to increase customer satisfaction --- starting tomorrow! (This section will include a presentation of any new strategies, processes or ideas selected for action by the leaders during their training session.)
- f. Exchange ideas and brainstorm strategies.

### Day Two

The focus group issues to be covered by this training are:

- Coordination with Other Services/Programs
- Availability and Dissemination of Information

Lack of coordination and program information were found to be issues during the customer focus groups. These problems contributes to missed participation, confusion, and overall customer dissatisfaction. The purposes of the second day of this course are designed to address this problem, and again will incorporate survey data results into the material:

- a. Present coordination strategies and review implementation plans developed by the leaders during their training.
- b. Discuss private sector outreach techniques, and apply them specifically to improve outreach to dislocated worker program customers (both employers and workers), highlighting the trade programs.
- c. Examine dislocated worker program markets, and review tactics for targeted outreach.
- d. Show how to develop and use effective promotional materials.
- e. Reintroduce and review existing outreach materials.
- f. Exchange ideas, brainstorm strategies, and share experiences.

As with the ES Revitalization customer satisfaction training, these sessions will be organized into “modules” that can be customized both in terms of content and inclusion in additional training that States can present.

### **Training Format**

Each of the above sessions cover approximately twelve hours, or two, full days of training.

For program planners and decision makers, the “Teamwork: The Trade Program Tool for Success” session is recommended as the first session, followed by the “Trade Programs: Using Customer Surveys and Data for Improved Design and Delivery” course. The program planners and decision makers’ sessions should be provided well in advance of the front line staff sessions, to allow time for states to make appropriate changes to the program. Then, front line staff attend the “Tips, Tools and Tactics” course, with these changes introduced.

The decision makers’ sessions (“Teamwork” and “Improved Design and Delivery”) will be delivered in five locations that allow for attendance from each of the 15 participating States. Each of these 15 States will receive one session of the front-line training.

The recommended training delivery component of this proposal covers 45 days of training.

#### **For program planners and decision makers**

- One, two-day session: “Teamwork: The Trade Program Tool for Success,” in each of five locations. (10 days)
- One, two-day session: “Trade Programs: Using Customer Surveys and Data for Improved Design and Delivery” in each of five locations. (5 days under this contract; the first day of each of the five sessions will be presented by Sirota and Associates.)

#### **For front line staff**

One, two-day session: “Tips, Tools and Tactics for Increasing Customer Satisfaction” in each of the 15 pilot States. (30 days)

### **III. Videotape of Training Sessions**

As a means of expanding the access to and delivery of the training, it is recommended to videotape one of the leadership "Trade Programs: Using Customer Surveys and Data for Improved Design and Delivery" training sessions, and one of the "Tips, Tools and Tactics for Increasing Customer Satisfaction" sessions. (Due to the highly individual and team-specific nature of the team building session, it is not recommended for videotaping.)

Final packages of the sessions (estimated at six tapes per session) could be provided to interested or all partners involved with delivering trade program services. Distribution would include copies of the trainee manual that accompanies the training, both in printed and diskette format.

Contracted services would include coordination with a video company for taping and editing, and all production details.

### **IV. Coordination**

All project work will be coordinated with other project contractor(s), CESER and ICESA representatives, North Carolina project representatives, other state and federal partners and stakeholders. This includes use of Sirota & Associates research, customer identification and any other pertinent information, incorporated into both the training as is appropriate.

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NAFTA/TAA Customer Satisfaction Project  
Training Schedule

**State/Program Leaders**

(Two, two-day sessions in five locations to serve all 15 participating states:

Training Session 1 - *Teamwork: The Trade Program Tool for Success*

Training Session 2 - *Trade Programs: Using Customer Surveys and Data for Improved Design and Delivery.\*)*

State/Program Leader Training					
	Training Location	Serving States	<i>Teamwork</i>	<i>Trade Programs</i>	Trainer(s)
1	Raleigh, NC	NC, TN, AL, GA	Nov. 17-18	Dec. 16-17	Arthur, Kronenfeld
2	Philadelphia, PA	PA, NY	Dec. 2-3	Jan. 5-6	Kronenfeld
3	Denver, CO	CA, CO, TX	Dec. 2-3	Jan. 8-9	Hastings
4	Trenton, NJ	FL, IL, NJ	Dec. 4-5	Jan. 15-16	Kronenfeld
5	St. Louis, MO	MO, OH, WA	Dec. 4-5	Jan. 12-13	Hastings

\*Sirota & Associates will deliver the first day of Training Session 2 - *Trade Programs: Using Customer Surveys and Data for Improved Design and Delivery.*

The order and selection of states to group together is based on progress in terms of survey administration.

**Front-line Staff Training**

(One, two-day session in each of the 15 participating states:

Training Session 3 - *Tips and Tools for Customer Satisfaction.*)

Front-line Staff Training			
	Training Location	<i>Tips and Tools</i>	Trainer(s)
1	Raleigh, NC	Jan. 26-27, 1998	Arthur, Hastings
2	Nashville, TN	Jan. 28-29, 1998	Arthur, Kronenfeld
3	Mobile, AL	Feb. 3-4, 1998	Hastings
4	Albany, NY	Feb. 3-4, 1998	Kronenfeld

	<b>Training Location</b>	<b><i>Tips and Tools</i></b>	<b>Trainer(s)</b>
5	Atlanta, GA	Feb. 9-10, 1998	Hastings
6	Philadelphia, PA	Feb. 9-10, 1998	Kronenfeld
7	Trenton, NJ	Feb. 17-18, 1998	Kronenfeld
8	Denver, CO	Feb. 24-25, 1998	Hastings
9	Jacksonville, FL	Feb. 24-25, 1998	Kronenfeld
10	Sacramento, CA	Feb. 26-27, 1998	Hastings
11	Austin, TX	Mar. 3-4, 1998	Hastings
12	Chicago, IL	Mar. 3-4, 1998	Kronenfeld
13	Seattle, WA	Mar. 10-11	Kronenfeld
14	St. Louis, MO	Mar. 16-17, 1998	Hastings
15	Columbus, OH	Mar. 24-25, 1998	Hastings