eLearning Course/Product Name: [The Coop: New Employee Onboarding](#)

Client: Whitney Feltrop on behalf of The Coop, Derby, KS and Wichita, KS

Description: This onboarding training is designed to equip new employees with the knowledge and skills they need to excel as a barista at The Coop. Over the course of four modules, new hires will delve into the art of espresso, explore the world of coffee origins, master milk texturing techniques, learn signature drink recipes, and immerse themselves in the art of exceptional customer service.

Developer Name: Jennifer Fritz **Date:** December 8, 2023 **Product:** [Articulate Rise 360](#)

Course Learning Outcomes:

By the end of this course, new employees will be able to...
   I.   Apply company value statements to customer interactions. (M1 & M4)
  II.   Articulate the types and differences of coffee and espresso drinks to customers. (M2)
 III.   Demonstrate a working knowledge of the Coop's menu and syrup combinations. (M3)
  IV.   Determine appropriate drink recommendations for customers based on preferences and adequate drink-menu knowledge. (M3)
   V.   State and practice appropriate, relevant food safety measures. (M3)
  VI.   Apply customer service best practices in customer interactions. (M1 & M4)
 VII.   Employ proper problem resolution skills, utilizing de-escalation techniques as appropriate. (M4)

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Special Note:

  After completing two interviews, the needs and training analysis, and beginning production on a mentoring program, the operations manager went AWOL, and did not return any of my attempts at contact or share any information I requested. Because of this, I was unable to complete my initial mentorship model as it required far too much input from the manager and SME. Due to these roadblocks, I pivoted the focus of the training from solely customer service based to a more comprehensive onboarding program that all new employees could benefit from. It addressed many of the customer service problems I observed, but in a different way than what was originally planned. I understand that as a result, some of my work does not follow what I originally planned. If you require further explanation, please let me know and I will be more than happy to explain. I have the original planning document that I created with Whitney, which I shared with her, but was never responded to or interacted with. I consulted with a friend who was a barista over what training she wished she had received when she was hired, and what training she went through that was effective or ineffective.

Training Needs Analysis:

I. Interview with Stakeholders Worksheet

Interviewee: Whitney D., Operations Manager   **Date:** September 23, 2023

Question 1: What problem are you going to address with the employee training program? Why do you think the training is necessary?

The problem she would like addressed has to do with customer satisfaction rates, upselling, and giving better product recommendations to new and returning customers. The shop's customer service ratings are currently "okay" according to Whitney, but she feels that they could be improved with some coaching or training on customer service and how to determine the needs of the customer.

Question 2: How is this problem being addressed now?

Additional training and coaching from the operations manager, but she wants a more formalized approach where she doesn't have to be present as a coach but can continue working on administrative tasks behind the scenes. Whitney mentions that she comes out front to help when she can, but having another body in the space is sometimes more hurtful than helpful, as it is a small shop area, especially where the drink preparation takes place.

Question 3: How are employees performing? What results are being achieved?

Employees are performing well, she reports, but could be doing better. Currently, their exit surveys show that customers report an average of 67% satisfaction with their service (based on a five smiley rating screen that customers fill out after checkout to earn their reward points). One thing that she has seen as a weakness is the baristas' abilities to make better recommendations for customers, but that she has noticed this more through tracking drink sales, not necessarily the customer satisfaction surveys.

Question 4: What should be happening (as opposed to the current performance)? What are the goals?

Her goal is that all customers are greeted upon entrance in a way that seems genuine and not just dismissive, employees will make conversation to determine the wants and needs of the customer, use good customer service to build relationships to encourage return customers, properly recommend new drinks to improve seasonal drink sales and emphasize/introduce new products.

Question 5: What prevents the goals from being achieved?
A- Is the gap between the current and desired performance caused by knowledge, skills, or attitude shortfalls?

Whitney thinks that the current gap is caused by a lack of skills and some attitude changes that are needed. She admits that she has not given employees specific training on how to interact with customers, and leaves that

mostly up to the mentor employees during the initial onboarding training. These employees were once trained by Whitney herself, but as the company has expanded over the past few years, she has been less hands-on and more dependent on the mentorship provided by existing employees.

B- How much of the gap is caused by the environment, a process, or a technical factor?

The gap seems to be caused by a variety of things- the physical environment is very cramped, with moderate to poor visibility of customers from the barista's point of view. Customers have limited seating indoors, and the outdoor seating is not easily accessible by the baristas. Contributing to the problem is the fact that there are no set onboarding materials except for a checklist that mentor employees are expected to complete during the first few weeks of onboarding and training. This is then filed in the employee's file upon completion and signature but isn't assessed or reviewed by anyone else. This has led to inconsistencies in the training of new hires, who then in turn can become a mentor employee, and leads to more inconsistencies.

Question 6: What is the target audience for the training?

The Coop has around 20 part time employees, most of which are high schoolers or recent graduates. A few are young professionals looking to make extra income in their free time. Almost all of them live within a 10-mile radius of the city in which the store is located. Their positions are listed as sales/barista, and all employees are trained to be able to fulfill all job requirements. The preferred style of learning is unknown, but the owner noted that their scheduling and communication software is digital and that it receives a pretty good response from the employees. She also notes that a lot of her employees seem to enjoy hands-on learning, too.

Question 7: Have they received any training in the past?

Yes- all new employees receive informal initial training and must pass a mentorship period, where they have an employee mentor to help them learn to stock shelves properly, maintain cleanliness, and craft drinks. This mentoring takes place for about a month, depending on how often the employee works, and may not be with the same mentor employee for the duration. There is a checklist that is completed throughout the process, but no quality monitoring or other assessments are done once it has been marked complete and added to the employee's file. Mentor employees do not receive financial compensation for their mentorship, as it is part of their job.

Question 8: Have you considered anything other than training solutions to address the problem?

She reports that she has done some coaching on the spot, but it has been spotty and based on when she has time available to do so and on obvious issues (like incorrect drink preparation or issues with cleaning/stocking). Overall, she seems supportive of her employees, but she would really like customer satisfaction to be higher.

II. Interview with Employees Worksheet

Interviewee: Dalila S., Sales/Barista　　　　　　　　　　**Date:** September 25, 2023

Question 1: What are the main knowledge and skills required for your job?

　　She states that the skills are mostly knowing how to interact with people, perform basic cleaning tasks, restocking shelves at the end of the day, but most of her day is spent preparing online/mobile and in-person drink orders. She reports that time management is also important and being able to work under pressure and deal with high-maintenance customers.

Question 2: What is the most challenging part of your job?

　　Dalila reports that the hardest part of her day is during the busy times, when customers get frustrated waiting in line and the store gets cramped. There isn't a lot of space for the line, and when the line backs up, it blocks the shelves and refrigerators, which annoys customers. The drinks also are hand- crafted and sometimes can take a few minutes to make, especially if someone orders multiple drinks at a time but doesn't have multiple people in line. There are only two employees working at a time, regardless of the time of day, and that often means that both are required to make drinks, leaving no one to help customers shopping or to form relationships/have conversations.

Question 3: Can you list any factors that you feel are preventing you from reaching the maximum results in your job?

　　The size of the store, which she realizes can't be changed now. She also mentioned that how well a shift goes often depends on who you are working with- some baristas are far more efficient and speedier than others, and the ones still in high school often don't seem to know how to handle customer complaints or frustrations. When I asked her about selling seasonal drinks and new products, she says that most customers already know what they want, and if there's a line waiting, she doesn't feel like she has enough time to make recommendations without irritating the rest of the line. With the recent addition of mobile and online ordering, it has made it frustrating to customers because one barista must work on pre-orders while only one is then available to make drinks for in-store customers.

Question 4: What would help you to perform your job successfully?

　　Customer service practice or coaching would be nice, but also an organized drink recipe book would help. The recipes are not currently organized in any efficient way and are found in different places behind the counter. New and seasonal products are difficult to remember because they are only around for a little while, and recipes change on occasion. Dalila also mentioned that the mentoring she received as part of her training was very basic

and just to get it done. She didn't feel like it was useful for the people- based aspects of her job, that it just taught her how to complete the tasks she needs to during the day.

Question 5: Do you think that training could help you to be more efficient at your job? If so, what kind?
She says that yes, she does think that training could help, but she thinks most of the baristas don't need help completing tasks, just learning how they are supposed to make time to form relationships with customers in such a short amount of time, especially in the busy times where other customers can end up getting frustrated with chit-chat. She said that dealing with upset customers makes her uncomfortable, and that she knows some past employees have gotten "easier" jobs doing something else.

Question 6: Have you received any training in the past? If so:
A- What kind? (List any courses and workshops you attended while working for the company.)
Just the initial onboarding training, and then some verbal instructions on how to be a mentor employee when she was picked to be one.
B- Did any of the training help with your job results? How?
As mentioned earlier, she doesn't feel like the initial training is good enough at preparing baristas for how to handle customers. It does fine at teaching them what tasks they need to accomplish daily and how to clean the store, but it doesn't deal with how to interact with people. She also mentioned that the drink training is alright, but it would be nice to have more consistent expectations and recipes.

III. Gap Analysis

Focus Area:
I believe that an improved employee onboarding process would help new hires in their acclimatization and training, a consistent approach to mentoring new hires is needed, as well as some customer service practice in a way that minimizes stress (coaching with real customers has not proven efficient). After speaking with the owner, she said that new hires do not happen "often" and that, at this point, she would like to focus on the customer service approach and recommendations.

Goals:
1. Develop a consistent mentorship program for new hires.
2. Develop assessment to evaluate the effectiveness of the mentorship/onboarding process.

Current State: Customer satisfaction rates are below 70%, and employees report feeling unprepared. Though there isn't an employee data collection, that could be developed to learn more about why employees feel unprepared to deal with customers.

Desired State: The owner would like customer satisfaction rates to be at least 80%, and to have a more welcoming, genuine environment in the store. Employees would like better customer service training and a more organized recipe book.

Identified Gap: The gap in number is 10%, but also the employees would like to feel more prepared to deal with customers and how to streamline their process to make things faster.

Effect of Gap: The effect for customers means that they are feeling ignored (when a barista is preparing mobile orders) and/or undervalued. Employees feel that pressure and are unsure how to change it or improve the atmosphere. Drink sales for new products and seasonal drinks are low because of lack of barista time/willingness to give recommendations to customers.
 1. Develop a scenario-based training experience that allows the baristas to practice good customer service in a low-pressure environment.
2. Increase customer satisfaction to at least 80% by building relationships and making personalized recommendations.
3. Organize the drink recipes to decrease customer wait time.

IV. Needs Assessment Checklist
- ☑ You've conducted an initial interview with the client.
- ☑ You've analyzed the present situation in the company.
- ☑ You've got credible information about the current performance of the employees. You've explored the gap between the present situation and the desired outcome. You've established clear and measurable goals.
- ☑ You've found the root cause of the existing performance gap.
- ☑ You've made sure that all parties involved agree about the cause.
- ☑ You've analyzed all the plausible alternative ways to reach the same goal.

Diversity and Accessibility Plan

I. Diversity
    A. Language Inclusivity
        1. My language will support English, with the option of eventual Spanish rollout. None of the employees at the Coop are ESOL learners currently, so there is time to expand the language offerings in the future, with no immediate need. Use of idioms and cultural references will be avoided to ensure that content can be understood by all English- speaking learners, not just American ones.
    B. Cultural Sensitivity
        1. The company I am designing for is domestic only, and all learners (currently) are native English speakers. That being said, I plan on using plain, accessible language that all learners can understand.
    C. Photo and Video Diversity
        1. The photos and images used in my training will represent a wide variety of learners regarding physical abilities, races/ethnicities, religious backgrounds, age, gender identity, and sexual orientation. My goal is that every learner will be able to identify with the imagery shown in the learning multiple times.
    D. Iconography and Graphics
        1. Iconography will be simple and easy to understand, with a help option available to explain the meaning of different icons if a learner chooses. If I can figure out how to accomplish it, I would also like to have descriptions that pop up when your mouse hovers over an icon (if hovering over a house icon, a pop up near the mouse would say home, for example).
        2. I will not be using colors to represent meaning or significance. Colors will be accenting colors from the company guidelines only and will not hold their own significance or meaning aside from aesthetic.
    E. Religious Diversity
        1. I would like to include imagery from different religious backgrounds as much as possible, which is included in my photo and video diversity section. As this is a training on customer service in a coffee shop, I don't have any planned content that addresses religion specifically, and any culturally insensitive language will be avoided.
    F. Age Diversity
        1. My primary age group is young adults, but a few of the employees are in the mid-life range. Because of this, I will not take for granted that my employees are comfortable using and

experimenting with technology, and will provide adequate help options or guides to promote ease-of-use.
2. Imagery of varying ages will represent all learners and customers, so that all are represented and feel seen.
3. References to pop culture or other age-dependent references will be avoided.

II. Accessibility
A. Hearing Inclusivity
1. All audio will have transcripts available.
2. All audio and video will have closed captions available.
3. All video and audio will have volume control and play/pause features.

B. Visual Inclusivity
1. Color will only be used in the online modules for aesthetic purposes, not to convey meaning or content.
2. Content will be run through a color-contrast and color-blindness checker before use to ensure adequate accessibility,
3. Product will be evaluated for ease of use with a screen-reader like VoiceOver to ensure that it can be understood.
4. All images will contain alt tags, or null tags when appropriate.
5. Proper headings and paragraph types will be used so that screen readers function properly.
6. Any graphics used will not convey content/information unless accessible by a screen reader (like graphs, etc.).

C. Physical/Motor Inclusivity
1. The content will be able to be viewed on a variety of devices, including desktop computer, tablet, and phone.
2. The activities will be able to be completed using simple interactions.
3. Navigation will be possible both with and without a mouse.

D. Learning/Cognitive Inclusivity
1. All videos will have play/pause/go back/go forward options to support learning for all ability levels.
2. No activities will be timed or have restricted tries to allow for a relaxed and low-pressure learning environment and experience.
3. Language will be plain and understandable, avoiding excessively technical or advanced vocabulary, and providing definitions and scaffolding when unavoidable.
4. Activities and videos will be able to be accessed when needed and can be repeated or replayed as desired/needed.

5. Fonts, colors, graphics, and images used will be non-distracting and only used to enhance learning, not as a distraction.
6. Fonts chosen will be easy to read, and script fonts will be avoided.

E. Multiple Means of Access
1. Both captions and transcripts will be available for videos and audio sources.
2. The product will be accessible on a variety of devices including desktop computers, tablets, and phones.
3. The product will be interactive both via touch screen and with a trackpad/mouse.

Learner Profile:

Background

The Coop is a small, locally owned and operated coffee shop and collaborative sales space. The founder's original vision was to transform a largely-abandoned gas station into a community space where local artists, bakers, chefs, and small business owners would have a place to sell their products. The operations manager was originally a barista at the Coffee Shop, another locally owned and operated coffee shop (which now manages the Coop). After going to college to get a degree in business marketing, she worked for a few years before hearing of the founder's vision for the Coop. With the help of the Coffee Shop's owner (who she had been working as a barista with for many years now), she jumped onboard. Over time, her team has taken over daily operations of the Coop, which has now freed the founder to open a new location nearby.

Audience

The learners involved in this training are mostly high school aged students to young professionals. Most are under the age of 30, and all are currently pursuing degrees or have already achieved them. Nearly all employees are women, with just a small percentage of men. They are very technologically savvy and do not seem to struggle with operating the POS which is digital. Many of the employees work regular shifts after school, but not all. Some of the employees pick up shifts sporadically, when they have time. The primary audience for the first rollout of this product will be the employees chosen to be mentors, which has been an unstructured program until now. Mentors were chosen based on their experience, employee success, and availability.

Baseline Data

The following data was collected during observations (as a customer in the shop) during "slow" times:
- Customers are often greeted with a simple, "Hello" after they have approached the counter (93% of interactions), and conversation was limited, even with chatty customers.
- Customers who do not directly head to the counter (ones browsing products) are rarely greeted at all, until they check out (87% of interactions).
- Product recommendations were inconsistent and very basic, and only occurred when requested by the customer.
- There is a board where customers can post their own recommendations for other customers.
- When asked for assistance, customers were directed where to go instead of shown
- Many questions that customers had about products were answered with "I'm not 100% sure," or similar comments (90% of responses).

- When customers were not present in-store or were sitting at the counter working, employees often sat at a small table tucked in the back corner of the shop, interacting with each other but not customers.
- Orders were only repeated back to the customer 7% of the time.
- Employees appeared to have good rapport and relationships with each other, with no negative interactions or comments observed, and conversation flowing easily.
- Visibility of the retail area is very limited no matter where you stand or sit, and space is tight if there are more than a few people walking the floor.
- Customer de-escalation techniques were employed poorly and minimally in the one negative customer interaction I observed. Following prescribed steps would improve this, both for the employees and the customer.

Learning Event

Desired Learning

The operations manager would like their new employees to implement the following knowledge, skills, and behavior:

Knowledge: Coop values, types of coffee (origins and flavor profiles), espresso creation process, milk texturing process, types of espresso drinks (and their make-up), Coop menu and syrups, relevant food-safety regulations for Kansas, customer service basics, problem resolution and de-escalation techniques

Skills: greeting customers, reading body language, taking accurate orders, fostering customer relationships, problem resolution, and making personalized recommendations based on communicated preferences

Behavior: carry out the tasks required to facilitate excellent customer service interactions and encourage customers to return, make appropriate, personalized drink recommendations

Course Learning Outcomes:

By the end of this course, new employees will be able to…

VIII. Apply company value statements to customer interactions. (M1 & M4)
IX. Articulate the types and differences of coffee and espresso drinks to customers. (M2)
X. Determine appropriate drink recommendations for customers based on preferences and adequate drink-menu knowledge. (M3)
XI. State and practice appropriate, relevant food safety measures. (M3)
XII. Apply customer service best practices and company values in customer interactions. (M1 & M4)
XIII. Employees demonstrate proper problem resolution skills, utilizing de-escalation techniques as appropriate. (M4)

Learning Environment
Length: Micro-learnings up to 5 minutes for each learning activity (multiple activities per module)
Format: Digital eLearning (on iPad or phone, unless employee provides own laptop)
Time: New employee training to occur during paid (up to 30 minute) sessions before shift start

Limiting Factors
Time: Manager agreed to longer sessions (up to 30 minutes) for new employees
Financial Factors: Free
Consistency: Need to be able to track employee completion so that employees can work through the micro-learnings systematically (but flexibly), regardless of their scheduling

Module	C.L.O.s	Module Learning Outcomes	Instructional Activities, Materials & Assessments
M1a: The Coop Family →**Welcome to the Coop**	**CLO I**	**1a.1** Locate and paraphrase the main topics of onboarding modules.	Welcome Message Introduction/What to Expect Module Topics List Welcome Conclusion
M1b: The Coop Family →**Our Values**	**CLO I**	**1b.1** Paraphrase/summarize the mission statement of The Coop. **1b.2** Paraphrase/Summarize the core values of The Coop.	Mission Statement Core Values List Core Values Definitions Customer Review
M2a: Coffee Connoisseurs →**Exploring Coffee Origins**	**CLO II**	**2a.1** Correlate coffee flavor profiles (fruity, nutty, smoky, etc.) with their regional origins.	Relevance Setting Introduction to Coffee Origins Origins of Coffee Map (Ethiopia, Latin America, Africa, and Asia & Oceania) → Interactive image graphic Coffee Blends Content Application Matching Country to Flavor Profile → Matching assessment
M2b: Coffee Connoisseurs →**The Art of Espresso**	**CLO II**	**2b.1** Break down the process of creating an espresso shot, from the coffee sourcing, to the final pull.	Relevance Setting Introduction to Espresso 5-Step Process (from beans to brew) → Interactive steps graphic Espresso Summary Extraction Quick Assessment → Multiple selection assessment
M2c: Coffee Connoisseurs →**Mastering Milk Texturing**	**CLO II**	**2c.1** Identify the steps in the milk texturing process. **2c.2** Match common milk foam issues with their causes.	Relevance Setting Introduction to Milk Foam How to get silky milk → Tutorial video Milk Texturing Troubleshooting → 3 Photo slideshow Milk Texturing Problem/Solution → Matching assessment Milk Texturing Summary
M2d: Coffee Connoisseurs →**Espresso Drinks**	**CLO II**	**2d.1** Categorize common espresso drinks into their types based on their contents.	Relevance Setting Introduction to drink types Espresso Drink Types

			-Images with recipe -Description and caption -Red Eye, Black Eye, Dead Eye, Espresso (ristretto and lungo), Americano, Macchiato, Flat White, Cappuccino, Lattes, Mocha Let's Practice: Espresso Drinks→ Sorting assessment
M3a: Signature Drink Recipes →**Learn the Menu**	**CLO III**	**3a.1** Locate key areas of the most recent Coop menu.	Introduction Coop Menu Interactive → Website link Coop Menu → Interactive image with hot spots
M3b: Signature Drink Recipes →**Specialty Syrups**	**CLO III**	**3b.1** Sort syrups into their relevant categories.	Introduction Syrup types Relevance Syrup and recipe list → file download (never received) Sorting activity based on recipes → Card sort (never received enough information to create/complete)
M3c: Signature Drink Recipes →**Crafting the Perfect Cup**	**CLOs III, IV**	**3c.1** Deduce appropriate recommendations for drinks based on customer preferences. **3c.2** Investigate customer preferences by asking effective questions	Introduction Relevance setting Information needed list Making recommendations practice → Scenario Menu Master knowledge check → Recommendation sort Time recommendation check → Multiple choice question Preference/recommendation match → Matching assessment
M3d: Signature Drink Recipes →**Food Safety Regulations**	**CLO V**	**3d.1** Articulate and apply relevant state food safety regulations	Disclaimer Introduction Relevant Standards (health and hygiene, temperature control, cleaning and sanitizing, pest control, food and ingredients, labeling and packaging, food handling) Descriptions and relevance → Expanding tabs Additional resources → KSDA website → Website link Additional resources → USFDA website → Website link Updated KDA food code → File download Health and Hygiene Handbook → File download Quick Check → Multiple choice questions

M4a: Exceptional Customer Service →**The Essence of Customer Service**	**CLOs IV & VI**	**4a.1** Recall customer service best practices **4a.2** Integrate customer service best practices into customer interactions	Opening scenario (non-example) → scenario Introduction and relevance setting Customer service best practices → expanding tabs Reminder Let's Practice → Multiple choice assessment
M4b: Exceptional Customer Service →**Navigating Challenges with Grace**	**CLOs VI & VII**	**4b.1** Employ problem resolution process to solve customer issues respectfully **4b.2** Integrate de-escalation techniques with the problem resolution process when needed	Introduction to de-escalation Relevance setting Understanding customer dissatisfaction 6-Step Process Caution De-Escalation and Problem solving scenario → scenario Summary
M4c: Exceptional Customer Service →**Mastering Order-Taking**	**CLOs IV & VI**	**4c.1** Ask appropriate questions to refine orders (hot or cold, size, syrups, etc.) **4c.2** Order the steps to taking an order accurately	Introduction Relevance setting Parts of order taking → expanding tabs Advanced Techniques → 4 image gallery with captions Let's Practice Order taking → Matching
M4d: Exceptional Customer Service →**Conclusion**	**All CLOs**	**4d.1** Summarize the main topics of onboarding modules.	Onboarding Summary → Sliding gallery Conclusion and Welcome