

The Learning Trifecta



Participant Materials



Scenario 1: Citrus Sunshine Boost

Meet Tyler – an Instructional Designer at ‘Full Sun Growers’ – a regional nursery who relies on customer connections to compete with the big box stores. Recently, sales of their house brand fertilizer, “Citrus Sunshine Boost”, have dipped. In this scenario, Tyler meets with brand manager Bianca to discuss training for their retail team members.

[Tyler] Hi Bianca, it's great to see you. How was your weekend? Relaxing I hope.

[Bianca] Anything but! It was my daughter's 8th birthday party – we held it at a roller rink and the kids absolutely loved it! How about you?

[Tyler] That sounds fun! I haven't been roller skating

in forever. I actually went hiking with my family. It was refreshing to be out in nature. And speaking of nature, I hear you need our help with our sales staff making more natural cross-sales pitches.

[Bianca] Too funny – nice segue Tyler. But yeah, we'd like some help

recovering some lost sales.

[Tyler] I understand that we're here to talk about the Citrus Sunshine Boost. Could you start by giving me an overview of the current situation?

[Bianca] Citrus Sunshine Boost is our house branded citrus fertilizer. We sell it year long alongside our citrus trees. During peak citrus sales, we feature it at the point-of-sale as an add-on. It was doing well, but after our branding refresh last year, sales dropped significantly. We found that our employees weren't following the Sell More Grow More program effectively.

[Tyler] I see. Can you tell me more about Sell More Grow More?

[Bianca] Yep. It's a program designed to promote add-ons at the Point-of-Sale. Our team members are trained to show interest in the purchase, engage the customer with a question, such as what kind of fertilizer they use, then suggest an add-on. We usually have 3 to 4 items at the point of sale to offer, based on what's in the customer's cart and we

rotate those products every few weeks to keep them fresh. The program is so important to our bottom line Tyler, it's what helps us compete with the big box stores. When our stores do well, sales from Sell More Grow More is what pays for employee benefits and funds bonuses.

[Tyler] I see. That's a huge deal. What do you think is causing the drop in adherence to the program?

[Bianca] Well, employees often forget to suggest add-ons, they don't see the benefit, or they need more practice in engaging with customers naturally.

[Tyler] Interesting. Can you elaborate on why employees might forget to suggest add-ons?

[Bianca] Sometimes they are just focused on completing the sale quickly and might overlook the opportunity to suggest an add-on.

[Tyler] That makes sense. Do you think they understand the benefits of suggesting add-ons?

[Bianca] We could do a better job here in explaining how they drive revenue. We try not to overwhelm them with back-office details so they might not fully see how they contribute to our success.

[Tyler] Got it. So, what specific business result are you aiming for with this training?

[Bianca] I'd like to see sales get back to where they were and then some.

[Tyler] Where were they before?

[Bianca] For the citrus fertilizer category they were at 18%. They've dropped to under 10.

[Tyler] OK. So you want to get back to 18%?

[Bianca] That'd be great.

[Tyler] And you mentioned surpassing those numbers?

[Bianca] Yeah. In the next 8 months I'm aiming for Citrus Sunshine Boost to represent 25% of our citrus fertilizer sales.

[Tyler] That's a clear goal. What do you think is the main barrier to achieving this?

[Bianca] Employees need to consistently follow the Sell More Grow More steps, but they seem to struggle with it.

[Tyler] Understood. Can you give me an example of how an employee might struggle with this?

[Bianca] They might not know how to naturally bring up the add-on or feel uncomfortable suggesting it.

[Tyler] Got it. Thanks for sharing that, Bianca. This gives me a good starting point. So it sounds like we're looking to refresh our training on how to utilize Sell More Grow More?

[Bianca] Exactly. We're expecting citrus sales to pick up in 8 weeks so this is a good time to refresh on the Sell More Program, featuring the talking points that will improve Citrus Sunshine sales.

[Tyler] Tell me a bit more about the Program.

[Bianca] Each day, when they open their register, team members need to check that the point of sale is neat and prominently displays the product. Then, as soon as they see a citrus tree in the customer's cart, I want them to identify it as a sales opportunity and engage the customer. For customers that show an interest, they pick up the product, show the product to the customer, and mention a benefit of a quality fertilizer. Then, ask for the sale.

[Tyler] Got it. This sounds like a slam dunk. Do we have any tip sheets that go over those benefits?



Group Activity

Scenario 1: Citrus Sunshine Boost

Use the Do Sheet below to complete the activity when introduced by your Facilitator. For this activity, you will skip “The Vision” and “The Gap”



E-Learning Uncovered

The End Result

What business outcome should increase or decrease?



The Vision

What's the dream state? What would it look like if everyone did what they need to do?



The Gap

What's the difference between the current state and the dream state? Why does that gap exist?



The DO List

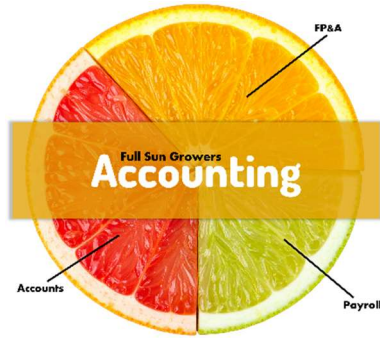
What on-the-job actions will give you the end result?

Off-Limits

- Know
- Understand
- Be aware
- Learn

Caution

- List
- Describe
- Define
- Explain



Scenario 2: Expense Reports

Full Sun Growers' commercial sales team are some of the best relationship builders. And some of the worst at submitting expense reports. In this scenario, Tyler meets with Giselle, a no-nonsense accounting manager who came to the meeting ready to make things right.

[Tyler] Hi Giselle, thanks for taking the time to meet with me today. How are you doing?

[Giselle] Busy, as always. Thanks for the call. We have a serious issue with the field sales team and their expense reports. They're submitting their expense reports late and with numerous errors. This is causing a significant strain on the accounting team. We need to address this immediately.

[Tyler] I see. What specific improvements are you looking for?

[Giselle] Ideally, I want expense reports submitted within 3 days of incurring an expense, but realistically, I'd be happy with 10 days after they return from a business trip.

[Tyler] Got it. So it sounds like an issue with timeliness.

[Giselle] Right. In terms of accuracy, I want 100%, but I'd settle for reducing send-backs to under 18%. Right now, it's between 30-40%.

[Tyler] That sounds like a reasonable goal. What are the main issues with the current submissions?

[Giselle] The reports are often late, filled with errors, and missing receipts. The sales reps know how to navigate the expense report system, but they need to understand the expectations and the importance of accuracy.

[Tyler] Understood - Can you give me some examples of the types of errors you're seeing?

[Giselle] Oh, where do I start? Incorrect amounts, missing dates, expenses categorized incorrectly... It's a mess.

[Tyler] Is that unique to the sales team?

[Giselle] No, data entry is an issue with the whole company and they're easy to fix. The big problem is with receipts. It's a huge issue with sales. They know they need to submit receipts for any expense over \$50, but it keeps happening.

[Tyler] That does sound frustrating. Do you think they understand the impact these errors have on the accounting team?

[Giselle] Honestly, I don't think they do. They probably see it as just another task to complete, without realizing the extra work it creates for us. We end up spending hours chasing down missing information and correcting mistakes.

[Tyler] I see. So, part of the training should focus on helping them understand the bigger picture and the impact of their actions?

[Giselle] Exactly. They need to know that their accuracy and timeliness directly affect our ability to close the books on time and manage the company's finances effectively.

[Tyler] Got it. What about motivation? Do you think there's a lack of motivation to complete these reports accurately and on time?

[Giselle] Possibly. They might see it as a low-priority task compared to their sales targets. But it's not just about motivation; it's about setting clear expectations and holding them accountable.

[Tyler] Understood - so we need to make sure the training emphasizes the importance of these reports and sets clear expectations for on-time submissions and accuracy.

[Giselle] Yes, and we need to be very clear about the consequences of not meeting these expectations. If they know there will be follow-up and accountability, they might take it more seriously.

[Tyler] That makes sense. Can you show me some examples of the errors you're dealing with?

[Giselle] Sure. Here's one from Terri. She submitted a \$500 dinner with no receipt, a rental car receipt that's too crumpled to read, and about \$150 in miscellaneous charges with no breakdown.

[Tyler] Wow, that's quite a mess. How do you handle situations like this?

[Giselle] We have to follow up with Terri, ask for the missing receipts, and sometimes even escalate it to her manager. It's time-consuming and frustrating. Here's one from a sales rep in Oregon. He submitted a picture of himself holding a piece of paper that says "I lost the receipt." It's ridiculous.

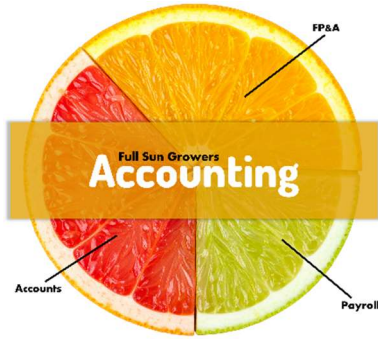
[Tyler] That's unbelievable. So, we need to make sure they understand the proper procedure for missing receipts, like completing an affidavit.

[Giselle] Exactly. that affidavit is absolutely required for missing receipts over \$50. They need to follow the rules and submit the required documentation.

[Tyler] Got it. This gives me a clear picture of what we need to focus on. Is there anything else you'd like to add?

[Giselle] No, that's it. Thanks for listening Tyler, I know you'll get the message across. Just make sure they understand the importance of these actions and the impact on the accounting team.


[Tyler] Will do. Thanks for your time, Giselle. I'll get started on this right away.



Group Activity

Scenario 2: Expense Reports


Use the Do Sheet below to complete the activity when introduced by your Facilitator. For this activity, you will skip “The Vision” and “The Gap”



E-Learning Uncovered

The End Result

What business outcome should increase or decrease?




The DO List

What on-the-job actions will give you the end result?



The Vision

What's the dream state? What would it look like if everyone did what they need to do?



The Gap

What's the difference between the current state and the dream state? Why does that gap exist?

- Off-Limits**
- Know
 - Understand
 - Be aware
 - Learn

- Caution**
- List
 - Describe
 - Define
 - Explain



Scenario 3: Garden of Excellence

When Full Sun Growers encountered an inadvertent challenge when implementing changes at their contact center. In this scenario, Tyler is meeting with Customer Service Manager Alex to discuss how a learning solution can turn around their NPS.

[Tyler] Alex - it's so good to see you. How are you and the little ones?

[Alex] Hi Tyler, things are good. Just busy with the kids. How's your family?

[Tyler] They're great. My twins are wrapping up 2nd grade and let me tell you, it's a tale of two cities. One can't wait to go, and the other is in it for recess. But uh, what's going on with the customer service team? I'm hearing great things and... well, some not so great.

[Alex] You heard right. We've been dealing with a lot of customer complaints lately, and it's taking a toll on the team.

[Tyler] They're really feeling the pressure. Can you give me an overview of the current situation?

[Alex] Sure. Our NPS for interactions in the contact center has dropped from 88 to 82 over the last year.

[Tyler] Ouch. What caused that 6 point drop?

[Alex] About 4 years ago we introduced "Garden of Excellence". It's a playbook of strategies for delighting customers, whether they're happy and excited, or whether they're frustrated or confused. When we join the model with motivated employees, our customers are happy no matter the outcome. Our supervisors were great at coaching to the playbook. For a long time, it worked great.

[Tyler] OK.

[Alex] But then earlier this year, we dropped metrics like handling time and quality assurance reviews. Instead, we encouraged team members to just focus on the customer. It became all about the NPS.

[Tyler] So the focus shifted to NPS, then the NPS fell?

[Alex] Exactly. Looking back, dropping those metrics was a leadership fail. NPS alone tells us the customer's impression of the call overall, but it doesn't tell us why the call was a success or not. Without quality reviews to coach to, our supervisors lost their strategy and our team members lost their motivation to perform.

[Tyler] Do we still follow the Garden of Excellence model?

[Alex] We do. Or we should. It's all become a bit fuzzy and I need to work with our supervisors to come up with a coaching strategy. Our biggest opportunity right now has to do with calls we call 'handoffs'.

[Tyler] Can you tell me what a handoff entails?

[Alex] Absolutely. When the contact center team answers basic questions like store hours or pricing, we call those Tier 1 questions. They're also trained to answer basic plant care questions about lawn maintenance, proper watering, and pest management. Those are what we call Tier 2 questions. When it gets to more complex questions, we hand the call off to our Tier 3 team.

[Tyler] Tier 3 – is that the retail team that helps out on the phones?

[Alex] You know it. Every store has experts with botany and agriculture experience. Ideally, they can take the handoff on-the-spot. If no one from the team is available, the contact center files a ticket and a Tier 3 team member gets back to the customer, either by phone or email.

[Tyler] Do we lose customer satisfaction because of the handoff?

[Alex] Actually, we don't. Generally, customers appreciate access to free advice. But when we miss the mark on the handoff, it all falls apart. My reps disengage once they discover the call is a handoff. Sometimes that means they stop asking questions and miss an opportunity to solve the question themselves. Other times, they just go cold. You can hear it in their voices.

[Tyler] Why do you think that happens?

[Alex] My team gets a mix of calls from easy questions to happy customers looking for advice. But a lot of callers are experiencing a customer service issue. My team handles those issues and it takes a toll. They get excited when a plant care question comes in because it's an opportunity to be helpful and share in a positive experience. So when they determine the call is a handoff, that excitement is deflated. They lose ownership of the call and forget to ask questions that our Tier 3 team might need. Questions like the age of a

plant or the history of pests. Sometimes, they forget to get good contact details, or they convey inaccurate expectations about when the customer should hear back.

[Tyler] When should the caller hear back?

[Alex] That's when critical thinking comes in. If it's a relatively common question on a slow weekday, the customer might get a callback within 2 hours. If the call comes in over the weekend or we want to respond with a care video, the response might be by email sometime the next business day. Asking good questions and looking up the issue in our knowledge base is crucial to setting realistic expectations.

[Tyler] It sounds like you're looking for a course on managing the call and setting expectations?

[Alex] It's a bit more than that. We really want to get them more invested in the call and own it.

[Tyler] We need to focus on improving communication skills and problem-solving techniques. There's also an opportunity for empathy. Some customers spend their entire lives creating a beautiful outdoor space. A nice yard is an opportunity to express a lifestyle. A lawn under siege by grubs or an orange tree with bitter oranges can cause a lot of distress.

[Alex] I never thought about it like that. How do you fix bitter oranges?

[Tyler] Soil remediation. Orange trees thrive in nutrient-rich soil with good drainage. We have to be prepared with answers like this. It's why customers buy from Full Sun Growers over the big box stores. They need to know we're here for them and that we care. If you'd told one of my team members that you were experiencing bitter citrus, I'd expect them to express some concern, ask questions about the issue, and offer a good solution. Maybe explain that a specialist would be in contact and offer to email an article on soil quality in the meantime. That's essentially the Garden of Excellence model.

[Alex] That actually sounds like a solid response. I'd be a happy caller.

[Tyler] You probably would! It's all covered in the 'Garden of Excellence' model. That's how we got that 88 NPS. There's a few things I'd like to improve. How we empathize, the time they spend digging into the customer's needs, the ownership we take over each call.

[Alex] Those are some great goals. How do you measure things like the time our agents take with the customer or the ownership?

[Tyler] That's a good question, Tyler. We really don't. Not anymore. We live and die by the NPS score.

[Alex] If we were able to give you the best training possible, where would you like to see that NPS score?

[Tyler] 88 seems to be the sweet spot. Leadership would love to see it at 90 but there's always going to be a handful of customers that turn out to be detractors.

[Alex] OK.

[Tyler] I think 88 is a solid number to shoot for.

[Alex] Do you have a timeframe to get there?

[Tyler] That's tough. We need to show a turnaround right away. Like I need us to be at an 83 ASAP to show we're turning it around. I know it'll take a bit of practice so if we could get to 85 within a month and back to 88 in 10 weeks, I'd be happy.

[Alex] Yep, we can definitely work with that.




Individual / Group Activity

Scenario 3: Expense Reports


Use the Do Sheet below to complete the activity when introduced by your Facilitator.

E-Learning Uncovered



The End Result

What business outcome should increase or decrease?




The DO List

What on-the-job actions will give you the end result?



The Vision

What's the dream state? What would it look like if everyone did what they need to do?



The Gap

What's the difference between the current state and the dream state? Why does that gap exist?

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Scenario 4: STEM, Roots, and Shoots

Marie is one of Full Sun Growers' most tenured employees and prolific talkers! In her current role, Marie conducts community outreach. She could use some help from Tyler to professionalize a STEM program aimed at getting kids excited about botany and agriculture.

[Tyler] Marie! It's been so long - how are you? I feel like I haven't seen you around the main office in ages! Where have you been hiding?

[Marie] Tyler, dear! So good to see your face. I'm still kicking around. You know, since my little Leo and Mia came along – my grandkids – well, priorities just do a little shift, don't they? Just last week, Leo lost his first tooth, and the Tooth Fairy, who bears a striking resemblance to me, apparently left glitter all over his pillow. The magic is real, Tyler!

[Tyler] That's so sweet, Marie. It sounds like a wonderful change of pace.

[Marie] It really is. Anyway, I decided the big District Manager chair wasn't quite where my heart was anymore. I needed more flexibility, more time for skinned knees and bedtime stories. So, I'm doing public outreach now. It's lovely, really. I get to lead demonstrations at the stores – things like how to properly prune roses, a lot of folks are scared of that one! Sometimes I chat with the students at the local colleges about careers in horticulture. But the best part: I pop by the elementary schools to try and inspire tomorrow's gardeners. It's a different pace, but a good one. How have you been keeping, Tyler? Still wrangling all those course designs?

[Tyler] I'm doing well, thanks, Marie! And yes, always a new design puzzle to solve. What you're doing now sounds absolutely wonderful. You're living the dream, it seems! And I heard through the grapevine that you might need my expertise for one of these fantastic programs for the kids?

[Marie] Oh, the grapevine is working overtime, isn't it? I'm genuinely thrilled to have your brain on this, Tyler. We've got this program, it's part of our push to connect with the community, especially around STEM – you know, Science, Technology, Engineering, and Mathematics.

[Tyler] STEM is awesome. I'd love to help.

[Marie] We call our little botany series 'STEM, Roots, and Shoots.'

[Tyler] That's brilliant! I love it. So, tell me more about what you're doing with it now.

[Marie] Well, it's a six-part series. Once a month, for six months, my assistant and I go into an Earth Science class. We do a demonstration, talk about plant biology, cell growth, photosynthesis – the whole shebang. The kids, bless their hearts, they get all wide-eyed and excited the first time or two we visit. New faces, something different from the usual routine, you know?

[Tyler] That's lovely to picture.

[Marie] It is. But Tyler, I've started to notice... after a while, some of them start to look a bit... well, like they're watching paint dry. Their eyes glaze over. And that's not what we want, is it? It's supposed to be exciting! I remember when my Leo first saw a Venus flytrap actually snap shut on a fly, his eyes nearly popped out of his head! We need more of that kind of wonder.

[Tyler] I can definitely see that.

[Marie] Kids want to be hands-on, get their fingers dirty, literally in this case!

[Tyler] It sounds like there's a lot of potential to make it more interactive.

[Marie] Exactly! And there's a bit more to the ask, here. This program sort of started as my baby, a passion project when I first transitioned into this role. It's grown wonderfully, like a well-tended perennial. But, as this outreach has gotten bigger, naturally, the folks upstairs – bless 'em, they have to watch the bottom line – they've started to look at it with an eye towards, shall we say, 'demonstrating value.' That's the polite way of saying, 'Marie, dear, how is this helping the company pay the bills?'

[Tyler] Ahh. So we're looking to monetize a bit on the goodwill.

[Marie] Precisely. It's not written down in any formal memo, but there's a certain... unspoken expectation. When we go into these schools, the hope is that they'll give us a little shout-out. You know, a mention in their PTA newsletters, or maybe a picture on their school's social media page – 'Look what Full Sun Growers is doing with our amazing students!' That sort of thing.

[Tyler] Right, getting that community visibility.

[Marie] Exactly. And those mentions, well, they tend to bring people into the stores. It's all connected, like the roots of a tree. Our leadership team is really looking at this as a way to build loyalty.

[Tyler] Got it. So, the ultimate goal here isn't just about amazing kid's programming. Are you looking primarily for a bump in that kind of publicity, or is the main driver to increase the actual engagement with the students?

[Marie] My heart is with the kids. Seeing their faces light up when they learn something new, that's my paycheck, emotionally speaking. But I've been with Full Sun long enough to know that my actual paycheck, the materials we use, and my fantastic assistant, Sarah – she's a gem, well it all has to come from somewhere. So yes, it's both about engagement and publicity. We need to show that the program is valuable, that it's doing good in a measurable way. And I truly believe that if we make these sessions more engaging, more hands-on for the children, the schools will naturally be more inclined to share what we're doing. Happy kids, happy teachers, happy principals... they talk! It's a win-win, I think.

[Tyler] There's absolutely nothing wrong with having multiple goals. In fact, it's pretty common. Knowing what we're aiming for, both in terms of student impact and business outcomes, helps me design something that truly meets your needs. So, I appreciate you sharing all that.

[Marie] Of course, dear. Transparency is key, isn't it? Just like with a good compost heap, you need to see all the layers! So, I suppose at some point I'll need to get you some concrete numbers to aim for, regarding those mentions and things.

[Tyler] For sure. Metrics will be important down the line.

[Marie] Exactly. But for now, let's just say the aim is a noticeable increase in our mentions on school social media and in their communications, and a significant boost in how involved the students are with the material itself. Does that sound like a starting point?

[Tyler] That's a perfect starting point. So let's dive into that student involvement piece. When you say 'engagement,' what does that look like ideally?

[Marie] Something tangible that shows the kids aren't just passively listening, but that they're processing it, connecting it to what they already know, and maybe even applying it.

[Tyler] Makes sense.

[Marie] I was thinking, you know, the scientific method is a big part of STEM. What if we had them doing more with that? My grandson, Leo, he's in third grade, and they're just starting on hypotheses. He came home the other day with a whole experiment planned for which of his toy cars goes fastest down the slide in their backyard. It was adorable, and he was so proud he'd figured out how to test it! Had a little notebook and everything.

[Tyler] That's a great idea! So, having them form a hypothesis about an experiment, for example? Something that shows them actively participating in the scientific process?

[Marie] Exactly! But then, Tyler, we hit one of our little snags. We're often on a tight schedule in the classrooms, you barely have time to say hello and goodbye sometimes. And, you know, liability.

[Tyler] It's always liability, isn't it?

[Marie] The paperwork alone! So, typically, my assistant or I end up doing the actual experiment, maybe with one or two students chosen to 'help' while the others just watch.

[Tyler] There's always a snag.

[Marie] Tell me about it! It's not ideal for widespread engagement. It's like inviting everyone to a birthday party but only letting one child take a whack at the pinata. So, yes, getting them all to write down or share a hypothesis about what they think will happen before we do the demo... that feels like a good step. Gets their brains whirring, at least.

[Tyler] Okay, so getting them to form and share hypotheses is one concrete idea. What else could we potentially shift from your demonstration to being more student-led or student-involved?

[Marie] Oh, I think there's quite a bit we could do there! For example, measurement! We're often tracking plant growth over a few weeks, or sometimes we do experiments around transpiration rates, or even looking at soil density and composition. It's fascinating stuff, really – did you know some plants actually prefer compacted soil?

[Tyler] Interesting! I didn't know that. So, how would they get involved in measurement?

[Marie] Well, instead of just us doing the measuring and telling them the results, we could involve them. Maybe in small groups, each with a little task? Or have them record the data in a shared document or a little science journal? We could even get creative with how they measure – non-standard units for the younger ones, perhaps like 'how many popsicle sticks tall is the sunflower today?' We just have to be mindful of the materials, some of our tools are a bit delicate, or, you know, pointy! Safety first, especially with the little ones. My Mia, the other day, tried to "help" me prune my prize-winning azaleas with her safety scissors... let's just say it was a learning experience for both of us, and the azaleas are looking a bit surprised.

[Tyler] That sounds promising, and very creative with the popsicle sticks! So, how many lessons are we talking about in total? You mentioned a 6-part series, but are there variations?

[Marie] Goodness, yes. The core is the 6-part 'Roots and Shoots' series, but over time, we've developed variations. So, it's probably closer to a dozen distinct lessons if you count the different iterations we have for the different grade levels.

[Tyler] A dozen lessons, okay.

[Marie] And we're currently reaching students from 4th grade all the way up to 9th. Each age group needs a slightly different approach, you know. You can't talk about mitochondrial respiration with a fourth grader the same way you do with a ninth grader, can you? And then there's the new challenge – one of the middle schools we partner with has gone fully online! So, we have to figure out how to make these hands-on concepts work through a computer screen. It's a bit like trying to teach someone to swim without letting them get in the water, or describe the scent of a rose to someone who's never smelled one, but we'll figure it out. We always do. Creative problem-solving, that's what gardeners are good at!

[Tyler] Wow, okay! So this is quite a comprehensive program you've built, covering a wide range of ages and now an online format too. It's a significant project to revamp all of that.

[Marie] Well, now, I don't want to scare you off, Tyler! It might sound like a mountain, but I'm hoping we can be clever about it, maybe find a nice path around the steepest parts. What I'm really envisioning is that we could develop a kind of... a framework? Or a template, maybe? You're so good with structure.

[Tyler] A framework or template could be very effective, yes.

[Marie] Something that establishes best practices for student involvement that we can then use as a guide to revise our existing lessons, and to build new ones. So, not necessarily redoing every single lesson from scratch with you, but creating a new way of doing things that my team and I can then apply. Does that make more sense?

[Tyler] Perfect sense. I think we have something special, Marie.




Activity

Scenario 4: STEM, Roots, & Shoots


Use the Do Sheet below to complete the activity when introduced by your Facilitator.

E-Learning Uncovered



The End Result

What business outcome should increase or decrease?




The DO List

What on-the-job actions will give you the end result?



The Vision

What's the dream state? What would it look like if everyone did what they need to do?



The Gap

What's the difference between the current state and the dream state? Why does that gap exist?

- ### Off-Limits
- Know
 - Understand
 - Be aware
 - Learn

- ### Caution
- List
 - Describe
 - Define
 - Explain



Scenario 5: Garden Guardians

In this scenario, Tyler meets with Erin, a manager at one of Full Sun Growers' distribution centers. Erin is ready to roll out a cost-control initiative to other distribution centers and needs Tyler's help with training.

[Tyler] Erin! It's great to see you. How have things been at the distribution center?

[Erin] Hi Tyler! Things have been busy but good. We've been working hard on our Six Sigma project to reduce costs from patio furniture damage.

[Tyler] Ohh! High stakes! Doesn't patio furniture deliver huge profits?

[Erin] Yes! It has the biggest margin of any category we sell. And it's going even better with the improvements we've made at my warehouse. We piloted a program to reduce costs associated with damage. We've seen significant improvements, so the program is being rolled out to our all 4 distribution centers. You know Full Sun loves to give everything a fun name so we're calling this program The Garden Guardians.

[Tyler] Hah! That's catchy. I'm already loving it. Tell me more.

[Erin] Sure. On average, 35% of the furniture we order has damage that makes it unsellable.

[Tyler] Whoa! Over a third. What do we do with it all?

[Erin] That depends. If it's received with damage, it never makes it off the dock. The vendor has to take care of it and usually that means it gets sent off to a liquidator.

[Tyler] Sounds good. So it becomes their problem.

[Erin] Yes, but it's our problem too. There's administrative costs associated with reporting the damage, labor costs to unload and temporarily store it, and an impact of insufficient inventory. This Spring we had a shipment of 8 teak Serenity Garden benches and all but 1 had splits in the wood. The distributor took them off our hands, but it was going to take 9 weeks to get replacements. It didn't make any sense keeping the samples in our stores, so we took a loss and sold off the samples.

[Tyler] I never thought about that ripple effect.

[Erin] Sometimes it's damaged upon receipt, so furniture was damaged either when it arrived or sometime between delivery to the warehouse and delivery at the customer's home. We've managed to reduce that significantly with our new guidelines.

[Tyler] Wow, that's a big improvement. What contributes to that high rate of damage?

[Erin] There were several factors. Poor handling practices, inadequate packaging, and lack of training were major contributors. We realized we needed a comprehensive approach to address these issues.

[Tyler] So, what changes did you implement?

[Erin] Our first big win was working with vendors on packaging materials. Adding about \$3 to \$5 in cardboard gave the boxes the added rigidity our boxes needed. We tagged in a packaging consultant, and it was pricey, but they helped our vendors ship in boxes that were reinforced in just the right spots. Three to five dollars in cardboard eliminated 60% of the damage sustained in shipping. Best of all, the vendors absorbed that cost!

[Tyler] Sweet! Do you think there's any training around that? It sounds like it's the responsibility of the vendor to package the product sufficiently.

[Erin] You're right, it is the vendor's responsibility. Typically, they do a good job but sometimes they miss the mark. The stakes are high on this merchandise, so The Garden Guardians program requires our inbound distribution center teams to do a spot check on packages over 30 kilograms. If there's an expectation, they report it to a supervisor.

[Tyler] Good call. What else are you doing to reduce damage?

[Erin] The next change we made was a simple designation that tells our distribution center staff who is authorized to move what merchandise. We have Lift Operators who have a designation of Lift 1, 2, or 3. After their initial training, new and seasonal Lift Operators start at a 1. After a certain number of accident-free hours behind the lift, they can certify for a promotion to Lift 2. And again, to Lift 3. Boxes with significant value carry a label with a 2 or a 3 to indicate who is authorized to move them.

[Tyler] Ahh. I'm guessing a Lift Operator 3 can move a box marked 2 or marked 3. But a Lift Operator 2 can only move a box marked 2?

[Erin] You got it. Right now, it's up to the Inbound supervisors to label the boxes when they come in. When we roll out the Guardians program to the other distribution centers, they need to recognize which products get which labels.

[Tyler] Who else needs to know the significance of the labels?

[Erin] This is tricky. There's a lot of work for our planners here. They use software to map out who picks what, but the software isn't set up yet to identify which products get a 2 or 3 designation. That upgrade is coming next year. So, for now, they need to manually check the assignment lists. For Phoenix and my center in Fontana, it's easy. Furniture is always stored in aisles 19 through 25. For Elk Grove and Aurora, they're not as organized and their planners really need to know their products.

[Tyler] That's a lot of responsibility. Do you have SOPs to help them?

[Erin] We do and it's working out well here in Fontana. The labels themselves act as a failsafe. The lift operators here know they are never to grab a package labeled with a number that exceeds their own designation. We made it easy, so no matter the language the lift operator is fluent in, the number on the package is a clear indicator of what they are allowed to pick. It's a bit of a culture shift, but we need to train our Lift Operators how to communicate with their supervisor if the label exceeds their designation and we need to train our supervisors to accept that pushback without exception.

[Tyler] That's a big shift. Do you have buy-in from everyone?

[Erin] We do. Damaged merchandise impacts the District Managers who oversee our distribution centers more than anyone. So they've been asking for this for a long time and are fully on board. The good news is we have some incentives coming. Each month, distribution centers who meet their damage goals get an incentive – anywhere from a party to a bonus depending where they land. So that's a great win for employees who get on board with the Guardians program.

[Tyler] Great! I feel like there's something to be said for employees who don't follow the program?

[Erin] This is pending HR review, so I'd ask you to keep it under wraps. But there's a disciplinary program for lift operators and supervisors who deviate from the program. Anywhere from exclusion from that month's bonus to termination. We can talk about the incentives in this training, but HR will cascade the other side.

[Tyler] OK. And you mentioned language considerations. Is that something we'll want to build into the training?

[Erin] Absolutely. After you put together a training package, my team is out to each center to train the supervisors and managers. That group has sufficient English language skills to attend that training so the scripting can be created in English. From there, we need to be creative. Our frontline staff speaks a combination of English, Spanish, Korean, and Vietnamese.

[Tyler] That's a good thing to know. Is there anything that we need to produce in another language?

[Erin] There is. We're going to want printed materials like posters in the work areas and a revised sticker on each of the forklifts. For those materials, we want to lean on graphics whenever possible to convey a meaningful message. When text is critical, it will need to be in all 4 languages.

[Tyler] Got it. Is there anything else we should consider with this audience?

[Erin] Well, yes. And I don't want to sound critical, but we'll really want to be mindful about delivery. L&D has provided us great eLearning courses before and that probably went over great in corporate and our retail centers. This is an energetic group. Our best employees are used to having their productivity tracked so they come in ready to stay in motion. They have a finite tolerance for classroom time, so we want to keep the training short, with one topic a day. We're talking 5-7 minute bursts during their daily safety meeting before we lose them.

[Tyler] Good point! And I appreciate the feedback. Other than keeping the lessons short, do you have any other tips on what works well for this group?

[Erin] Absolutely. We mentioned the perks of the Guardians program so that should be weaved into your lessons. We also want to make sure the group understands that what they do matters so that they come in with a sense of pride. We could do a better job of explaining why they're here and what their work does for the customer and the company.

[Tyler] That's a slam dunk. Helping them link the importance of cartons marked with a 2 or 3 with what's inside would be huge.

[Erin] Yeah! I love that. The third thing is that this group needs to experience a new task hands on. This is probably where classroom-based courses fail. I need them up on their feet, putting labels on merchandise and identifying boxes with a 2 or 3 label. That kind of activity gets the gears turning.





[Tyler] This is great insight Erin. I think I'll have fun with this course. I can't wait to see how the program unfolds.



Activity

Scenario 4: STEM, Roots, & Shoots

Use the Do Sheet below to complete the activity when introduced by your Facilitator. For this activity, you will complete both pages of the Do Sheet.

 <p>The End Result <i>What business outcome should increase or decrease?</i></p> <p>E-Learning Uncovered</p> <div style="border: 1px solid black; height: 80px; width: 100%;"></div>	 <p>The DO List <i>What on-the-job actions will give you the end result?</i></p> <div style="border: 1px solid black; height: 300px; width: 100%;"></div>		
 <p>The Vision <i>What's the dream state? What would it look like if everyone did what they need to do?</i></p> <div style="border: 1px solid black; height: 80px; width: 100%;"></div>	<table border="1"><tr><td data-bbox="998 1444 1263 1663"><p>Off-Limits</p><ul style="list-style-type: none">• Know• Understand• Be aware• Learn</td><td data-bbox="1263 1444 1531 1663"><p>Caution</p><ul style="list-style-type: none">• List• Describe• Define• Explain</td></tr></table>	<p>Off-Limits</p> <ul style="list-style-type: none">• Know• Understand• Be aware• Learn	<p>Caution</p> <ul style="list-style-type: none">• List• Describe• Define• Explain
<p>Off-Limits</p> <ul style="list-style-type: none">• Know• Understand• Be aware• Learn	<p>Caution</p> <ul style="list-style-type: none">• List• Describe• Define• Explain		
 <p>The Gap <i>What's the difference between the current state and the dream state? Why does that gap exist?</i></p> <div style="border: 1px solid black; height: 80px; width: 100%;"></div>			



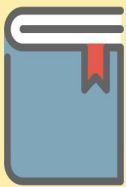
Activity

Scenario 5: Garden Guardians

Use the Do Sheet below to complete the activity when introduced by your Facilitator. For this activity, you will complete both pages of the Do Sheet.

The DO:

E-Learning Uncovered



Do they know what to do, how to do it, or when to do it? Do they have misconceptions? Is their knowledge incorrect?

What do they need to know?

What might be hard to learn?

What do they need to memorize vs. look up?

KNOWLEDGE



Are they aware of the problems and interested in solving them? Will they believe the solutions will work? Worth trying?

What are the issues?

What will help THIS audience care?

MOTIVATION



Will they be able to do it well without practice? If not, how close can you get to simulating the on-the-job behavior?

When and where can you practice?

To what degree of proficiency?

Give/show/tell them:

and they:

PRACTICE



Are there environmental factors that make it hard: it's challenging to perform; there are issues with equipment, people, communication; etc.

What are the obstacles?

How can you prepare them

OBSTACLES



Scenario 6: Facilities

In this scenario, Tyler meets with Greg, the Facilities manager at Full Sun Growers'. Greg's team could use a refresh on the process to keep their retail stores safe and clean.

[Tyler] Hey Greg, thanks for making time today. I know you've got a lot on your plate.

[Greg] Yeah, well, I figured if this helps get things running smoother, it's worth the time. I've got three stores calling me already this morning, so let's make it count.

[Tyler] Absolutely. So, I wanted to talk about the facilities team and some of the challenges you've been seeing. Can you walk me through what's been going on?

[Greg] Sure. Look, the basics are getting done—trash is out, aisles are clear, bathrooms are clean. But when something out of the ordinary pops up—like a busted light fixture or a leaky irrigation line—no one takes the initiative. They just wait around until someone tells them what to do.

[Tyler] Got it. So they're handling routine tasks, but not the unexpected ones?

[Greg] Exactly. And that's what's killing us. We had an audit last week—lighting out in two aisles, HVAC filters overdue, backup batteries disconnected. That's not just sloppy, it's dangerous. And it makes us look bad in front of customers.

[Tyler] That's definitely not ideal. Do you have a sense of why they're not stepping up?

[Greg] I've asked. Most of them say they're not sure if it's their job or the night crew's. Which is ridiculous—we've got a flipbook in every store that spells it out. And there's a whiteboard for notes between shifts. But no one's using it right.

[Tyler] So the tools are there, but they're not being used effectively?

[Greg] Bingo. I think part of it is they don't see the big picture. They think, "Well, I did my part," and that's it. No ownership. No pride in the whole store.

[Tyler] What do you think would change if they *did* take ownership?

[Greg] Honestly? The stores would run smoother, customers wouldn't see broken stuff, and I wouldn't be chasing down minor issues all day. If everyone just handled what they saw—or at least flagged it properly—we'd be in a much better spot.

[Tyler] How could we measure something like that?

[Greg] That's easy. I want to see the number of stores emailing me about maintenance issues to go down. Way down. A couple years ago, I got 1, maybe 2 messages a week. Now, it's 3 a day, minimum. I want it back down to 2 a week.

[Tyler] That sounds like a solid vision. Everyone taking ownership, communicating clearly, and stepping in when something's off.

[Greg] Exactly. I don't need heroes, just folks who come in and take pride in what they do.

[Tyler] What motivates this group, in your opinion?

[Greg] They're not lazy. Most of them like the work. They just don't want to step on toes or get blamed for doing something "wrong." There's a fear of overstepping, especially the night crew. Their work is solitary, and they don't really get how the store runs. They probably don't feel like their input matters.

[Tyler] It seems like things used to run smoother? What changed?

[Greg] Over time, they've stopped following protocol. Our flipbook for instance. It's a printed guide with 20 of the most common Facilities tasks. It's color-coded with 8 tasks on orange paper for my day shift and 12 tasks in blue for my night shift.

[Tyler] Can I get an example?

[Greg] Sure. Overhead irrigation. That's for the day shift. If it's dripping, they need to block the aisle so customers don't slip. They set up a 12' ladder – not a step stool – and fix the leak. Once they dry the ground and remove the ladder they can re-open the aisle.

[Tyler] Easy enough. So it sounds like we need to help them get re-acquainted with the flipbook.

[Greg] Yeah. I don't want to see it collecting dust. Same with the whiteboards. I want to see they're using it to communicate.

[Tyler] How do they use it?

[Greg] There's 3 rows. One for "Night", one for "Day" and one for "Support Team". When day shift notices something that the night shift should take care of, they write it on the board. And if they need the support team to help with a big item, like an HVAC failure, they file a ticket, write the issue with the ticket number.

[Tyler] What do they do if there's still confusion? Something that's not in the flipbook?

[Greg] It's pretty simple. I've always told them if you see a problem either fix it or flag it. So if it's not in the flipbook, and they know how to fix it, do it. They don't need me to hold their hand. If they don't know how, that's fine. File a ticket and we'll figure it out. But don't wait for me and don't wait for a manager.

[Tyler] Perfect. Last question— is there anything I should know about what might make it hard to learn?

[Greg] Yeah. Some of the older guys are set in their ways. They've been doing this for years and don't love change. And the newer folks? They're eager, but they don't always speak up. So we'll need to hit both groups differently—maybe pair them up or use examples that speak to both.

[Tyler] That's super helpful, Greg. Thanks for being so candid. I think we've got a solid foundation to build from.

[Greg] Just make it stick, Tyler. I don't want to be having this same conversation six months from now.




Activity

Scenario 6: Facilities


Use the Do Sheet below to complete the activity when introduced by your Facilitator. For this activity, you will complete both pages of the Do Sheet.

E-Learning Uncovered



The End Result

What business outcome should increase or decrease?




The DO List

What on-the-job actions will give you the end result?



The Vision

What's the dream state? What would it look like if everyone did what they need to do?



The Gap

What's the difference between the current state and the dream state? Why does that gap exist?

- Off-Limits**
- Know
 - Understand
 - Be aware
 - Learn

- Caution**
- List
 - Describe
 - Define
 - Explain



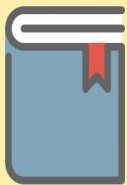
Activity

Scenario 6: Facilities

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E-Learning Uncovered



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KNOWLEDGE



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What are the issues?

What will help THIS audience care?

MOTIVATION



Will they be able to do it well without practice? If not, how close can you get to simulating the on-the-job behavior?

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