COMPANY X: PERFORMANCE ASSESSMENT

This performance assessment covers my analysis for Company X – an edtech scale-up company.

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## Describe the Performance System

**Overview of the organization**

A software as a service company, referred to as ‘Company X’ in this performance assessment, helps connect international students from all over the world to their dream colleges and universities in Canada, the United States of America, Australia, and the United Kingdom. Company X emerged from the experience of an international student from the Middle East who decided to pursue his further educational endeavors in the field of Engineering in Canada. During the application process he quickly realized the bottlenecks in the international student application process such as extenuating application processes and waiting times. In 2015 the founder set on a mission to make education accessible by students all over the world and founded a company that developed a SaaS based AI powered online platform where students could directly choose and apply to the educational institutions, they were most interested in while Company X acts as the middleman connecting the students and educational institutions. The platform provides students with necessary information on the program, grade/application requirements, language requirements, tuition cost estimates, and more. Company X started as a 10-person start-up and over the years quickly developed into a 1500+ scale-up company.

**Overview of Company X’s goals**

Company X led with Return on Expectation (ROE) to build trust and mission alignment. When the company was in its earlier stages, Return on Expectation was immensely critical as the company was still building its concept, focused on gaining traction from customers to use their services and for people to select it as a place to work, and continuously proving its value. However, now the company is starting to layer in Return on Investment (ROI) to scale and secure funding. This is essential as the business continues to mature and financial sustainability becomes critical. The business is heavily reliant on investor funding and support to continue growing.

**Organizational Goals**

In this performance assessment, I will focus on two goals that are critical to the success of Company X. The first goal is to increase employee training retention and results by 85%. As found in a recent customer feedback survey, a large majority of customers were unhappy with the level of errors and mistakes found in their applications. The goal is to increase the customer satisfaction score to 75% or more.

**The Human Performance System Diagram**

See below the human performance system diagram outlining additional details about Company X. It highlights the external environment, which are factors that are outside of the organization’s control but those that may impact decisions within the organization. The diagram also highlights the internal environment of the organization, which shows what is available to employees within the organization.



**Terminology Chart**

See the terminology chart below to learn more about the various abbreviations and terminology used in the diagram.

|  |  |
| --- | --- |
| Terminology/Abbreviation  | Definition  |
| AI (Artificial Intelligence) | Refers to the ability of computers and machines to perform the same tasks or roles that would otherwise require human intelligence.  |
| IELTS (International English Language Testing System) | Refers to an English language proficiency test that is required to be completed by international students studying abroad in the U.S or Canada. |
| TOEFL (Test of English as a Foreign Language) | Refers to an English language proficiency test that is required to be completed by international students studying abroad in the U.S or Canada. |
| LMS (Learning Management System) | Refers to a technology that hosts all eLearning courses and instructional materials for an organization. This includes course catalogs, learning paths and more. |
| Job Aid | A job aid is a step by step on the job resource designed to help employees complete their job.  |
| KPIs (Key Performance Indicators) | Refers to measurable values that show how well a person, team, or organization is achieving their key objectives. |
| ID (Instructional Design) | Referring to the role of an Instructional Designer who is responsible for designing and developing and implementing instructional materials.  |
| Camtasia | Refers to a video and audio editing tool used by Instructional Designers.  |
| Canva | Refers to a graphic editing tool used by Instructional Designers. |
| Articulate 360 | Refers to an eLearning content creation tool used by Instructional Designers. |

## Goals for the Initiative

**Overview of Goals for Company X**

In this performance assessment, I will focus on two goals that are critical to the success of Company X. The first goal is to increase employee training retention and results to 85% from 65%. As its currently standing, senior employees spend weeks delivering solely ILT-based training and then delivering retraining (if needed) but it appears to be ineffective as employees are making continuous repeated mistakes, which are found later through application audit checks. This is a concern for the company for several reasons such as:

* Increased number of applications with errors
* Creates backlog of applications
* Backlog of applications results in longer waiting times for customers
* Increase in application errors and longer waiting times results in overall poor customer satisfaction and experience

The second goal is to increase customer satisfaction scores as it currently sits at 65%. As found in a recent customer feedback survey, a large majority of customers were unhappy with the level of errors and mistakes found in their applications. The goal is to increase the customer satisfaction score to 75% or more.

**Measuring the Actual State and Desired or Future State**

I will measure the actual state by reviewing surveys and feedback available to me such as the customer feedback survey results, employee engagement survey results, and conduct employee focus groups to gather more information with regards to the training. In addition to this, I will conduct a formative evaluation on an ongoing basis with a small pilot group as I develop the training program. This will help me gather feedback as I develop a learning solution that is tailored to meet their learning needs (refer to sample questionnaire in table 1.1 in Appendix). Once the intervention has taken place and new training materials and instructional products are in place and being used by the employees, I will compare the results collected through similar means - surveys and focus groups to compare the new data to the original data to understand if any changes have occurred post intervention. It is essential to not regard each element piecemeal or in isolation as all parts need to be examined as they interrelate (Stolovitch, H., & Keeps, E., 2004).

**Description of Planned Interventions**

There are three key interventions I would like to perform to help achieve the goals described above.

1. **Conduct Root Cause Analysis and Streamline Content.** It is possible that training may be overloaded, outdated, or misaligned with what employees need to know to do the job. By facilitating HPT Intervention:
	1. I will utilize performance analysis to distinguish between skill gaps, process issues, and both external and internal environments.
	2. As part of the performance analysis, I will identify and prioritize training content that addresses the most frequent or impactful errors.
	3. I will eliminate "nice-to-know/have" content unless it directly connects to customer satisfaction or performance.
	4. I will place focus on targeting the real causes of errors instead of using retraining as a “blanket fix.” Training for the sake of training will not be an effective approach.
2. **Shift to a blended learning approach with scalable digital resources**. Relying solely on Instructor-Led Training (ILT) drains time between both the senior employees/trainers and the trainees as it’s not a scalable approach to support independent performance once the training meetings end. By facilitating HPT intervention:
	1. I will shift training delivery to developing modular eLearning or microlearning resources aligned to key performance tasks. This does not mean I suggest eliminating ILT, however there needs to be a balance.
	2. Create searchable job aids and SOPs so employees can refer as needed.
	3. Leverage the Learning Management Systems (LMS) to develop a streamlined learning path for learners with all their training resources by role. This becomes the one stop shop resource for trainees to reference on-the-job. Additionally, to use the LMS to track learner progress, training usage percentages, and training completion rates.

As a result, this reduces dependency on senior employees/trainers and improves knowledge retention with on-demand reinforcement.

1. **Integrate Post-Training Performance Support & Feedback Loops.** Without feedback or coaching, learners can’t calibrate their performance, and mistakes will continue to persist. By facilitating HPT intervention:
	1. I will implement peer mentoring or short post-training coaching sessions. This again takes time off the senior employees/trainers and allows trainees to take accountability, teach as well as learn from each other.
	2. Establish performance dashboards or regular quality checks tied to customer satisfaction metrics.
	3. Let trainees see how their actions affect outcomes by building transparency and showcasing customer feedback results. This boosts accountability and engagement.

Feedback channels convert training into continuous learning opportunities rather than one-off events.

**Kirkpatrick Model – Overview of Levels 3 and 4**

The Kirkpatrick Model is a process used for evaluation of training to determine its effectiveness (Fortress Learning, n.d.). The model has four distinct levels – level 1: reaction, level 2: learning, level 3: behavior, and level 4: results (Fortress Learning, n.d.).

**Level 3: Behavior – Are Employees Applying What They Learned?**

This stage evaluates whether employees are using the skills and knowledge from training on the job. The current ILT setup lacks post-training reinforcement, making it hard to ensure knowledge transfer. Without behavioral measurement, mistakes will continue to persist, and retraining seems necessary even if the original learning was sound. To ensure trainees are applying what they learned from the training to their job I will implement coaching and peer mentoring. I will develop instructional checklists or observational rubrics for supervisors and senior experts to assess application of skills during real tasks. Additionally, I will leverage pulse surveys or self-assessments to gauge employee confidence and behavioral change post-training. This will validate that training addresses performance gaps not theoretical knowledge.

**Level 4: Results – Are Business Outcomes Improving?**

Since I will be measuring whether training leads to tangible improvements, such as increased customer satisfaction, increased knowledge retention and, and reduced error rates. Company X is undergoing massive restructuring due to which many roles have been eliminated. I would need training that delivers ROI fast. I will track metrics tied directly to performance (e.g., email/chat quality, resolution time, customer complaints). Then, compare teams or cohorts with revised training vs. ILT-heavy groups. Finally, I will layer performance dashboards over operational KPIs to pinpoint training effectiveness. It closes the loop between performance gaps and business impact ensuring that training isn’t just educational, but transformational with real results.

## Identification of drivers of performance gaps

The overall issue I would like to tackle for Company X is to improve their training processes and develop instructional products that are clear and tailored to the job so that employees can do their job effectively and with reduced errors. The effectiveness of the training and employee performance is necessary because it is tied to customer satisfaction. Hence, it is essential to prioritize the training gaps and ensure it is intentional and curated systematically.

Thomas F. Gilbert is considered the father of human performance technology and in his studies of workplace performance, he identified six major sets of factors that affect workplace performance and built them into a model (Stolovitch, H., & Keeps, E., 2004).

See below my use Gilbert’s Behavior Engineering Model (Chapter 4 in the Stolovitch & Keeps (2004) to identify the type of factors involved.

Table 1.1

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Actual State | Desired State | Performance Gap: Description | How to measure:*What data might you collect to measure the actual state before and after your intervention?* | Type (Gilbert’s Behavioral Engineering Model) |
| Increase in repeated errors and mistakes in application processes. Trainees complete 65% of the student applications accurately and independently post ILT.  | Develop instructionally sound training program to reduce errors in application processes. Trainees should complete 90% of the student applications accurately and independently using training job aids and microlearning courses. | A 25% deficit in application completion comes from poorly designed and ineffective ILT training and lack of resources.The performance gap could be tied to lack of knowledge and/or skills but also possibility of low capacity (high volume of work/backlog) and lack of motivation due to work environment. | Measuring the actual state by: * Reviewing customer feedback survey data
* Reviewing employee engagement survey data
* Conducting focus groups with senior employees/trainers to understand gaps further
 | Environment – Information and resources. Individual – knowledge, skills, capacity, motivation. |
| Trainees receiving training and retraining – ILT as a blanket solution but it is ineffective. 15-20 hours a week at a time, a Senior employee/trainer is pulled away from completing their job to support ILT initiatives.  | Develop blended training and learning materials to reduce the amount of ILT training required. Eliminate the number of senior employees/trainers spending time on retraining and allow trainees to learn from each other through coaching and other means.  | Up to 20 hours of productivity is lost due to efforts in training that are not necessarily proving to be effective.  | Measuring the actual state by: * Reviewing customer feedback survey data
* Reviewing employee engagement survey data
* Conducting focus groups with senior employees/trainers to understand gaps further
 | Environment – Information and resources. Individual – capacity and motivation.  |
| As a result of the increase in application errors, the customer satisfaction scores have reduced to 65%. The goal is to get these scores to 75% if not higher. | Increase the overall customer satisfaction scores. | A 10% deficit in customer satisfaction scores due to poor output by employees.  | Measuring the actual state by: Reviewing customer feedback survey data Reviewing employee engagement survey dataConducting focus groups with senior employees/trainers to understand gaps further | Individual – Knowledge and skills, capacity, motivation.  |

## Continuing the Investigation

See chart below to learn more about the identified performance gaps, type of information I believe I will receive from using a combination of existing data analysis and documentation analysis techniques, and how I would go about learning more about the performance gap and what tools and techniques I would leverage.

Table 1.2

| Performance gap: *Description (each performance gap identified in step 2 on its own line)* | What you hope to learn: *What type of information do you believe you will receive from using this technique/tool.* | Technique/tool for further investigation: *How would you go about learning more about this gap?* |
| --- | --- | --- |
| A 25% deficit in application completion comes from poorly designed and ineffective ILT training and lack of resources. | By applying a combination of existing data analysis and documentation analysis technique, I hope to learn more about the following: * Specific performance deficiencies in application tasks that pinpoint where and why errors are occurring.
* Root causes behind the 25% deficit, such as unclear instructions, lack of post-training materials/resources, or procedural complexity.
* Gaps in training design, especially around content relevance, instructional methods, and accessibility of learning aids.
 | By applying a focus group and surveys/questionnaires techniques and tools, I hope to learn more about the gap:* Gather feedback from trainees highlighting training usability issues, confidence levels, or missing resources that hinder task performance.
* Gather feedback from senior employees/trainers and even supervisors identifying key concerns that hinder task performance.
* Identify patterns in job performance across different teams or training cohorts, enabling targeted improvements.
 |
| Up to 20 hours of productivity is lost due to efforts in training that are not necessarily proving to be effective.  | By applying a combination of existing data analysis and documentation analysis technique, I hope to learn more about the following: * Time allocation breakdown to distinguish between necessary versus redundant training activities.
* Effectiveness of current training methods (e.g., ILT vs. eLearning), identifying which formats lead to successful job application and which do not.
* Task-specific performance data to validate whether training outcomes align with performance expectations.
* Resource utilization insights showing how much time and effort are spent delivering content that could be streamlined or automated.
 | By applying a focus group and surveys/questionnaires techniques and tools, I hope to learn more about the gap:* Collect trainee and trainer feedback on clarity, relevance, and usability of training content especially as it relates to on-the-job tasks.
 |
| A 10% deficit in customer satisfaction scores due to poor output by employees.  | By applying a combination of existing data analysis and documentation analysis technique, I hope to learn more about the following: * Detailed performance data pinpointing which tasks or behaviors are contributing to poor customer outcomes.
* Error types and frequency tied to customer dissatisfaction (e.g., incorrect info, missed deadlines, lack of empathy).
* Environmental factors such as outdated tools, unclear procedures, or lack of support that hinder consistent performance.
 | By applying a structured interview and surveys/questionnaires techniques and tools, I hope to learn more about the gap:* Review customer experience insights, identifying what aspects of service are most impactful to satisfaction and loyalty.
* Review cross-team comparisons to detect whether certain groups or training methods outperform others. Customer Experience is one of the largest departments within Company X and has over five different teams – it’s fair to do a cross-team comparison to understand if the performance gap affects across the department or select teams.
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## Planning for Change: Potential Supporters and Barriers

See below charts to gain an understanding of potential supporters and barriers to implementing the suggested interventions, which stakeholders or resources would be involved and the potential positive or negative impact on the situation.

Table 1.3

| Support *(e.g., a sponsor, funding, other departments who can assist)* | Stakeholders or resources that might be involved *(internal or external)* | Impact on situation |
| --- | --- | --- |
| HR Team/Learning and Development/OE Team | Internal: * Operations Managers
* Team Leads/Supervisors
 | Rationale: Access to historical performance data and training feedback is essential. Lack of access to historical performance data results in a lack of benchmark data. This would make it difficult to collect data. |
| Sales Department  | Internal: * Team Leads/Supervisors
* Senior employees/trainers
* Instructional Designer
* Sales team
 | Rationale: Lack of collaboration with the sales department who understand the task demands and work closely with the customers will result in a lack of clarity and broken processes. Collaboration is essential to build a better and stronger blended learning program.  |
| Instructional Designer  | Internal/external: * Team Leads/Supervisors
* Senior employees/trainers
* Instructional Designer (or hire a freelance worker/consultant)
 | Rationale: Collaborating with existing Instructional Designer(s) or hiring one to repurpose ILT content into microlearning modules and developing a blended learning solution. Developing a new instructionally sound blended learning program requires expertise and support of an Instructional Designer. Lack of collaboration could result in repeating the same issues. This would make it difficult to complete the project altogether.  |
| SMEs/Customer Experience Trainers/Team Leads | * Team Leads/Supervisors
* Senior employees/trainers
* Instructional Designer (or hire a freelance worker/consultant)
 | Rationale: Existing documentation of SOPs or training materials that can be analyzed and will be used as a starting point to develop more instructional products that make sense/shorten as needed. It is important to identify what is “nice to know” or “nice to have” vs what is essential for completing tasks on the job and only existing SMEs or trainers can share this information.  |
| QA/Customer Success Team | * Operations Managers
* Team Leads/Supervisors
* QA team
* Customer Success team
 | Rationale: Historical performance and quality metrics tied to customer satisfaction/access to historical customer feedback are required. Lack of access to historical performance and quality data results in a lack of benchmark data.  |
| Data Science/Analytics/Customer Success Teams | * Operations Managers
* Team Leads/Supervisors
* Data Science/analytics team
* Customer Success team
 | Rationale: Develop a performance dashboard that ties to customer satisfaction. Access to performance dashboards will help mitigate and reduce errors which impact customer satisfaction.  |

| Barrier*(e.g., competition for limited resources, physical barriers, lack of training, mismatched expectations with administration)*  | Stakeholders or resources that might be involved *(internal or external)* | Impact on situation |
| --- | --- | --- |
| Organizational Resistance to Change | * Team Leads/Supervisors
* Senior employees/Trainers
 | Rationale: Team may feel protective over existing training content, especially if it's been used for years. This would make it difficult to complete the project altogether.  |
| Limited Data or Incomplete Documentation | * Operations Managers
* Team Leads/Supervisors
* Instructional Designer
 | Rationale: Lack of performance metrics or accurate task analysis could impact root causes. This would make it difficult to collect data.  |
| Conflicting Priorities | * Department SLT
* Operations Managers
* Team Leads/Supervisors
 | Rationale: Department or SLT may push back if streamlining training conflicts with business direction, budget or resources. This would make it difficult to complete the project altogether. |
| Tech Limitations or Integration Challenges | * Team Leads/Supervisors
* Senior employees/trainers
* IT
* Instructional Designer
 | Rationale: Though this is not likely, it could be possible that LMS might not support the ideal structure. This would make it difficult to complete the project altogether. |
| Employee Buy-In | * Department SLT
* Operations Managers
* Team Leads/Supervisors
* Trainees
 | Rationale: Learners and leaders may view digital formats as less “serious” than traditional ILT and resist the shift. This would make it difficult to complete the project altogether. |
| Data Silos or Misaligned Metrics | * Operations Managers
* Team Leads/Supervisors
* IT
* Data Science/Analytics team
* Process Improvement team
 | Rationale: Performance dashboards could be hard to build if data isn't centralized or consistently tracked. This would make it difficult to collect any future data which would show how well the interventions are performing.  |

**Appendix**

Table 1.1

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| --- |
| **Formative Evaluation – Focus Group Questionnaire (Trainees and Trainers)** |
| **Stage** | **Question** |
| **Needs Assessment Phase** | Walk me through the current state – what are current tasks or responsibilities, and how do you see this training supporting your job tasks? |
| What challenges do you currently face that this training should address? |
| What skills or knowledge are the most important to include in this training? Can you rank the importance of these items from 1 – least important to 10 – very important.  |
| **Design & Development Phase** | Are there any topics that seem confusing or unnecessary? |
| Are the learning objectives clear?  |
| Is the content is too basic or too advanced? |
| Are there any critical tasks, topics or scenarios that are missing? |
| How engaged were you during the training? And how motivated are you to use this training to help you complete your on-the-job tasks? |
| How would you rate the length and pacing of the modules? 1 being poor and 5 being excellent.  |
| **Testing Phase** | Was the module(s) easy to navigate and understand? |
| What parts were the most engaging or helpful? What parts weren’t engaging or helpful? |
| Were the visuals, exercises and knowledge checks effective? Should anything be added or removed? |
| Were there any technical difficulties during the navigation or at any point in the module(s)? |
| How confident do you feel about the application and understanding of this content to support your on-the-job tasks? |
| **Post-launch/Ongoing Feedback Loop** | Have you noticed improvements after the last changes were implemented? |
| Are there still areas we could improve? |
| Are you applying what you’re learning?  |

**References**

*Fortress Learning. (n.d.). What is the Kirkpatrick Model of Training Evaluation? . YouTube. https://www.youtube.com/watch?v=PSqDzpciKWw&t=25s&ab\_channel=FortressLearning*

*Stolovitch, H., & Keeps, E. (2004). Training Ain’t Performance. American Society for Training and Development.*