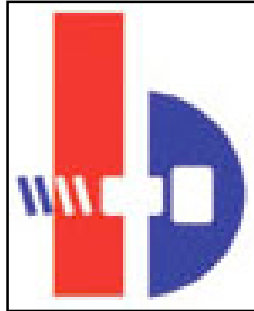


Analysis Materials For



Boulders Climbing Gym
Change Management Project

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Introduction

This document contains analysis materials that will be needed to identify the need for instruction on booking events at Boulders Climbing Gym. The staff of BCG and I examined characteristics of the performers, tasks, and performance context relevant to the topic and the learner group.

This document will cover the following key data analyses:

- Performer Analysis
- Context Analysis
- Task Analysis

This document also includes draft materials for:

- Instructional test materials
- Post-instruction reactionnaire
- Patron questionnaire
- Staff questionnaire

Creating several sources of data will allow the training program to be more effective, since it will include data from the staff and trainees, but also from the patrons, from whom BCG looks to earn repeat business.

Performer Analysis

The purpose for conducting a performer analysis is to have a better understanding of who will be involved in the training. Performer analysis will cover the general characteristics of the learners and patrons, and the learners' entry competencies. Hopefully, the data collection process (interviews and questionnaires) will reveal the learners' attitudes toward the instruction in general.

General Characteristics

The general characteristics are broken down into 2 categories: Performers and Patrons. This document will only focus on a basic demographic sample from both categories.

Performers – Most of the performers are between the ages of 18 and 25. Many of the performers are either current college students or recent college graduates, indicating that they have a better-than-average education. **For this project, the sample size will be 4 managers to ensure 95% predictability.**

Patrons – Most of the patrons interested in booking events are older than 30, because most of the events that are booked are either birthday parties for their children or school outings. **The focus of this project will be on the customer service and not marketing, so the patrons will be asked more about their perceived level of service than about their demographics or psychographics.**

Entry Competencies

One of the most important entry competencies is that the performers know the skills needs for climbing safely. This skill is essential for teaching gym customers how to climb safely. Combined with the skill to climb safely, most performers take an active interest in communicating with other climbers, which is beneficial for facilitating appropriate customer service. Several other staff members have worked with children or have teaching experience; both traits are valuable when providing services for birthday parties or other groups that require instruction.

Many of the performers are new to employment in the type of professional environment the Boulders Climbing Gym personifies. The employees are personable, but few employees have any customer service or supervisory experience.

Analysis Completion Process

Sean Geib and Nick Rhoads from BCG provided the information in this basic performer analysis. They were selected because they:

1. Had at one time in the past worked as a supervisor and/or desk staff member
2. Were willing and able to retroactively articulate their experiences of working at Boulders Climbing Gym throughout the past couple of years
3. Experienced and knowledgeable of booking event reservations

Sean and Nick volunteered information pertaining to the normal skills of people they currently work with or have worked with at Boulders Climbing Gym. Current staff members will be interviewed more during the data collection process.

Context Analysis

I analyzed the following types of context for this change management project: Instructional and Transfer. Identifying the change management context will make the data collection materials more effective.

Instructional Context

The instructional context provides information about the physical environment and scheduling of training. The General Manager of Boulders Climbing Gym will provide the instruction via a live demonstration conducted in the gym facility. The live demonstration will cover everything discussed in this paper's Task Analysis section.

Boulders Climbing Gym management will conduct the training during slow periods of the fall, winter and summer semesters. BCG believes that before the beginning of the semesters would be ideal for training, but many new employees do not report to work until the first week of the semester. Conducting the training during the slow periods will allow for more questions, demonstrations, and hands-on activities to promote transfer of information.

Transfer Context

The transfer context considers the opportunities for transferring the knowledge and skills from the training to the actual environment. Boulders Climbing Gym believes the knowledge and experience gained from conducting the training at BCG will transfer to the same environment easily since the users will not be removed from the transfer location.

Process Used to Complete Context Analysis

I interviewed Sean Geib, General Manager of Boulders Climbing Gym, for the context analysis data. He provided information about where and with whom the change management project would be implemented.

Nick Rhoads of BCG also provided needs analysis data through observing other staff members. He was instructed to look for certain behavior that indicated that performance improvement was needed or desired. Sean and Nick then communicated that data to me.

Task Analysis

I analyzed the topics and procedures that the shift managers need to understand in order for Boulders Climbing Gym to be booked successfully. The topics are what the managers need to *know*, and the procedures are what the managers need to *do*. Finally, this section contains the overall instructional objectives that the training session hopes to cover.

Topic Analysis

- Birthday Parties
 - Important information needed
 - Name
 - Phone number
 - Party date
 - Party time
 - Number of climbers
 - Must be a 3:1 climber:belayer ratio if climbers are under 12 years
 - Average age of climbers
 - 2 Birthday party packages
 - Package A
 - 6 climbers max
 - \$60
 - 1 hour gym use
 - Party room rentable for \$15/half hour
 - Traditionally reserved by climbers under age 7
 - Package B
 - 5 to 15 climbers
 - \$15/climber
 - 1.5 hours of gym use
 - Half hour of party room included

- Older kids appreciate more climbing time
 - Both packages include harness rental and an instructor
 - 4 optimal times for parties
 - Fridays – 4-6pm
 - Saturday – all day
 - Sunday – noon-6pm
 - During the summer – during normal operating hours
 - Climbers need waivers
 - Must use *Group* waivers
 - *Group* waivers do not get entered into ACT
 - *Group* waivers get entered in Excel – Birthday Party database
 - Different waiver delivery methods
 - Website preferred – www.bouldersgym.com
 - Download and print out waiver
 - In-gym pick-up
 - Waivers must be signed by parents
 - Adults other than child’s parent may sign *Group* waivers
 - Waivers only good for the day they come in
 - Payment options
 - 50% deposit required
 - Deposit is transferable
 - Deposit is *not* refundable
 - Contact **must** know deposit is required
 - Credit card
 - Over the phone
 - Drop off payment at the gym
 - Check/cash
 - Mail in deposit
 - Drop off deposit
- Groups
 - Similar to birthday parties
 - Contact information required
 - 3:1 climber:belayer ratio if climbers are under 12 years
 - Waivers required
 - Training the same
 - Deposit required
 - Costs
 - Costs depend on group sizes
 - Groups under 10
 - \$16/climber
 - \$150 minimum if group comes in beyond business hours
 - Groups 10-19
 - Can come in during business hours or outside business hours

3. Write down total time of party, including time in party room – Example: 4-6pm for party time and 5:30-6pm for the Party Room
4. Write down customer's name and phone number
5. Write down how many climbers will be attending
 - Boulders DOES NOT allow more than 6 climbers for Package A
6. Write down average age of climbers
 - a. Inform customer that climbers over 12 years can belay other climbers
 - b. Recommend one adult or teen for every 3 climbers
- E. Inform customer that every climber MUST have a waiver signed by his/her parent/guardian before they arrive for the party
 1. Direct customer again to website for waivers
 - Customer can include waivers in birthday party invitations – pre-signed waivers speeds up party
 2. Give directions to Boulders Gym if client will pick up waivers
 3. Check appropriate box on sheet regarding method for obtaining waivers
 4. Inform customer that party waivers are only good for the day of the party
- F. Inform customer that 50% deposit is required to hold party spot
 1. Inform customer that deposit is transferable but not refundable
 2. Inform customer of convenient payment options
 - Credit card over the phone
 - Drop off check or cash
 - Mail in check or cash
 3. Indicate on booking sheet the payment method
 - a. Write down date, amount and type of payment
 - b. Write down the invoice number from AAC
 - c. Write down “en route” or “will call back” if payment unconfirmed
 4. Restate deposit information to customer
 - a. Indicate number of kids
 - b. Indicate total reservation amount
 - c. Indicate deposit amount
- G. Reconfirm entire reservation with customer
 1. Indicate date of reservation
 2. Indicate time of reservation
- H. Write down your name and booking date at bottom of booking sheet
- I. Write down any additional information or requests
 1. Forward questions or concerns to General Manager
 2. Write down any changes on booking sheet
 3. Initial changes with date

- II. Booking Groups
- A. Inform customer about information on website – www.bouldersgym.com
 - B. Ask customer about group size
 1. Under 10 climbers - \$150 minimum
 2. 10-19 climbers - \$15/climber
 3. 20-29 climbers - \$12.50/climber
 4. 30-39 climbers - \$10/climber
 5. 40+ climbers - \$7.50/climber
 - C. Inform customer about 3:1 climber to belayer ratio
 - One adult or teen belayer needed for every 3 children under 12 years
 - Boulders provides one staff member for every 10 kids
 - D. Ask customer which day/time they are interested
 1. Groups under 10 – Schedule during normal business hours
 2. Groups 10-19 – Schedule whenever client would like to arrive
 3. Group 20 or more – Schedule outside business hours
 - E. Inform customer that all groups are scheduled for the maximum of 2 hours
 - There is no discount for less than 2 hours
 - F. Inform customer that there is no charge for use of the Party Room if reservation is outside regular business hours
 - Party Room is extra \$15/half hour if scheduled during normal business hours
 - G. Fill out Booking Sheet for “Group” found in the back of the GROUPS binder
 1. Circle “Group” at top of sheet
 2. Write down date of group
 3. Write down total time of group, including time in party room (if applicable) – Example: 1-3 pm for group and 2:30-3pm for the Party Room
 4. Write down customer’s name and phone number
 5. Write down how many climbers will be attending
 6. Write down average age of climbers
 - a. Inform customer that climbers over 12 years can belay other climbers
 - b. Recommend one adult or teen for every 3 climbers
 - H. Inform customer that every climber MUST have a waiver signed by his/her parent/guardian before they arrive for the group event
 1. Direct customer again to website for waivers
 - Customer can include waivers in permission slips – pre-signed waivers speeds up group
 2. Give directions to Boulders Gym if client will pick up waivers
 3. Check appropriate box on sheet regarding method for obtaining waivers

4. Inform customer that group waivers are only good for the day of the group
- I. Inform customer that 50% deposit is required to hold group spot
 1. Inform customer that deposit is transferable but not refundable
 2. Inform customer of convenient payment options
 - Credit card over the phone
 - Drop off check or cash
 - Mail in check or cash
 3. Indicate on booking sheet the payment method
 - a. Write down date, amount and type of payment
 - b. Write down the invoice number from AAC
 - c. Write down “en route” or “will call back” if payment unconfirmed
 4. Restate deposit information to customer
 - a. Indicate number of climbers
 - b. Indicate total reservation amount
 - c. Indicate deposit amount
 5. MAKE SURE CUSTOMER UNDERSTANDS RULES OF DEPOSITS
- J. Reconfirm entire reservation with customer
 1. Indicate date of reservation
 2. Indicate time of reservation
- K. Write down your name and booking date at bottom of booking sheet
- L. Write down any additional information or requests
 1. Forward questions or concerns to General Manager
 2. Write down any changes on booking sheet
 3. Initial changes with date

Process Used to Complete Task Analysis

After gathering basic learner analysis information, I contacted Subject Matter Experts (SMEs) as a means of providing accurate and effective topic and procedure analysis content. I chose SMEs that Sean identified as exceptional managers, because they exemplified behaviors that led to outstanding customer service and increased revenue.

The SMEs provided information via interviews, which was broken down into a topic and procedure analysis. I reviewed the analyses for content structure, and common attributes were grouped together. Finally, the SMEs provided additional feedback regarding accuracy of information and content structure.

Instructional Objectives

- ❑ Describe the elements of booking events (birthday parties and groups)
- ❑ Describe the 3:1 belayer ratio
- ❑ Describe event pricing
- ❑ Inform a customer of optimal event times
- ❑ Use Booking Sheets as tools for booking events by filling out sheets correctly
- ❑ Conduct deposit transactions
- ❑ Inform a customer about waivers
- ❑ Make changes to reservations and special requests
- ❑ Communicate with clients about the necessary event information
- ❑ Obtain client's reservation information
- ❑ Confirm reservations