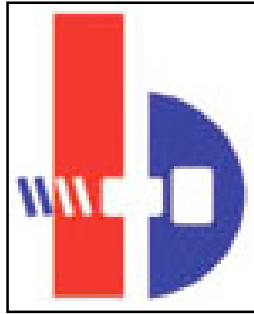


Performance Improvement Design Document For



Boulders Climbing Gym
Performance Improvement Project

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Introduction

The purpose of this design document is to provide a clear solution for improving performance at Boulders Climbing Gym. The Performance Analysis Document identified the target audience for performance improvement, and desired performer actions. This document details the collaborative efforts of Jorgensen Consulting (JC) and Boulders Climbing Gym (BCG) in designing solutions for performance improvement.

The Performance Analysis identified an instructional need for two procedures that the managers at BCG need to know in order for BCG to increase revenue while upholding safety standards: Booking Groups and Conducting Certification Tests.

The design document will describe:

- The Presentation of Instruction
- Course Content
- Testing and Evaluation Methods
- Motivational Strategies
- An overview of the Instructional Materials

The audience will be the same for both procedures, and the motivational strategies will be applicable for both procedures. However, the content and evaluation methods will be different.

Presentation of Instruction

Before presenting any instruction, the design team identified the instructional context and described the typical performers.

Context for Instruction

The instruction for Booking Groups and Certification Testing will take place in the Boulders Climbing Gym facility, and will involve common workplace items (phones, ropes, climbing systems, etc.).

BCG's general manager will instruct the courses, but a well-qualified performer may substitute at the GM's discretion. JC will design the instructional materials to be used by all instructors, not any specific instructor. BCG will conduct the courses

Each course will require at least three learners, and a maximum of ten. The activities will be collaborative so the performers can learn from and assist each other, which upholds the friendly, communal atmosphere of BCG. Using a collaborative approach in the instruction will also develop better, responsible communication between the managers. Therefore, it is necessary to have more than two learners, to allow for more collaboration. The limit of ten is due to time constraints; the course will take more time to complete based on the number of learners, and the instructional time will need to be less than 1.5 hours.

Performer Description

The audience for the instruction is comprised of BCG managers, who generally have some college education and Boulders employment experience. All managers have climbing experience, but their technique and safety standards may vary. Typically, managers of BCG have never managed employees elsewhere, and few have additional customer service experience.

As stated in the analysis, performers will have some knowledge common with that of booking groups. The employees' prior knowledge is based on completing tasks normally designated to desk staff employees. This knowledge includes:

- Communicating with customers over the phone
- Completing transactions in AAC with credit cards, cash, and checks
- Birthday parties and groups require at least one dedicated staff member
- Birthday parties are different than groups, but receive similar instruction

- Both birthday parties and groups require *GROUP* waivers
- Birthday parties and groups are both scheduled

For Certification Tests, the performers have the basic knowledge of the following:

- Boulders Climbing Gym belay and/or lead certified climbers
- Boulders Climbing Gym safety guidelines
- Climbing and belaying techniques
- Different types of climbing knots

In addition to these fundamentals about booking groups or conducting certification tests, the learners also have the desire to learn how to do the tasks according to BCG guidelines.

Course Content

The content for this instruction is based on objectives identified during the performance analysis. A performance map identified booking groups and conducting certification tests as instructional needs in order for BCG to meet the organizational goal of increasing revenue.

The instructor will present both procedures in the following manner:

1. Presentation of Instruction
2. Practice Activities

The instructor will use a direct instruction method for the main content, followed by a demonstration of the procedures. The practice activities, however, will be hands-on and collaborative through a variety of simulations and scenarios. The hands-on activities will improve the performers' retention of the information. The activities will vary for each performer, so everyone has a different learning experience.

The maximum instructional time for each course (booking groups or conducting certification tests) must be 2 hours. Most of the instructional time will be allotted to simulations and other practice activities. Therefore, the direct instruction time will be limited to 30 minutes, including demonstrations.

Instructional Objectives

The instructional objectives identify the observable behavior that the performers will demonstrate after completing the two courses. The following outlines for each course list the Terminal and Enabling objectives, plus the relevant content.

Booking Groups

Terminal Objective: The performer will be able provide inquiring customers with enough information about birthday parties and groups in order to increase the number of events they close, increasing BCG's event revenue.

Enabling Objectives:

1. Given a simulated customer call or visit regarding having a party or group at BCG, the performer will be able to recommend the best possible package for the customer. The recommendation must match that of the SME.
 - a. Determine the customer's needs
 - b. Match customer needs to a specific party or group package
 - c. Explain why the recommendation meets the customer's needs
 - i. Explain the features of the matching package to the customer
 1. Describe Package A
 - a. 6 climbers max
 - b. \$60
 - c. 1 hour gym use
 - d. Traditionally reserved by climbers under age 7
 2. Describe Package B
 - a. 5 to 15 climbers
 - b. \$15/climber
 - c. 2 total hours of gym use
 - d. Half hour of party room included
 - e. Older kids appreciate more climbing time
 3. Group sizes
 - a. Under 10 climbers - \$150 minimum
 - b. 10-19 climbers - \$15/climber
 - c. 20-29 climbers - \$12.50/climber
 - d. 30-39 climbers - \$10/climber
 - e. 40+ climbers - \$7.50/climber
 4. Inform customer that scheduling the Party Room as an add-on is an additional \$15/half hour
 - ii. Inform customer that all event packages include harness rental and an instructor to get the group started
 - d. Communicate the cost of the package
 - i. Calculate the recommended package cost given the customer's specifications
2. Given a simulated customer call or visit regarding having a party or group at BCG, the performer will be able to recommend the best possible date and time for the customer. The recommendation must match that of the SME.

- a. Determine when the customer would like to hold the party or group
 - b. Describe the four optimal times for parties
 - i. Fridays – 4-6pm
 - ii. Saturdays – all day
 - iii. Sundays – noon-6pm
 - iv. During the summer – during normal operating hours
 - c. Describe the optimal times for groups
 - i. Groups under 10 – Schedule during normal business hours
 - ii. Groups 10-19 – Schedule whenever client would like to arrive
 - iii. Groups 20 or more – Schedule outside business hours
 - d. Describe flexible times for groups and parties
 - i. During summer, larger groups may be accommodated during business hours
 - ii. During busy nights (Mondays, Tuesdays, Fridays, special event nights, etc.), smaller groups can only be reserved with General Manager’s approval
3. Given a Booking Sheet and a simulated customer who agrees with the recommendations, the performer will schedule a group or birthday party event.
- a. Recall storage location of Booking Sheets
 - b. Indicate what type of group
 - c. Indicate the date of the event
 - d. Indicate the total time of the event including time in Party Room
 - i. Example: 4-6pm for event time and 5:30-6pm for Party Room
 - ii. Example: 2-3pm for event time and 3-3:30pm for Party Room
 - e. Indicate the customer’s name and phone number
 - f. Indicate the number of climbers in the group
 - i. Inform customer that BCG *does not* allow more than 6 climbers for birthday party Package A
 - g. Indicate the average age of climbers
 - i. Inform customer that climbers over 12 years can belay for each other
4. Given a simulated customer who agrees with the recommendation, the performer will obtain a deposit for the party or group reservation
- a. Inform customer that 50% deposit is required to hold event spot
 - b. Inform customer that deposit is transferable, but non-refundable
 - c. Inform customer of payment options
 - i. Credit card over the phone
 - 1. Gather credit card number and expiration date

2. Recall entering process from experience as desk staff employee
 - ii. Drop off check or cash
 - iii. Mail in check or cash
 1. Provide mailing address and/or directions
 - d. Indicate payment method on Booking Sheet
 - i. Write date, amount and type of payment
 - ii. Write invoice number from AAC
 - iii. Write “en route” or “will call back” if payment unconfirmed
 - e. Restate deposit information to customer
 - i. Restate total number of climbers
 - ii. Restate total reservation amount
 - iii. Restate deposit amount
5. Given a simulated customer who has provided a deposit, the performer will secure the customer’s agreement to complete the necessary waivers.
 - a. Define “waiver”
 - b. Describe the terms of the waiver
 - c. Describe who must sign a waiver
 - d. Describe the waiver necessity to the client
 - i. Anyone who climbs must have a waiver signed by a parent or guardian
 - ii. Arriving at the gym with pre-signed waivers speed up event
 - e. Inform customer that waivers are only valid for event date
 - f. Indicate that waivers are available at gym and on website – www.bouldersgym.com
 - i. Provide directions to BCG if picking up waivers
 6. Given a simulated customer who has provided a deposit, the performer will confirm a reservation with a customer
 - a. Remind customer of reservation date
 - b. Remind customer of reservation time
 - c. Remind customer of waiver necessity
 - d. Remind customer of remaining balance
 7. Given a simulated confirmed event, and Booking Sheet, the performer will complete the booking process
 - a. Indicate performer’s name on bottom of Booking Sheet
 - b. Indicate booking date on Booking Sheet
 - c. Indicate any special requests or additional information on Booking Sheet
 8. Given a simulated change to an event reservation and a completed Booking Sheet, the performer will modify the reservation
 - a. Indicate any changes on Booking Sheet in appropriate location
 - b. Indicate changes with performer initials and date of changes

Conducting Certification Tests

Terminal Objective #1: The performer will be able to conduct a **Belay Certification Test** within 15 minutes, adhering to BCG safety policies so the customer does not injure himself or other BCG customers.

Enabling Objectives:

1. Given a job aid, the performer will describe BCG safety policies to a customer.
 - a. Recall appropriate knots
 - b. Recall belay commands
 - c. Recall appropriate belay devices
 - d. Recall appropriate belay techniques
 - e. Recall purpose for safety policies
2. Given a simulated belay certification test, the performer will identify BCG safety infractions during a certification test.
 - a. Define *safety infraction*
 - b. Recall BCG safety policies
 - c. Identify consequences for allowing safety infractions
3. Given a job aid and a checklist, the performer will be able to guide the customer in completing the belay certification test. The test must be completed in no more than 10 minutes.
 - a. Instruct climber to fill out waiver on reverse of Certification Test
 - b. Articulate requirements for passing to climber before test
 - c. Pass or fail climber based on performance and BCG policies
 - d. Provide customer service by correcting climber infractions and offering opportunity to retest on another day
4. Given a completed belay certification checklist, the performer will document certification test results according to BCG policies.
 - a. Define BCG test reporting policies
 - b. Apply test reporting policies

Terminal Objective #2: The performer will be able to conduct a **Lead Certification Test**, within 15 minutes, adhering to BCG safety policies so the customer does not injure himself or other BCG customers.

Enabling Objectives:

1. Given a job aid, the performer will describe BCG safety policies to a customer.
 - a. Recall appropriate knots
 - b. Recall belay commands
 - c. Recall appropriate belay devices
 - d. Recall appropriate belay techniques
 - e. Recall purpose for safety policies
2. Given a simulated lead certification test, the performer will identify BCG safety infractions during a certification test.
 - a. Define *safety infraction*

- b. Recall BCG safety policies
 - c. Identify consequences for allowing safety infractions
- 3. Given a job aid and a checklist, the performer will be able to guide the customer in completing the lead certification test. The test must be completed in no more than 15 minutes.
 - a. Instruct climber to fill out waiver on reverse of Certification Test
 - b. Articulate requirements for passing to climber before test
 - c. Pass or fail climber based on performance and BCG policies
 - d. Provide customer service by correcting climber infractions and offering opportunity to retest on another day
- 4. Given a completed lead certification test, the performer will document certification test results according to BCG policies.
 - a. Define BCG test reporting policies
 - b. Apply test reporting policies

Practice Activities

The practice activities are based on the previously stated enabling objectives, which will culminate in the attaining of the terminal objectives. For the procedures of *Booking Groups* and *Conducting Certification Tests*, the activities focus on applying and demonstrating knowledge in context-relevant simulations.

Booking Groups

Practice Activity 1: Group or Party?

15 Minutes

Given several examples of groups and birthday parties, the performers will indicate whether the reservation should be a *Group* or a *Birthday Party*. During this activity, the instructor(s) will be looking for the performers to recognize a customer's needs and the best reservation option.

Practice Activity 2: Tell Me More

30 Minutes

In a supervised group simulation, the performer will provide a simulated customer with essential group or birthday party information before asking for a reservation. The performer must provide the following information to the customer:

- Package or group pricing
- Preferred times for parties or groups
- Deposit information
- Waiver information
- BCG website address

During this activity, the performers will be assisting each other and providing alternate questions that customers might ask. The performers must be able to understand the customer's needs and provide them the

most appropriate solution for their needs. The performer must ask the client to confirm the reservation before proceeding to activity three.

Practice Activity 3: Book It

45 minutes

In a supervised group simulation with a sample Booking Sheet, the performer will demonstrate booking a group or party based on the stimuli provided by the instructor or fellow performers. Each performer will be in a different simulation, so the performers can demonstrate understanding instead of repeating a procedure.

Conducting Certification Tests

Practice Activity 1: Boulders Climbing Gym Rules

10 Minutes

In a group setting, the performer will identify and state the purpose for BCG safety policies. The performer must identify acceptable belay devices, knots, belay commands, and belay techniques.

During this activity, the instructor will be looking for the performer's understanding of BCG policies and why the policies are important.

Practice Activity 2: What's Wrong With This Picture? 30 Minutes

In a group scenario setting, the performer will identify violations of BCG safety policies that would lead to a failed certification test. A pair of climbers would demonstrate common climbing practices, sometimes following BCG procedures, and sometimes not. The performer will need to identify when a policy has been violated and when to correct the climber. The instructor will be looking for correct identification of BCG policy violations and how the performer perceives the line between "acceptable" and "unacceptable." The instructor will be looking for the performers to collaborate to form a clear understanding of "acceptable" and "unacceptable" practices.

Practice Activity 3: Test Me

45 Minutes

In a supervised simulation with fellow group members acting as climbers, the performer will conduct a complete certification test. The performer will need to demonstrate adherence to BCG safety policies when choosing to pass or fail the climber. All simulations will be different, allowing each performer to learn from each other.

The instructor will be looking for communication between the performer and the climbers, and how the performer responds to improper safety procedures. The instructor will also be looking for how a performer deals with an upset customer if the performer must fail the climber.

Practice Activity 4: Record Results

5 Minutes

In a supervised simulation with a completed certification test, the performer will record the test results according to BCG policies. This procedure will be broken down into 2 steps:

Step 1: Record test results in ACT!

Step 2: File paperwork

The instructor will be looking for how a performer completes the testing process, even if the climber failed the test.

Testing and Evaluation Methods

The evaluation of this lesson will focus on the overall effectiveness of teaching and learning the procedure of booking groups or conducting certification tests. In order to properly evaluate the effectiveness of the lessons, varying degrees of formative, summative and confirmative evaluations will be used. It will be essential for each evaluation method to measure according to the standards established by the instructional objectives.

The formative evaluation will measure the effectiveness of the instructional materials and performer comprehension before formal implementation of the instructional program. JC and BCG will evaluate each instructional program through pilot tests and will look for program usability, time management, and content. Individuals involved in the test will fill out a provided survey for opinions on the instructional presentation and activities.

The performers will fill out a survey as a means of determining the value of the instruction. The survey for *Booking Groups* will consist of 4 open-ended questions, while the survey for *Conducting Certification Tests* will only consist of 3 open-ended questions. Example questions are: What did you get out of this instruction? What would you change about the instruction? What was your favorite part of the instruction?

Summative evaluation will determine the learners' overall ability to achieve the learning objectives, in an effective, efficient and cost-effective manner. Since the terminal objectives describe elements that are mostly skill-related, the most effective summative evaluation of the effectiveness of the lesson will be by observing the accomplishment of all of the terminal objectives in corresponding practice activities. This evaluation will be the easiest to gather data since it parallels the skill-based formative evaluation. The performers can evaluate the program efficiency by completing a simple survey after completion of the program. BCG's General Manager will evaluate the efficiency and cost-

effectiveness based on how much time the instruction consumes, and whether all of the performers were able to effectively demonstrate a change in performance.

The instructor will only supply one formal test, which he/she will administer during the *Conducting Certification Tests* training program. However, the test will not be formally graded, allowing the performers to evaluate their own knowledge and progress. The other practice activities will also not be formally graded, but will allow the performers to evaluate and/or comment on each other's behavior using positive reinforcement.

The General Manager of Boulders Climbing Gym will be responsible for confirmative evaluation. He will compare the customer service and revenue before the instruction to after the instruction to determine if the instruction holds long-term value for the organization.

Instructional Materials

Jorgensen Consulting will create a variety of instructional materials for BCG's *Booking Groups* and *Conducting Certification Tests* programs. These will include a set of teaching tools for instructors and learning tools for the performers. JC will hand over all guides, aids and other tools to BCG, including an overview letter that will explain the instructional process.

Instructor's Guides

JC will create instructor guides with the primary intention of making teaching the content as simple and straightforward as possible. Someone with a considerable amount of experience in the subject matter will deliver the content, so the guide will act as assistance, rather than absolute law. The guide will also need to be reused over the course of several years. With these principles in mind, the Instructor's Guides should therefore:

- Appear small, simple, appealing through the proper use of graphics, colors, fonts, typeface, etc.
- Be of a reasonable quality, i.e. it cannot use thin paper that is easily torn or of a poor-quality binding that can easily be bent or rendered unusable.
- Consider the setting it will be used in, i.e. primarily it will be used in a climbing gym so it needs to be easily placed on a chair, counter, rock structure, or even the floor if necessary. Therefore, it cannot be big and

bulky but will be light and small. It will also be able to be easily read from a variety of distances and angles.

The Instructor's Guides will start with an include:

1. An introduction – will include a brief overview of the goals of instruction, the learning objectives, the instructional context, and the format of the content presentation
2. A graphical representation of the learning tools at the instructor's disposal, listed chronologically
3. Motivational tactics
4. Instructional content – will be presented in bullets, because of the instructor's current knowledge of the content
5. Practice activities
6. Evaluation materials – checklists, answer guides, performer observations

Both instructor guides will be less than 30 pages.

Learning Aids

The instructor will distribute various learning aids at appropriate times during the programs. The general characteristic of the learning aids is that they will be color-coordinated according to the nature of the program. BCG uses color-coordination as part of their filing system, and the colors of the aids will be identical to the paperwork used in an actual event booking or certification test. For example, Belay Certification Tests are **LIGHT BLUE**, so the learning aid for that program will also be **LIGHT BLUE**.

The learning aids will also include materials so the performers can evaluate the instructional program.