



Program Evaluation

Savvy Service

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EXECUTIVE SUMMARY

Savvy Service training is a customer-service training required by Albuquerque Credit Union to be taken by all staff at all levels after 30 days of hire. This training goes over Albuquerque Banking's specific service model known as Savvy Service to be utilized for external and internal customer service. Training resource hours dedicated to teaching this course are expected to increase by at least 57% by the end of the fourth quarter of 2023.

This training evaluation determined the following:

- Staff report indicates overall confidence in applying taught skills, though some suggest refining scenario activities to better match daily job experiences.
- Staff demonstrate proficiency in skills after training

This training evaluation identified the following recommendations:

- Continue assessing staff behaviors in written communication at 30 and 90 days after training
- Observe customer service satisfaction scoring one year after training has reached 95% of staff.

STATEMENT OF PURPOSE

The purpose of this evaluation is to ensure that the customer-service training provided to staff at Albuquerque Banking is effective in promoting customer service behaviors in staff that align to the Savvy Service model. With a steep increase in projected resource hours to be spent on this training by end of year 2023, it is recommended that the training be evaluated for effectiveness in teaching the bank's service model. If effectiveness standards are not met, this training can be revised and reimplemented to ensure resource hours are not wasted in future implementations of this training.

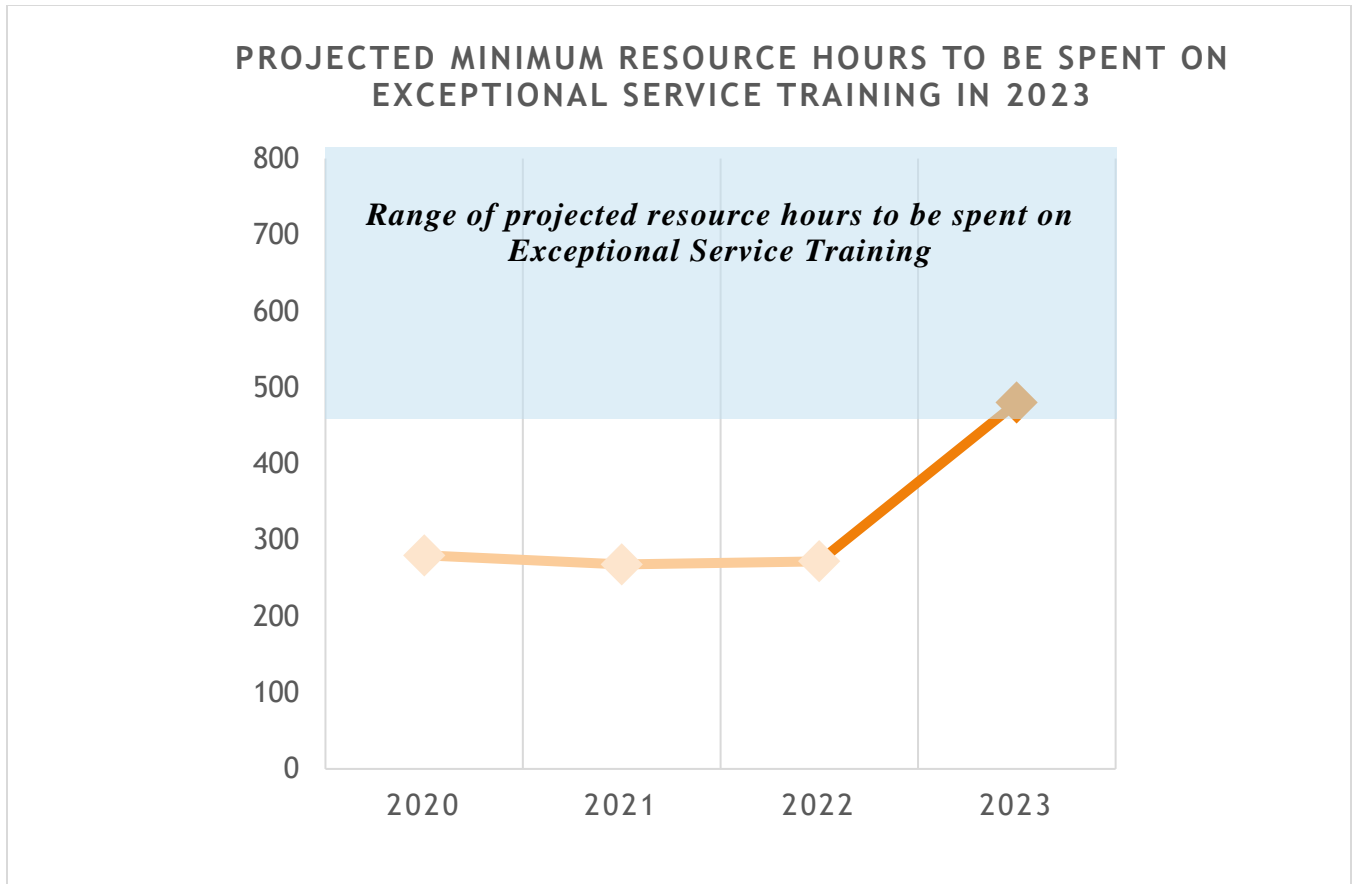


FIGURE 1. GRAPH DEPICTS RESOURCE HOURS TO TOTAL TO A MINIMUM OF 500 RESOURCE HOURS SPENT ON THIS TRAINING BY END OF YEAR 2023.

BACKGROUND INFORMATION

Savvy Service training is a customer-service training required by Albuquerque Banking to be taken by all staff at all levels after 30 days of hire.

The Savvy Service Model breaks down each customer communication into four key components:

1. Build rapport
2. Ask clarifying questions on any request or reiterate the request back to the customer
4. Offer additional services or otherwise enhance the request
5. Show appreciation

This course is approximately 4 hours in length and is an instructor-led course that is taught both in person and virtually. This course is taught once per quarter and typically has about 25 to 35 staff in a given “class”.

The evaluation below is based off of a class taught in an in-person environment that totaled to approximately 30 staff.

DESCRIPTION OF THE EVALUATION STRATEGY

LEVEL ONE: LEARNERS' REACTIONS

Kirkpatrick describes learner reactions as the degree in which learners find the training meaningful, engagement and relevant to their jobs (Kirkpatrick & Kirkpatrick, 2016).

A survey was provided to learners three days after training was completed in order to reduce potential positivity bias and allow learners time to reflect on their training experience. This survey was conducted through the use of Google Forms.

The goal for learner reactions was to have an overall percentage in the following:

Superior	Equal to or greater than 90% (or 0% if met by 'Acceptable' Standards)
Acceptable	Equal to or greater than 90% (or 0% if met by 'Superior' Standards)
Unacceptable	Equal to or less than 5%
Alarming	0%

FIGURE 2. FIGURE REPRESENTS STAKEHOLDER EXPECTATIONS ON LEARNER REACTION SURVEY RESULTS.

LEVEL ONE: DISCUSSION OF RESULTS

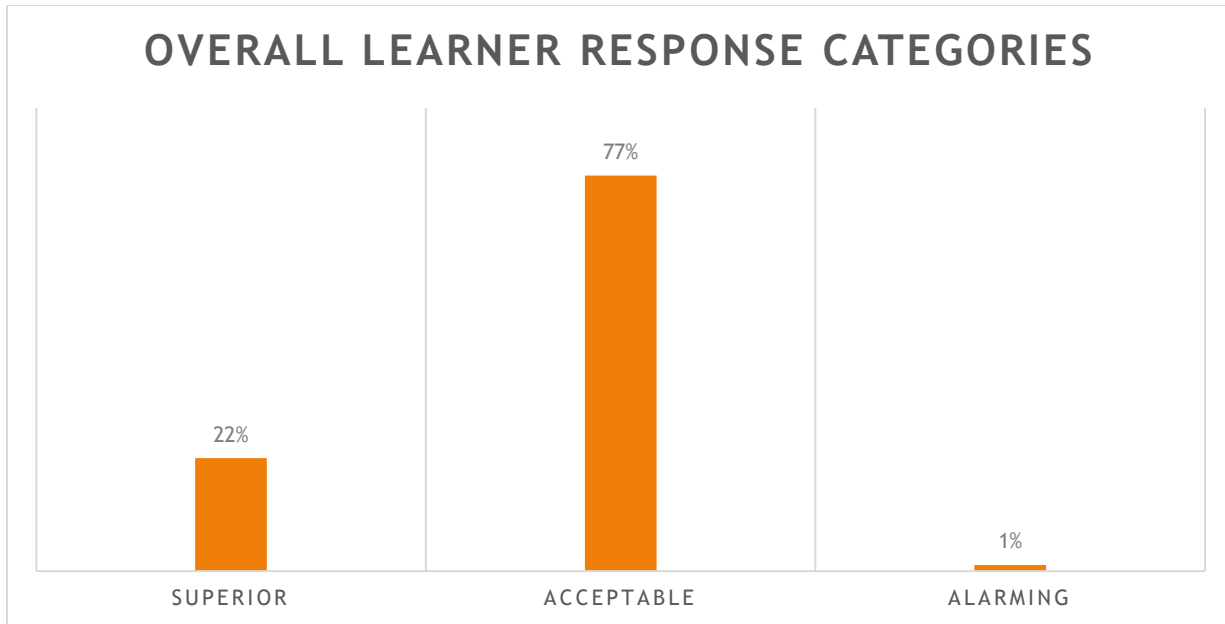


FIGURE 3 GRAPH REPRESENTS OVERALL LEARNER RESPONSES WITHIN CATEGORIES CONSIDERED SUPERIOR, ACCEPTABLE OR ALARMING. THESE RESULTS ARE SUMMATIVE ACROSS ALL QUESTIONS ASKED IN LEARNER REACTION SURVEY.

Overall, reactions from learners fell under the “Acceptable” range with some area within the “Superior” range. One response from this survey fell under the “alarming” category. This was regarding scenarios, the learner responded that the scenarios did not match up with their job role. The learner left a comment at the end of the survey that expanded this response. The response stated:

I work in the [Information Systems] department, so the scenarios were applicable, but, the scenarios presented were very customer-facing focused with some general back office scenarios. I wish they had one specifically for my department. I do feel this training prepared me to address customer service in my role, however.

This feedback brings awareness to potential additions of scenarios that prioritize specific non-customer facing roles.

Regarding learner reactions, it can be assumed that learners overall feel confident after this training, feel they have the tools to apply the learning to their role with some or no help, and that they are motivated to apply this learning to their job role.

<i>Superior</i>	<i>Met</i>
<i>Acceptable</i>	<i>Met</i>
<i>Unacceptable</i>	<i>Met</i>
Alarming	UNMET

FIGURE 4 STAKEHOLDER EXPECTATIONS WITH ACTUAL RESULTS FROM LEARNER FEEDBACK SURVEY. TWO OUT OF FOUR EXPECTATIONS WERE MET.

ANALYSIS

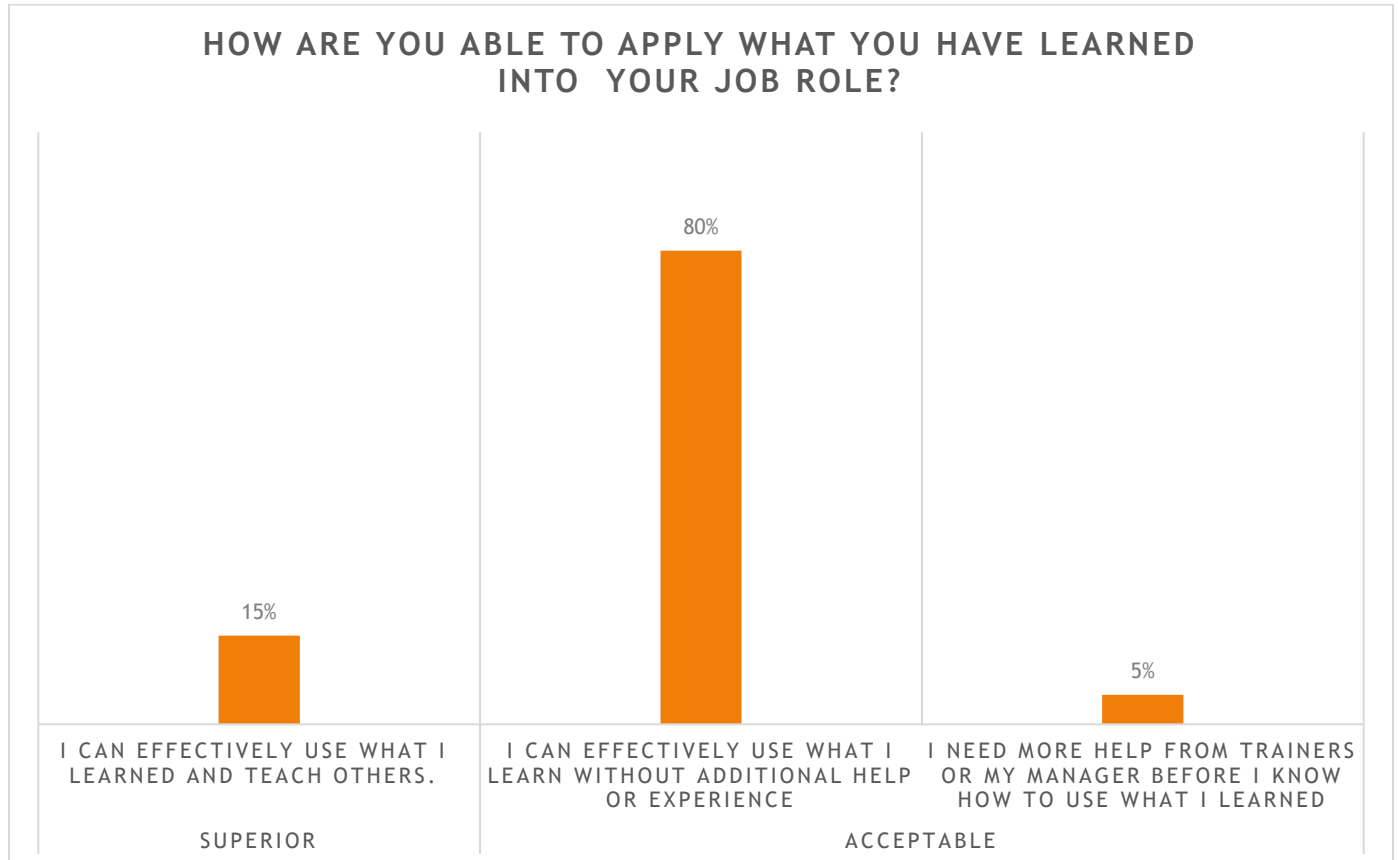


FIGURE 5 GRAPH DEPICTS TOTAL RESPONSES FOR QUESTION “HOW ARE YOU ABLE TO APPLY WHAT YOU HAVE LEARNED INTO YOUR JOB ROLE.”

It can be assumed that the majority of learners have a perception that they can utilize what they learned from their training with 5% of learners stating that they need additional assistance from subject matter experts. This is considered an acceptable response due to the high amount of learners that are still within their 90 days of employment.

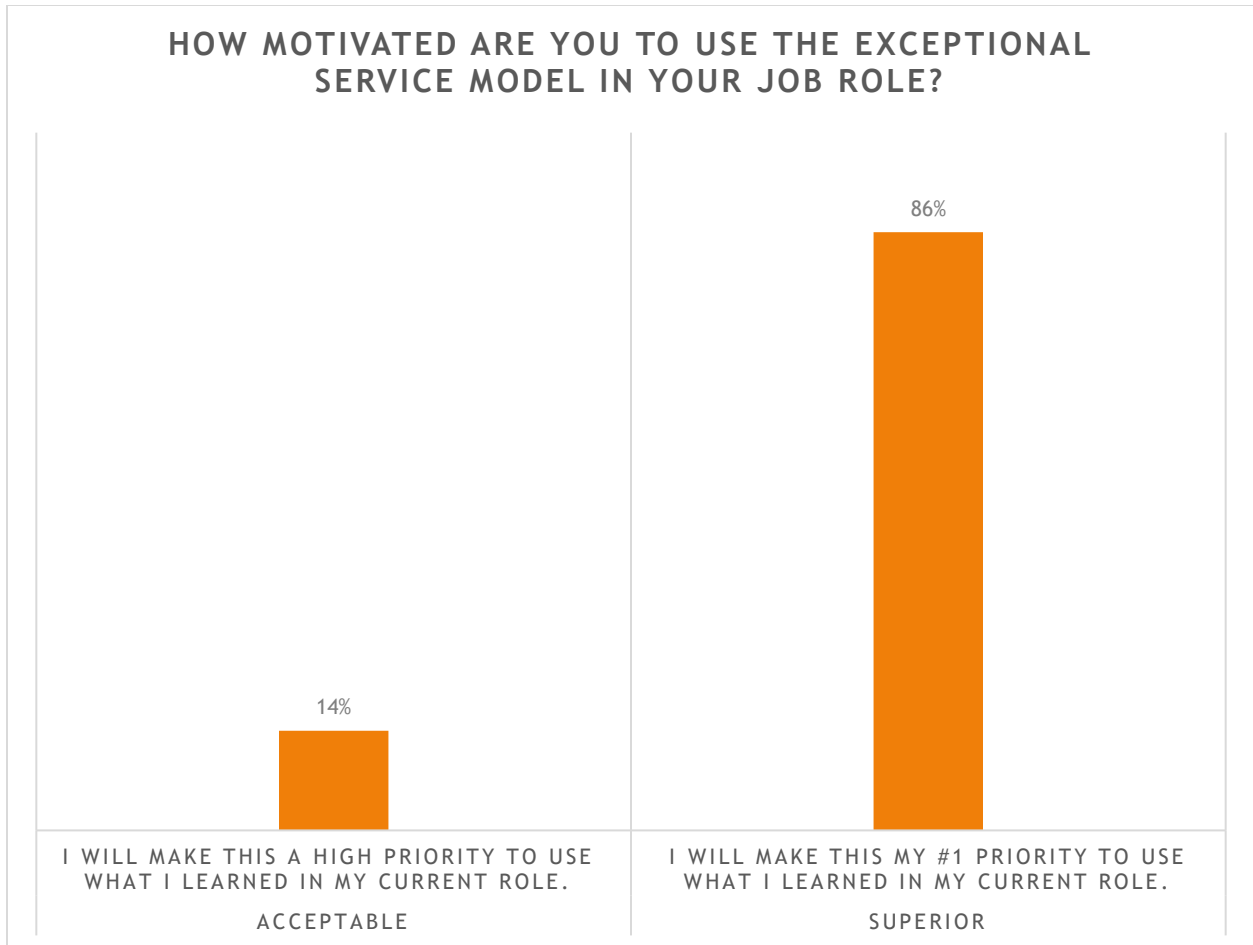


FIGURE 6 GRAPH DEPICTS SUMMARY OF RESULTS FOR QUESTION “HOW MOTIVATED ARE YOU TO USE THE SAVVY SERVICE MODEL IN YOUR JOB ROLE”

Most learners stated that they will make administering skills taught in this training a #1 priority in their current role.

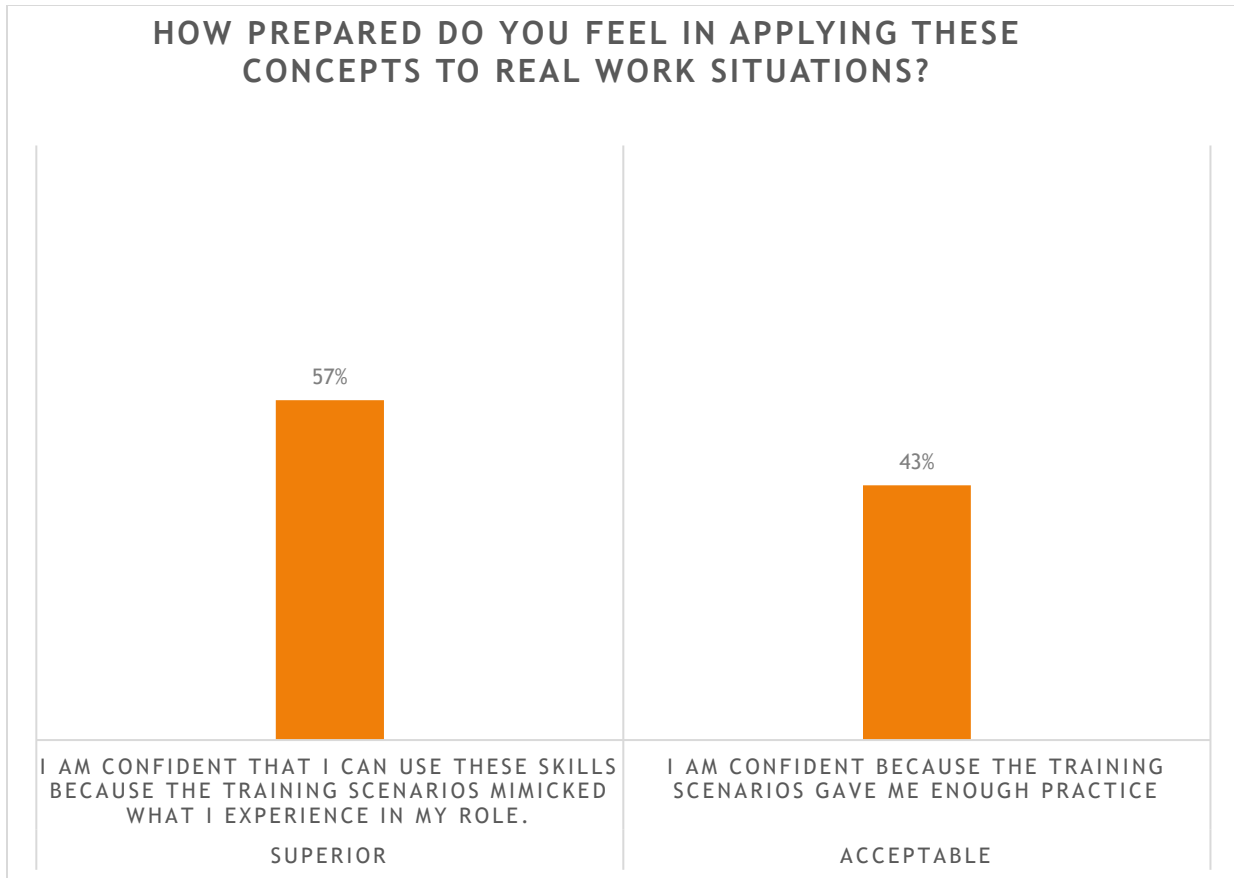


FIGURE 7 GRAPH DEPICTS SUMMATIVE RESPONSES WITHIN THE PROPOSED STANDARDS TO THE QUESTION “HOW PREPARED DO YOU FEEL IN APPLYING THESE CONCEPTS TO REAL WORK SITUATIONS?”.

Scenarios created for this training met applicability to learner job roles and the training provided enough time for learners to go through each scenario during this training.



FIGURE 8 CHART DEMONSTRATES A RANGE OF RESPONSES FOR QUESTION "HOW PREPARED DO YOU FEEL IN APPLYING THESE CONCEPTS TO REAL WORK SITUATIONS?"

Facilitation and content layout appeared to be the most commonly selected response to what aided learners. Scenario practice time and applicability were the second and third most common selections by learners to what aided their learning.

As mentioned in the Discussion, one learner selected an Alarming response and followed up with a comment that expanded on their confidence in applying the skills learned as well as expanding on criticism that the scenarios may not be appropriately tailored to encompass back office positions.

It is recommended that scenarios are to be reviewed with at least one scenario developed per department.

During class, facilitators are provided an attendance sheet that has information on each learner's department, job title and worksite. It is recommended that facilitators ensure that all departments in training have a relevant scenario to discuss that is similar or directly relates to their job role.

Upon implementing this recommendation, further analysis of survey results shall be conducted to determine if additional Alarming responses in this category maintain above 0%.

A limitation of this current evaluation is the evaluation does not capture the potential variances between learners who took this training in-person versus learners who took this training virtually. It is recommended that both modalities be assessed to ensure that staff in a virtual environment are displaying similar survey results as the staff in an in-person environment.

SAMPLE INSTRUMENT
(Adapted from Thalheimer, 2022)

Question 1		
Question Rationale: Used to determine how learners feel they are prepared to apply what they have learned to their job role.		
How are you able to apply what you have learned into your job role? Choose one option that best describes your perspective:		Proposed Standards <i>Not shown to learners</i>
A	My current role does NOT enable me to use what I learned.	Alarming
B	I am still unsure of what I need to do or why I need to apply what I learned.	Unacceptable
C	I need more help from trainers or my manager before I know how to use what I learned	Unacceptable
D	I need more experience to effectively use what I learned	Acceptable
E	I can effectively use what I learn without additional help or experience	Acceptable
F	I can effectively use what I learned AND teach others.	Superior / Overconfident
<i>Note: Learners are NOT shown the text in the gray cells of this table.</i>		

Question 2		
Question Rationale: Used to determine what aspects of the training helped or hindered learners gain understanding of the course material.		
How do you feel the course did or did not prepare you for providing Savvy Service? Select any statements that apply.		Proposed Standards <i>Not shown to learners</i>
A	I was given helpful feedback on questions or during scenarios.	Superior

B	I was NOT given helpful feedback on questions or scenarios.	Alarming
C	The scenarios presented were similar to what I experience at work.	Acceptable
D	The scenarios presented were NOT similar to what I experience at work.	Alarming
E	I received enough time to go through each scenario in a meaningful way.	Acceptable
F	I was not able to complete most or all of the scenarios due to time constraints.	Alarming
G	Most or all concepts were explained in a way that made sense to me.	Acceptable
H	Most or all concepts were not explained in a way that helped me learn.	Alarming
<i>Note: Learners are NOT shown the text in the gray cells of this table.</i>		

Question 3		
Question Rationale: Used to determine how motivated the learners feel in applying concepts from training to their job role.		
How motivated are you to use the Savvy Service model to your job role?		Proposed Standards <i>Not shown to learners</i>
A	My current role does not enable me to use what I learned.	Alarming
B	I do not think what I learned will be useful in my current role.	Alarming
C	I will make this a low priority to use what I learned in my current role.	Unacceptable
D	I will make this a moderate priority to use what I learned in my current role.	Unacceptable
E	I will make this a high priority to use what I learned in my current role.	Acceptable
F	I will make this my #1 priority to use what I learned in my current role.	Superior
<i>Note: Learners are NOT shown the text in the gray cells of this table.</i>		

Question 4		
Question Rationale: Used to determine how confident the learners feel regarding the application of the material taught in this course.		
How prepared do you feel in applying these concepts to real work situations ?		Proposed Standards <i>Not shown to learners</i>
A	I am confident that I can use these skills because the training scenarios mimicked what I experience in my role.	Superior
B	I am confident because the training scenarios gave me enough practice.	Acceptable
C	I am confident even though the training scenarios did not give me enough practice	Unacceptable
D	I am confident but this training does not relate to my job role.	Alarming
E	I am not confident because this training does not relate to my job role.	Alarming
F	I am not confident in applying these skills.	Alarming
<i>Note: Learners are NOT shown the text in the gray cells of this table.</i>		

Question 5		
Question Rationale: Used to determine other factors in learning that learners determine as helpful or unhelpful that are not previously addressed on this survey.		
What other comments, feedback, concerns or questions do you have?		Proposed Standards <i>Not shown to learners</i>

	N/A
<i>Note: Learners are NOT shown the text in the gray cells of this table.</i>	

LEVEL TWO: LEARNING

Kirkpatrick designates Level 2 Learning as the extent in which learners have improved their knowledge and/or skills after a training program (Kirkpatrick & Kirkpatrick, 2016).

This course utilized scenarios to teach learners to implement the steps of the Savvy Service Model across verbal and written communication. To assess how learners responses to written communication changed across the course, a pre-test at the beginning of the course and a post-test at the end of the course was utilized. Learners received a pre-test and post-test prioritizing implementation of the Savvy Service Model via written communication. Learners were given the option to handwrite or type a response to the communication. Two different options for a pre-test and post-test were provided to learners based on their department. Customer-facing staff were provided an email scenario from a customer requesting common information such as wanting to open an account or seek out services. Back-office staff pre and post tests were designed to use scenarios common among any back-office staff despite department. This includes scheduling meetings, seeking out or seeking out department-specific information.

Ideally, learners would have received a pre-test and post-test covering verbal communication as well as written communication. This class was instructor led and resources were not available to test all learners in a private area on their verbal communication during the beginning of class and end of class.

Accommodations were offered during class signups (2 weeks prior to class implementation) to adjust this pre-test and post-test environment to a verbal read-aloud of the material with the learner's choice of providing a verbal or written response. No learners requested this accommodation during this class. This accommodation will continue to be offered to students across classes.

DISCUSSION

The following criteria was determined to indicate a successful knowledge assessment across learners:

Superior	91% - 100% passing
Acceptable	81% - 90% passing
Unacceptable	71% - 80% passing
Alarming	Less than or equal to 70% passing

FIGURE 9 TABLE DEPICTS STAKEHOLDER EXPECTATIONS OF AVERAGE SCORES DISPLAYED BY LEARNERS DURING POST-TEST CONDITIONS.

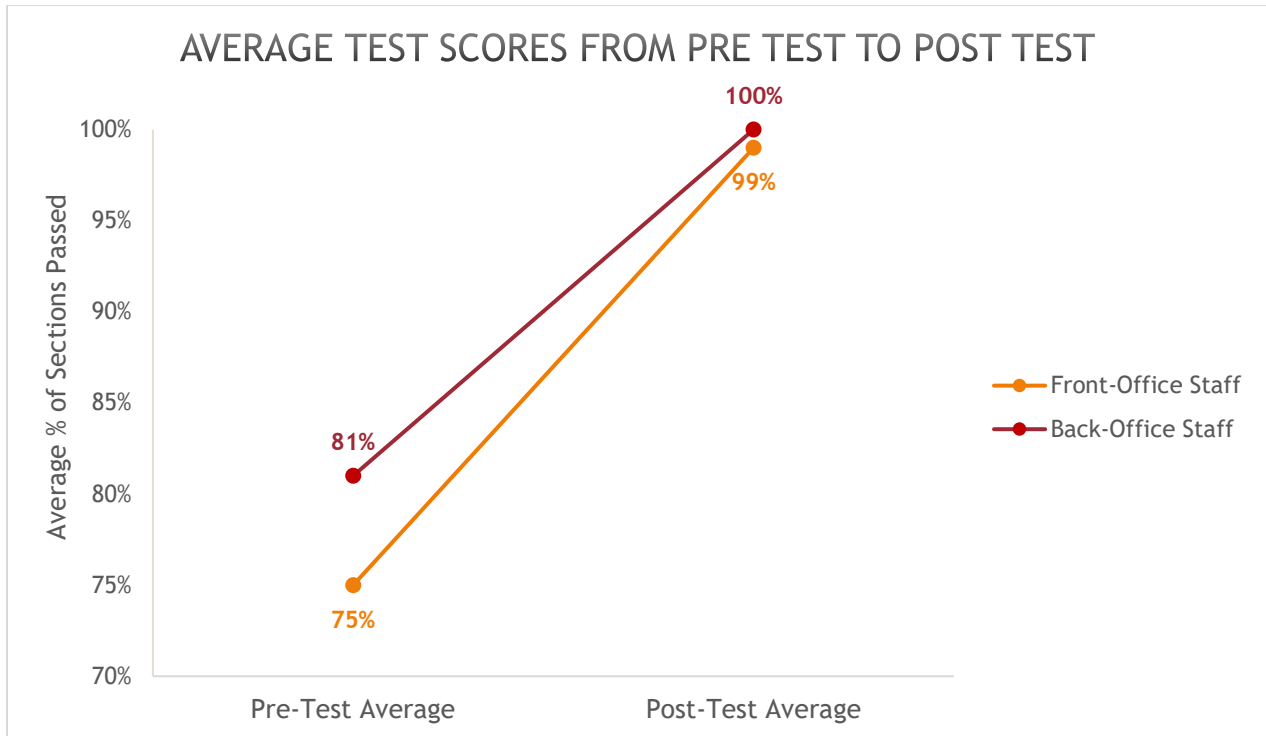


FIGURE 10 CHART DEPICTS AVERAGE TEST SCORES OF FRONT OFFICE STAFF AND BACK OFFICE STAFF ACROSS THE PRETEST GIVEN PRIOR TO TEACHING CLASS CONTENT TO THE POST-TEST GIVEN AFTER THE CLASS CONTENT.

Based on average test scores before and after class, front-office staff would not meet Albuquerque Banking standards of responding to customer emails without Savvy Service Skills training.

During pre-tests, back-office staff on average received average scores within the “acceptable” range of responses. Back-office staff also increased their average scores to the superior score of 100% across trainees.

Overall, post-test conditions show “Superior” scoring across both groups of trainees.

ANALYSIS

Front office staff received average scores within the “unacceptable” range of performance when answering email requests. Front office staff commonly omitted opportunities to add value or otherwise offer additional services. The second most common missed area during the pretest was providing an empathy statement to requests such as congratulating the customer wishing to buy their first house or thanking the customer for considering opening an account at Albuquerque Banking. Back-office staff received average scores within the “acceptable” range of performance when answering email requests. Like front office staff, back-office staff commonly missed opportunities to add value or otherwise offer additional services in their email responses. Both groups demonstrated a 99%-100% passing average when provided the post-test.

While this knowledge assessment shows that both groups display “Superior” scoring after class, it is strongly recommended that behavioral assessments and retention checks are conducted to ensure that this knowledge transfers to actual employee performance.

Average scores were broken down by front office staff positions and back office staff pay grade “levels” to determine if all staff at Albuquerque Banking would benefit from this training through increasing Albuquerque Banking’s knowledge of Savvy Service.

Front office staff that have currently gone through this training were broken into three roles. Customer Service Representatives typically have zero experience working within the financial industry and are considered “entry level” employees. Tellers may have about 1 year of experience within the financial industry. Advisors may have anywhere from 1-3 years’ experience in the financial industry.

Staff entering Albuquerque Banking as a Advisors on average displayed “Acceptable” scores during the pretest, which may indicate staff entering this role may not need this training.

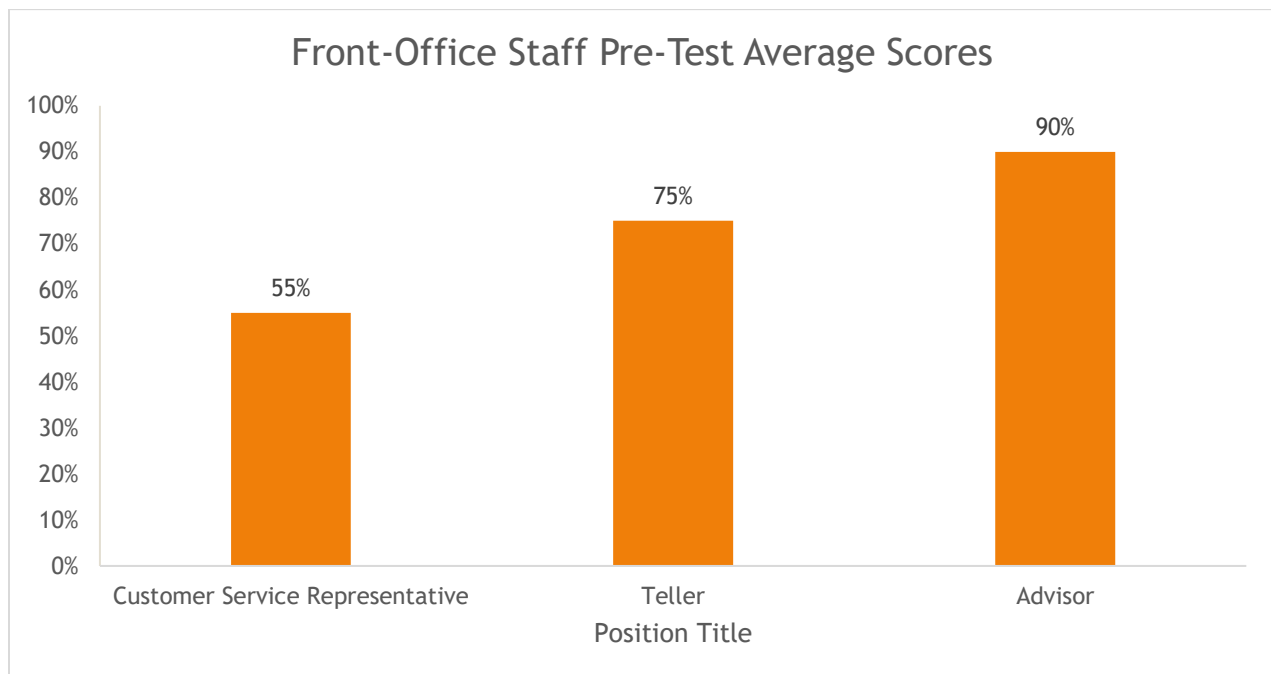


FIGURE 11 CHART DISPLAYS COMPARISON OF FRONT OFFICE STAFF AVERAGE SCORES DURING TRAINING'S PRE-TEST.

Back office staff positions have a wide variety of role types and was easier to classify on pay grade levels rather than position levels, unlike front-office staff. Pay grades go up from S8 – S15 with S8 levels being associated more with “entry roles”.

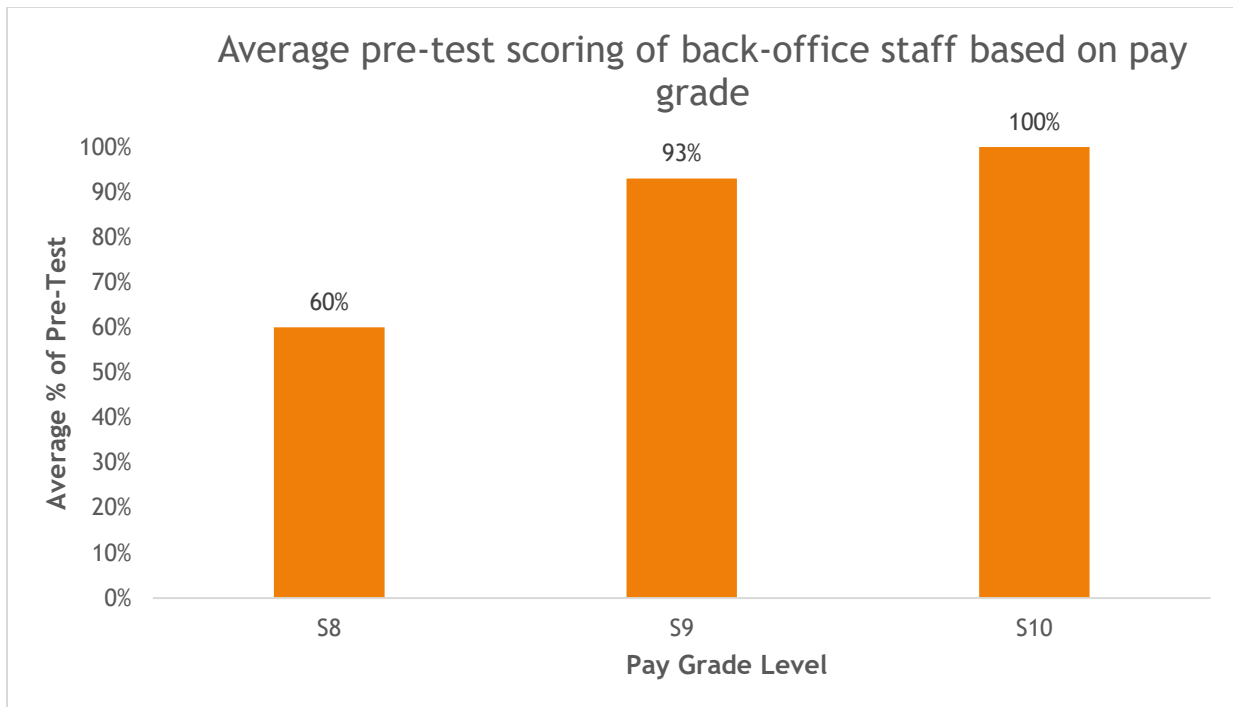


FIGURE 12 STAFF WHO FELL INTO S9 AND S10 PAYGRADES SCORED AVERAGES WITHIN THE RANGE OF ACCEPTABLE AND SUPERIOR SCORES.

During pre-tests, on average, staff within the S9 and S10 pay grades display Superior scores. Based on knowledge assessment alone, it may not be necessary to have back-office staff above S8 levels to take Savvy Service Training.

Additionally, as mentioned in the Level One section, a limitation of this evaluation is that the virtual environment was not able to be captured. It is recommended that the virtual modality of this training go through a Level Two evaluation to ensure that there are little to no differences in learner range of scoring at post test levels during Level Two.

SAMPLE INSTRUMENTS

Two sets of pre-test and post-tests were developed depending on the type of customer each staff would be interacting with in their daily job. Customer-facing staff are considered any staff who works within a branch at the Albuquerque Banking and engages with individuals who currently have an account with Albuquerque Banking or are considering an account with Albuquerque Banking.

Back-Office staff are considered any staff who does not work directly with individuals who currently have an account with Albuquerque Banking or are considering an account with Albuquerque Banking. Back-

Office staff instead engage in customer service with any individual that is employed by Albuquerque Banking.

PRE-TEST CUSTOMER-FACING STAFF EMAIL:

Hello,
I would like to open an account at Albuquerque Banking. I want to make an appointment with someone to help me with opening an account.
Thank you,
Gabriel Montoya

PRE-TEST BACK-OFFICE STAFF EMAIL:

Good morning,

I am having trouble locating the reporting feature for your department. If possible, can you assist me by end of day today? I have a meeting in two days that relies on information generated from this report.

Thanks,

Liam Parra

POST-TEST CUSTOMER-FACING STAFF EMAIL:

Good afternoon,
My wife and I are first-time home buyers. We would like to be able to go over the different loan rates Albuquerque Banking has to offer.
Sincerely,

Cassandra Smith-Garcia

POST-TEST BACK-OFFICE STAFF EMAIL:

Hello,

Hope your day is going well. I am running into issues scheduling meetings with the following individuals:

Steven Lucero
Kristin Pacheco

Paul Nguyen

Alice Coleman

I need these meetings to occur between next week and the week after if possible.

Best,

Sandra Reed

A rubric was utilized to determine appropriate use of the Savvy Service model as it relates to written communication.

RUBRIC FOR PRE AND POST TESTS

Rubric for pre and post tests		
Section 1: Build rapport		
Section Steps	<i>Write learner response or 1–5-word description</i>	<i>Circle, Checkmark or Highlight Yes or No</i>
	Greeting used	Meets Criteria

<p>1. Begins e-mail with professional greeting. Examples: "Hello", "Hello [first name]", "Good morning", "Good afternoon" Non-examples: "Hey", "[First name] – ", "Hi"</p>		Yes	No
	Variable Identified:	Meets Criteria	
<p>2. Identifies variables influencing request.</p> <ul style="list-style-type: none"> · Pre-Test Customer-Facing Staff Email Variables: <ul style="list-style-type: none"> o New Customer wanting an account · Pre-Test Back-Office Staff Email: <ul style="list-style-type: none"> o Cannot find resource on department's page · Post-Test Customer-Facing Staff Email: <ul style="list-style-type: none"> o First time home buyers · Post-Test Back-Office Staff Email: <ul style="list-style-type: none"> o New staff trying to schedule their intro meetings with their department 		Yes	No
	Statement used:	Meets Criteria	
<p>3. Uses an appropriate empathy statement that relates to the variable</p> <p>Examples of empathy statement: Variable: New Customer wanting an account Example Statement (Positive): We are excited to help you open this account.</p> <ul style="list-style-type: none"> o New staff trying to schedule their intro meetings with their department 		Yes	No

		Total Sections Meeting Criteria
Total " Yes"		3
Criteria to pass must have 2/3 "Yes"	Passed Section?	Passed
		Did not Pass

Section 2: Ask clarifying questions and / or reiterate the request back to the customer

Clarifying Question Definition: any question that the response requests that relates to the subject matter of the email and has not been previously stated.

<ul style="list-style-type: none"> · Pre-Test Customer-Facing Staff Email Example: <ul style="list-style-type: none"> o New Customer wanting an account Examples: Questions around the type of account, preferred availability for an appointment o New Customer wanting an account Non-examples: Any question that is not directly related to request such as Questions around personhood, questions about who they are banking with currently 	Clarifying Question:	Meets Criteria	
		Yes	No
<p>Reiterate the Request Back to the Customer Definition: A statement that includes correct request and what steps the writer will complete to address request</p>	Request Identified by Writer:	Request Correctly Identified?	
		Yes	No
	Action Plan identified by writer:	Action plan written?	

		Yes	No
			Total Criteria
Total "Yes"			3
Criteria to pass must have 2/3 "Yes"	Passed Section?	Passed	Did not Pass
Section 3: Offer additional services or otherwise enhance the request.			
Examples:	Value Added:	Meets Criteria	
Provides tutorial on how to access request information in the future Provides additional information related to request		Yes	No
			Total Criteria
Total "Yes"			1
Criteria to pass must have 1/1 "Yes"	Passed Section?	Passed	Did not Pass
Section 4: Show appreciation.			
Examples:	Value Added:	Meets Criteria	
"Thank you", "I look forward to speaking with you again!", "I appreciate...."		Yes	No
			Total Criteria
Total "Yes"			1
Criteria to pass must have 1/1 "Yes"	Passed Section?	Passed	Did not Pass
	Total Score in "Yes" Category:		8

Savvy Service

	Total Passed Sections:		4
	Overall Pass? (Must have 0 'no pass')	Yes	No

LEVEL THREE: BEHAVIOR

Kirkpatrick describes Level Three: Behavior evaluation as the degree in which learners apply the knowledge or skills taught in training to their job role (Kirkpatrick & Kirkpatrick, 2016). After 30 days of completing the training, learners' supervisors will be asked to share three of the most recent service tickets or customer emails the learner has completed.

Utilizing a similar rubric to the knowledge assessment, the instructor will evaluate the first most recent email or service ticket that the learner completed. The second two emails can be evaluated under the following conditions:

1. The first email by external or internal customer is not a request for service.
2. The request is unclear to the grader or appears to refer to a previous context the grader is not clear on

DISCUSSION

It is recommended that a behavioral assessment is to be conducted to ensure that knowledge increases in staff are correlated with actual performance. Without a behavioral assessment, Albuquerque Banking will be unable to determine if Savvy Service Training adequately prepares staff across levels and positions to comply with Albuquerque Banking's service standards. While assessing learner knowledge identified that this training prepared staff in understanding the concepts of Albuquerque Banking's service model, this is not enough to ensure the training is effective, nor is it enough to justify increasing training resource hours to ensure all staff receive this training upon onboarding.

Additionally, evaluating behavioral trends across positions may identify gaps in knowledge and behavior in certain positions, allowing for the training department to potentially identify and develop training-based solutions to target staff at risk of not meeting Albuquerque Banking's service standards. This would be beneficial to ensure that new staff are demonstrating the skills they need to be successful and are provided the necessary resources to engage in successful skills within the first 90 days of employment.

EXAMPLE ANALYSIS

The following proposed assessment of behavior will be used to identify staff retention and generalization of training knowledge, thus, a change in behavior as it relates to written communication.

Overall results should be analyzed for behavior change under the following standards:

Superior	91% - 100% passing
Acceptable	81% - 90% passing
Unacceptable	71% - 80% passing
Alarming	Less than or equal to 70% passing

Aggregated results should be broken down into the following categories to identify any potential learner drift or trends in particular employee populations.

Category 1: Compare training results with front-office staff and back-office staff.

It is hypothesized that front-office and back-office staff may have different average results, similar to the pre-test conditions of the knowledge assessment. Because of this, it is recommended to look at the data with these two categories to determine, behaviorally, if this training is equally effective among both general types of positions.

Category 2: Compare different roles and training results.

Like the pre-test conditions of the knowledge evaluation, staff performance may vary significantly across positions and pay grades. Because of this, analyzing performance and comparing across staff positions is recommended to determine to what degree does this training have an impact on staff performance 30 days after training.

Category 3: Compare different tenure levels and training results.

With veteran staff being able to take this training optionally, it may be relevant determine the level of variability between tenure levels across staff who have taken this training. If this training shows positive correlation with staff performance, it may also show that this training can result in acceptable or superior behaviors in new staff that are on par with staff that have more experience.

Category 4: Compare training modalities and training results

While there may not be a noticeable difference in scoring at the Level 1 and Level 2 areas of evaluation between staff who took this training in-person versus staff who took this training virtually, there may be gaps in knowledge-to-behavioral transfers that may occur based on modality of teaching.

Written communication was selected as the best approach to measuring behaviors because staff can email customers without an observer (especially an observer evaluating their performance) putting a potential bias into their behaviors at the time of observation. Email is considered a behavioral permanent product, meaning, that the behavior creates an artifact for someone to evaluate the behavior without needing to observe it occurring in real time. This is more feasible when evaluating this program across multiple classes while still targeting a key learning objective.

If the Level Four evaluation (results) appears to fall below the acceptable range of evaluation, conducting observations of a small sample size of front office staff's verbal communication during customer interactions may be necessary to identify or rule out if results are not being met due to gaps in performance that was not otherwise captured in this evaluation.

PROPOSED INSTRUMENT

Rubric for Generalization of Knowledge via emails in job role			
<i>Instructions: Attach Email to rubric</i>			
Section 1: Build rapport			
Section Steps	<i>Write learner response or 1–5-word description</i>	<i>Circle, Checkmark or Highlight Yes or No</i>	
	Greeting used	Meets Criteria	
1. Begins e-mail with professional greeting. Examples: "Hello", "Hello [first name]", "Good morning", "Good afternoon" Non-examples: "Hey", "[First name] – ", "Hi"		Yes	No
	Variable Identified:	Meets Criteria	
2. Identifies variables influencing request.		Yes	No
	Statement used:	Meets Criteria	
3. Uses an appropriate empathy statement that relates to the variable Examples of empathy statement: Variable: New Customer wanting an account Example Statement (Positive): We are excited to help you open this account.		Yes	No

			Total Meeting Criteria
Total" Yes"			3
Criteria to pass must have 2/3 "Yes"	Passed Section?	Passed	Did not Pass
Section 2: Ask clarifying questions and / or reiterate the request back to the customer			
Clarifying Question Definition: any question that the response requests that relates to the subject matter of the email and has not been previously stated.	Clarifying Question:	Meets Criteria	
		Yes	No
Reiterate the Request Back to the Customer Definition: A statement that includes correct request and what steps the writer will complete to address request	Request Identified by Writer:	Request Correctly Identified?	
		Yes	No
	Action Plan identified by writer:	Action plan written.	
		Yes	No
			Total Criteria
Total" Yes"			3
Criteria to pass: must have 2/3 "Yes"	Passed Section?	Passed	Did not Pass
Section 3: Offer additional services or otherwise enhance the request.			

Examples:	Value Added:	Meets Criteria	
	Provides tutorial on how to access request information in the future Provides additional information related to request		Yes
			Total Criteria
Total" Yes"			1
Criteria to pass must have 1/1 "Yes"	Passed Section?	Passed	Did not Pass
Section 4: Show appreciation.			
Examples:	Value Added:	Meets Criteria	
"Thank you", "I look forward to speaking with you again!", "I appreciate...."		Yes	No
			Total Criteria
Total" Yes"			1
Criteria to pass must have 1/1 "Yes"	Passed Section?	Passed	Did not Pass
Total Score in "Yes" Category:			
			8
Total Passed Sections:			
			4
Overall Pass?			
		Yes	No

LEVEL FOUR: RESULTS

Kirkpatrick describes Level 4: Result evaluation as the juxtaposition of training outcomes and the organization's outcomes (Kirkpatrick & Kirkpatrick, 2016). It is recommended that evaluating the results of this training to be conducted so that Albuquerque Banking can ensure that the behaviors they are expecting from their staff are correlated to perception of quality service from their customers and internal stakeholders. If the results of this evaluation meets the standards proposed, it can be determined that this training is effective and should continue to be required for all staff at all levels and positions to take this training. If the results are unmet, it can be determined that customer perception of satisfaction is not being met by the current training, staff performance or service model.

PROPOSED INSTRUMENT:

Albuquerque Banking measures external and internal customer service through feedback surveys of customer satisfaction. The key measurement to be collected for Level 4 Results will be under these specific questions:

On a scale of 1-5, how would you rate your service today? 1 being poor, 5 being excellent.

This survey is completed by approximately 15% of customers and approximately 20% of employees. In order to interpret these survey scores, it is recommended that scores with a 4 or a 5 rating to be the targeted range of ratings with all ratings a 3 or below to be considered outside training goals.

While the actual service data was unable to be gathered during the time frame of this evaluation due to approval processes, the customer satisfaction scores prior to this training implementation is hypothesized to may look similar to this break down of the Likert scale survey question:

External Customers	
5	59%
4	11%
3	12%
2	8%
1	10%

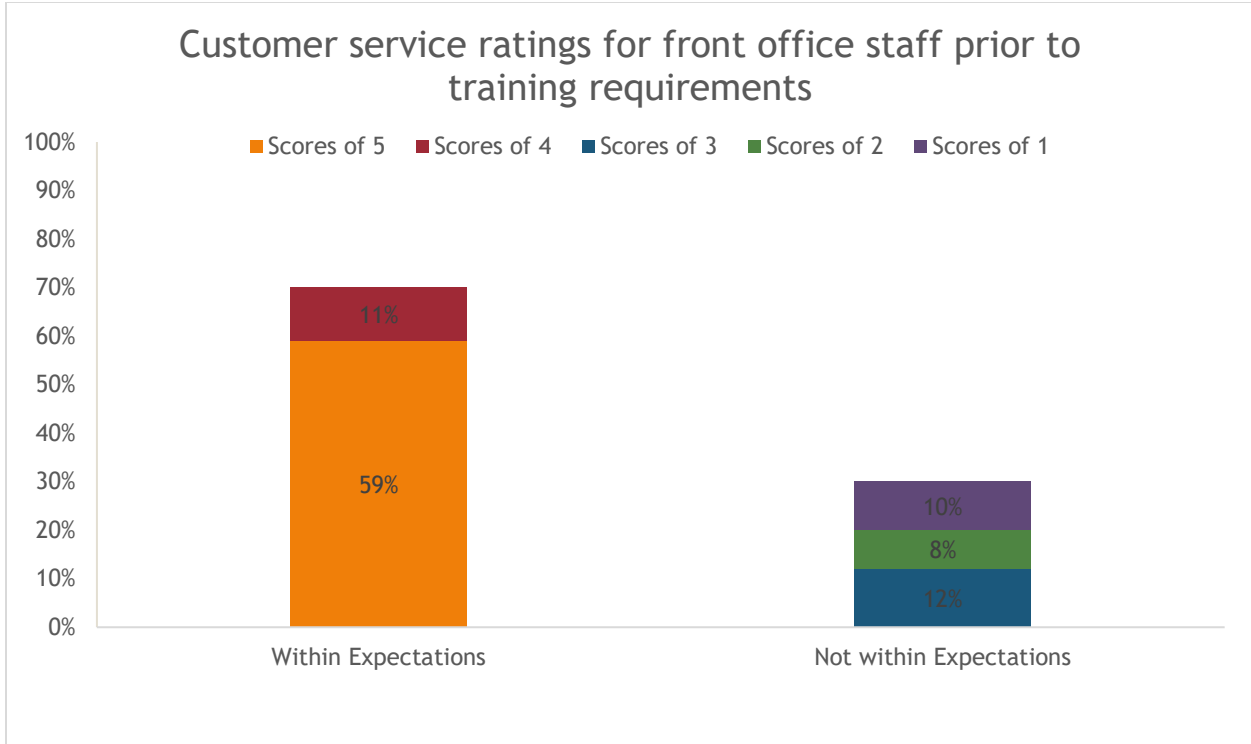


FIGURE 13 GRAPH DEPICTS ABOUT 70% OF RATINGS TO BE WITHIN SERVICE EXPECTATIONS BY FRONT OFFICE STAFF.

Internal Customers	
5	46%
4	25%
3	4%
2	11%
1	14%

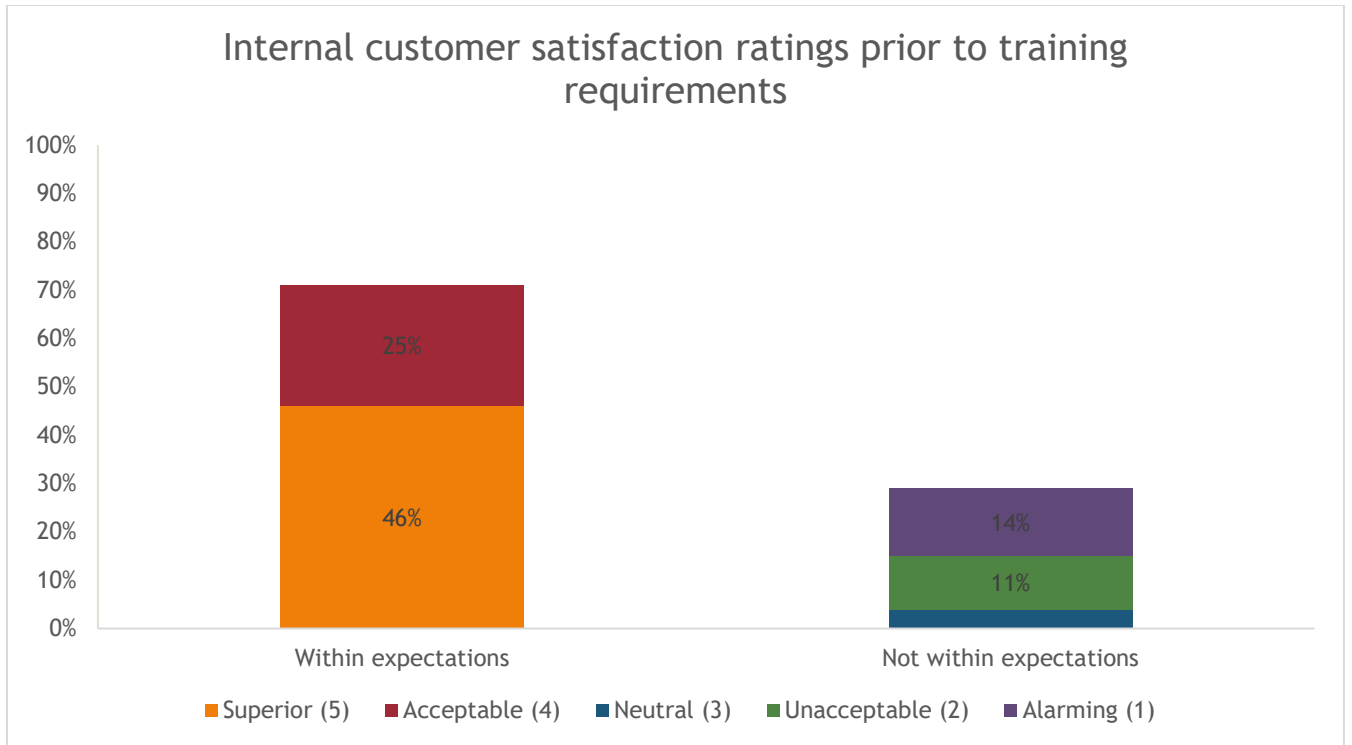


FIGURE 14 GRAPH DEPICTS SERVICE TO BE WITHIN EXPECTATIONS FOR 70% OF BACK-OFFICE CUSTOMERS.

PROPOSED RESULT STANDARDS:

It is proposed that with the increase in training hours, the scores of this survey be assessed every 3 months as training classes continue to train the appropriate service model. The following standards below are to indicate if training was successful to the organization's outcomes across external and internal customer service satisfaction ratings.

Superior	Increase is at or above a 7.5% increase to 4-5 data points. Less than 3% change to 1-3 data points.
Acceptable	Increase is at or between 3-7.4% change to 4-5 data points. Less than 3% change to 1-3 data points.
Unacceptable	Less than 3% change to 4-5 data points, increase is less than 5% across 1-3.
Alarming	Less than 3% change to 4-5 data points, increase is greater than 5% across 1-3.

CONCLUSIONS

SUMMARY OF FINDINGS

Based on Level 2 evaluations conducted for Savvy Service Skills, this training shows acceptable to superior rates of knowledge transfer as it relates to written communication with external and internal customers.

Results from Level 2 evaluations indicate that this training may not be necessary for back-office staff above a certain salary grade due to pre-test outcomes from the staff tested being within the acceptable – superior range across all S9 and above back-office staff.

Level 1 evaluations indicated that on average, learners felt confident in engaging in the skills taught in this training and felt that the content was relevant to their roles. A small subset of learners did identify that while they felt the training was relevant to their role, the specific scenarios practiced during the training did not align with their daily job experiences. Therefore, it may be relevant to revise back-office staff scenario activities to be more specific to job roles rather than generalized. These scenarios could be potentially switched out or curated to the audience per training session.

A large limitation of this evaluation was that Level 3 and Level 4 evaluations could not be administered. Because this training is now being consumed by the majority of employees at Albuquerque Banking, it is essential that staff behaviors and results be evaluated to ensure this training directly impacts the customers this training prepares staff to serve.

RECOMMENDATIONS

Priority One: Ensure behaviors exhibited by staff are within the standards set within Savvy Service Training.

Prior to determining if requiring all incoming staff to take Savvy Service, it is highly recommended that a Level 3 evaluation on staff behavior change after training is implemented. If staff do not engage acceptable email practices within their typical job roles after this training, it is highly unlikely that staff would engage in other customer service skills taught in the training, thus, indicating that this training does not impact nor elevate Albuquerque Banking's service standards across internal and external customers. If this is the case, it is highly recommended that training is paused for incoming staff while the training is revised. Revisions of this training to promote behavioral transfer include:

1. Replacing facilitation of content with hands-on activities that allow staff to roleplay expected behaviors within their job role.
2. Expanding Level 2 Evaluation of Knowledge to include face-to-face customer service interactions.
3. Ensuring all examples and activities within training are alike to real-work situations across roles.

Priority Two: Ensure acceptable to superior behaviors exhibited by staff that went through Savvy Service Skills impacts customer satisfaction scores.

Once behavioral standards are identified as being met via the proposed data collection method discussed in Level 3, it is also recommended that Albuquerque Banking monitor this training's impact on customer reaction to the increase of staff that have undergone this training. Because service skills directly impact the customers that Albuquerque Banking serves, ensuring that training on customer service relations positively impacts customer perception is essential to justify the resource hours required to train staff. If survey results data from internal and external customer do not indicate a change, it cannot be determined that this training results in meaningful behavioral change in staff in terms of improving customer service relations.

If the result of this Level 4 evaluation is shown to be within the unacceptable to alarming range of results, it is highly recommended that additional needs assessments be conducted to determine gaps in staff performance and customer satisfaction and that training ceases to continue to be required for all staff.

If the result of the Level 4 evaluation is shown to be within the acceptable to superior range of results, then, expanding this training to be a requirement for all staff will be a reasonable choice. Additionally, after this training is shown to positively influence customer perception, next steps can potentially include exploring methods of decreasing class time while maintaining the standards of acceptable and superior across all evaluation levels. Some examples of this would be to identify areas of facilitation that could be replaced by activities, edit out content that does not directly align with learning objectives, or reducing class sizes from 30 to 15 to ensure activities do not take longer than intended.

REFERENCES

Kirkpatrick, J. D., & Kirkpatrick, W. K. (2016). *Kirkpatrick's four levels of training evaluation*. ATD Press.

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