

Atomic Music

Performance & Training Needs Analysis

Final Reports



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Atomic Music

August 26, 2022

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Performance Gap Analysis Report—Atomic Music

Performance Gap Analysis

Client: Atomic Music

Background Information: Atomic Music is a retail business that buys, sells, and trades new and used musical instruments and related gear. When Atomic Music purchases items directly from customers for resale or allows customers to trade musical instruments or gear toward other items in the shop, it is required by law that the purchased or traded items be placed on a 30-day hold before being offered for sale in the store or online. (This requirement is a safeguard against the business buying stolen goods from the public.) The items are entered into the inventory system and stored in an area of the shop reserved for this purpose referred to as "the clink." When an item's 30-day hold is complete, it is removed from the clink and processed for resale.

Methods: A client/stakeholder interview was conducted to complete this PGA.

Problem Statement: Employees inconsistently process clink items, resulting in errors in availability, pricing, and stock.

Performance Gap:

Current Performance: 0% of employees correctly process clink items consistently.

Desired Performance: 100% of employees correctly process clink items consistently.

Delta = 100%

ROOT CAUSE ANALYSIS

Problem Statement: Employees inconsistently process clink items, resulting in errors in availability, pricing, and stock.

Root Cause: Employee training on how to process click items is informal and is done “on-the-fly” during busy work hours and is facilitated by a variety of employees who communicate the process slightly differently.

Methods of Data Collection: A team member survey and a “five-why” stakeholder interview were conducted to complete this RCA.

TEAM MEMBER SURVEY

A survey was conducted with six team members who are responsible for processing click items. The members surveyed consisted of one owner, three shop managers, and two sales associates. The survey included the following questions:

- 1) What resources do you use when determining how to price an inventory item?
- 2) What steps do you follow when determining the price of an inventory item?
- 3) How has the process of appropriately pricing inventory items been communicated?
- 4) How do you know when you have priced an inventory item correctly/incorrectly?
- 5) What happens if anything when you price an inventory item incorrectly?
- 6) What shop-related factors, if any, influence your ability to price inventory items with confidence?
- 7) What other factors, if any, influence your ability to price inventory items with confidence?
- 8) How has the process of adding click items into inventory and onto the web sales platforms been communicated?
- 9) What resources are necessary to add click items into inventory and onto the web sales platforms?
- 10) Do you feel confident in using the necessary resources to add items into inventory and onto the web sales platforms? Why or why not?
- 11) What shop-related factors if any, influence your ability to add items into inventory and onto the web sales platforms?

- 12) What other factors if any, influence your ability to add items into inventory and onto the web sales platforms?
- 13) When is it appropriate, if ever, to add a clink item to the Atomic Music website?
- 14) When is it appropriate, if ever, to add a clink item to eBay and/or Reverb?
- 15) When is it appropriate, if ever, to place clink items onto the sales floor?
- 16) In what direct and/or indirect ways do errors in availability, pricing and stock affect your job performance and/or job experience?

CATEGORIZED FACTORS INFLUENCING PERFORMANCE BASED ON TEAM SURVEY

| CATEGORY | INFLUENCING FACTORS |
|---|--|
| <p>Information & Feedback</p> | <p>New employees are “trained” to process clink items by a variety of employees who utilize different versions of the process.</p> <p>All employees surveyed indicated the same resources are utilized for pricing typical items: by researching similar items previously sold on Reverb, eBay, and in the POS system, internet searches, and how much the shop paid at purchase from customer, however, there is currently not a consistently effective process for pricing vintage or rare items.</p> <p>Managers’ and owners’ only means of feedback is spotty, verbal, and sometimes involves yelling.</p> <p>Pricing issues are discovered after the fact and by trial and error instead of prices being properly vetted.</p> |
| <p>Environment & Resources</p> | <p>The ability to price items correctly depends on the working internet, history of sales prices of similar items, and owner/manager input. Comparable sales are difficult to find for rare and vintage items making pricing those items a challenge.</p> <p>Stress, pressure, and the reaction of owners (positive and negative), and fluidity in the gear market affect employees’ performance.</p> <p>The shop is often too busy to pull items; being understaffed and fully engaged with a large volume of customers, both in-person and on the phone, as well as</p> |

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|--------------------------------------|---|
| | <p>the resulting reduction in computer availability, all inhibit the ability to properly pull, price, and enter items.</p> <p>Lack of organization by date in the clink inhibits timely item processing.</p> |
| Consequences & Incentives | <p>No consistent methods are in place to reward or incentivize employees. Annual holiday bonuses are determined arbitrarily.</p> |
| Knowledge & Skills | <p>All employees surveyed indicated the knowledge that clink items must complete their mandatory 30-day hold, however, the items are processed a bit differently by each employee and there is general misunderstanding/disagreement over how to prioritize the tasks involved.</p> |
| Capacity | <p>It was expressed that it is very helpful when items are pre-tagged before being placed in the clink area for the 30-day waiting period, though market fluctuation during that time can be challenging.</p> <p>Confidence in the area of using necessary resources for adding items to inventory and web sales platforms was expressed by all surveyed.</p> <p>Properly tagged items, i.e., assigned an inventory number and entered into the system, can be tracked easily and added to “active” inventory when ready to be pulled from the clink.</p> |
| Motivation & Expectations | <p>Employees expressed the following regarding errors in pricing, availability & stock:</p> <ul style="list-style-type: none"> - Disappointment in not meeting customer expectations in regard to errors. - Frustration that productivity is bottlenecked when owners or managers are not available to give the last say on pricing. - A lack of training and trust on the part of the owners causes situations that detract from helping customers and that is an additional emotionally stressful burden for an already challenging job. |

STAKEHOLDER INTERVIEW - FIVE-WHY TECHNIQUE

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| PROBLEM STATEMENT: Employees inconsistently process clink items, resulting in errors in availability, pricing, and stock. |
| Why? There is no clear procedure in place that, if followed, would ensure no steps are missed. |
| Why? The procedures in the store have developed organically over time. |
| Why? Individual employees tend to use different steps to accomplish the tasks they think are important and based on what they think is priority order. |
| Why? Multiple staff members train new employees and do so on-the-fly during business hours, giving slightly different versions of processing clink items. |
| Why? There is no set, consistent method of training employees in the processing of clink items. |

FINDINGS & RECOMMENDATIONS

| FINDING(S) | RECOMMENDATION(S) |
|--|---|
| No consistently effective process exists for pricing vintage or rare items. | Implement a vetting process to ensure vintage and rare items are priced accurately. |
| Employees do not receive regular, constructive feedback on their performance from supervisors. | Implement a performance review process to provide employees with regular, constructive feedback from supervisors. |
| No consistent methods exist to reward or incentivize employees. | <p>Incentivize employees by incorporating raises into the performance review process and by basing year-end bonuses on a percentage of annual sales, or employee position and length of employment.</p> <p>Reward employees... some ideas:</p> <ul style="list-style-type: none"> - Host an annual company dinner out - Arrange company off-site activities, such as a ropes course or bowling night - Give paid time off for employee birthdays |

| | |
|--|---|
| | <p>Other: Create a “Wall of Fame” with pictures of each employee, including name, length of employment, position, and caption.</p> |
| <p>Extensive customer care & service responsibilities, both in-person and over the phone, inhibit employees’ ability to pull, price, and post items released from the clink during shop hours.</p> | <p>Augment the existing employee work schedule such that it allows clink items to be pulled, priced, posted, and placed on the sales floor outside of regular shop hours.</p> |
| <p>There is general inconsistency in the “life cycle” of clink items, including:</p> <ul style="list-style-type: none"> - the initial assigning of inventory numbers, and tagging and entering them into inactive inventory - organizing them by date in the clink. <p>And, once pulled:</p> <ul style="list-style-type: none"> - adding them to the active inventory - correctly pricing items* - correctly prioritizing their postings on web sales platforms* - placing them onto the sales floor only after all other necessary steps are completed. | <p>*Provide the appropriate employees with formal training on processing clink items before expecting or requiring them to perform the tasks involved.</p> <p>*Update: Stakeholders determined during a post-analysis review and confirmation that the scope of this project should be limited to training employees how to correctly process clink items, including proper utilization of the inventory software, Pawnmaster. Therefore, pricing and entering items onto web sales platforms will not be addressed in the design and development of this training.</p> |

Training Needs Analysis—Atomic Music

Purpose of TNA: The purpose of this Training Needs Analysis is to determine the specific skills, knowledge, and processes necessary to close the performance gap with regard to processing click items and to inform the design and development of a training program to improve performance in this area.

Client: Atomic Music

Background Information: Atomic Music is a retail business that buys, sells, and trades new and used musical instruments and related gear. When Atomic Music purchases items directly from customers for resale or allows customers to trade musical instruments or gear toward other items in the shop, it is required by law that the purchased or traded items be placed on a 30-day hold before being offered for sale in the store or online. (This requirement is a safeguard against the business buying stolen goods from the public.) The items are entered into the inventory system and stored in an area of the shop reserved for this purpose referred to as "the click." When an item's 30-day hold is complete, it is removed from the click and processed for resale.

Problem Statement: Employees inconsistently process click items, resulting in errors in availability, pricing, and stock.

Performance Gap:

Current Performance: 0% of employees correctly process click items consistently.

Desired Performance: 100% of employees correctly process click items consistently.

Delta = 100%

Root Cause: Employee training on how to process click items is informal and is done "on-the-fly" during busy work hours and is facilitated by a variety of employees who communicate the process slightly differently.

Focus of TNA Based on Performance Gap Analysis Findings & Recommendations

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|---|---|
| <p>Findings:</p> <p>There is general inconsistency in the processing of clink items throughout their life cycle, including:</p> <ul style="list-style-type: none"> - entering data into the inventory software correctly and tagging items - organizing items by date purchased in the clink - adding pulled items into active inventory in the inventory software - placing items onto the sales floor where and when appropriate | <p>Recommendation:</p> <p>Provide employees with formal training on how to correctly process clink items prior to expecting or requiring them to perform the tasks involved.*</p> <p>*Update: As indicated in the FEA, stakeholders determined during a post-analysis review and confirmation that the scope of this project should be limited to training employees to process clink items. Therefore, pricing and entering items onto web sales platforms will not be addressed in the design and development of this training.</p> |
|---|---|

Training Needs Analysis Research Agenda

| PURPOSE | INPUT (DATA) | SOURCE | METHOD |
|--|--|--|----------------------|
| <p>This questionnaire is being conducted to:</p> <ul style="list-style-type: none"> - Collect information on the specific steps employees typically take when processing clink items, from the time of purchase, through the required hold period, and after the hold period ends. - Determine specific employee knowledge gaps in procedure for clink items. - Illicit employee feedback on process improvement with regard to the “life cycle” of clink items. - Collect additional feedback to inform training objectives and evaluation. | <p>What steps, in priority order, do employees take when processing a clink item during its “life cycle,” i.e., before, during, and after the required 30-day hold period?</p> <p>What improvements could be made to the processing of these items?</p> <p>What kind of training and/or training aids would be most helpful/useful, e.g., Online, in-person, PowerPoint, video, job aid?</p> | <p>Employees who are responsible for processing clink items.</p> | <p>Questionnaire</p> |
| <p>Collect employee opinions on</p> | <p>To determine:</p> | <p>Employees</p> | <p>Likert scale</p> |

| | | | |
|--|--|--|------------------|
| <p>a variety of points with regard to processing clink items.</p> | <p>Is it too busy in the shop to process clink items ready for release? How stressful/not stressful is it to process clink items during regular shop hours? How comfortable are employees with the processing of clink items from beginning to end? How do employees feel about the option of processing clink items before or after regular shop hours? How valuable would employees consider training in processing clink items? How open/willing are employees to train? Would consistent processing of clink items by all employees make a positive change? Is training in this area a waste of time?</p> | <p>who are responsible for processing clink items.</p> | <p>survey</p> |
| <p>Determine the goals and objectives of the training from a stakeholder/owner perspective. Collect stakeholder feedback to inform training objectives and evaluation.</p> | <p>In a perfect world, what are the specific and prioritized steps that employees should know and take for processing clink items, from the time an item is purchased by Atomic until it is ultimately made available for resale? What could employees do differently to make processing clink items go smoothly? What could be done differently, from a leadership perspective, for example staffing, to make processing clink items go smoothly? How can the stakeholders/owners support employees in reaching training goals?</p> | <p>Stakeholders /owners</p> | <p>Interview</p> |

Training Needs Analysis Data Collection Instruments

Employee Questionnaire:

**ATOMIC MUSIC
Processing Clink Gear - Purchase through Resale
Employee Questionnaire**

The purpose of this questionnaire is to gather your feedback on the processing of clink items.
Thank you for taking the time to complete this!

- 1) Atomic purchases or accepts an item in trade for the purposes of resale and it will be held in the clink for 30 days. To the best of your knowledge, please list the steps/tasks, in priority order, that will be taken to process the item during its "life cycle" - from the time of purchase, through the hold period, to preparations for resale after the hold period ends. Please be specific. For example, if one step/task is to tag the item, please indicate what information would be included on the tag. (Please use the back of this if more space is needed.)

- 2) In your opinion, what improvements could be made to the processing of clink items?

- 3) In your opinion, what kind of training and/or training aids would be most useful in helping everyone at Atomic follow a consistent procedure for processing clink items?
Circle all that apply:

Online training In-person training Video Posted Job Aid Pocket Checklist

Other (please specify): _____

Employee Survey:

ATOMIC MUSIC
Processing Clink Gear - Purchase through Resale
Employee Survey

The purpose of this survey is to gain a better understanding of your position on points related to processing clink items throughout their life cycle, meaning from the time of purchase, through the required hold period, to preparations for resale after the hold period ends.

Please circle the answer that best fits your position.

Thank you for participating!

- 1) I have a clear understanding of the steps/tasks required to process an item before it is placed in the clink.

Strongly agree Agree Neutral Disagree Strongly disagree

- 2) I know where to place items in the clink to wait out their 30-day hold period.

Strongly agree Agree Neutral Disagree Strongly disagree

- 3) Items in the clink that are ready for release can be found easily.

Strongly agree Agree Neutral Disagree Strongly disagree

- 4) I have a clear understanding of the steps/tasks required to prepare an item for resale once it is released from the clink.

Strongly agree Agree Neutral Disagree Strongly disagree

- 5) Clink items are processed consistently by all employees across their life cycle.

Strongly agree Agree Neutral Disagree Strongly disagree

- 6) I would benefit from training in the area of processing clink items through their life cycle.

Strongly agree Agree Neutral Disagree Strongly disagree

- 7) New and new-ish employees would benefit from training in the processing of clink items.

Strongly agree Agree Neutral Disagree Strongly disagree

- 8) At times I feel torn between providing customer service and pulling/processing clink items.

Strongly agree Agree Neutral Disagree Strongly disagree

- 9) I would benefit from having time dedicated specifically to pulling and processing clink items during regular shop hours.

Strongly agree Agree Neutral Disagree Strongly disagree

- 10) I would benefit from having time dedicated specifically to pulling and processing clink items before or after regular shop hours.

Strongly agree Agree Neutral Disagree Strongly disagree

- 11) I have noticed that interruptions in processing items after being pulled have caused errors in pricing, availability, and/or stock.

Strongly agree Agree Neutral Disagree Strongly disagree

- 12) I know what to do with an item if processing is interrupted before completion after being pulled from the clink.

Strongly agree Agree Neutral Disagree Strongly disagree

Stakeholder Interview:

ATOMIC MUSIC
Processing Clink Gear - Purchase through Resale
Stakeholder Interview

The purpose of this interview is to determine, as stakeholders and owners, what you would consider ideal employee performance in the processing of clink items. This information will assist in creating training objectives and evaluation instruments.

Thank you for your feedback and participation.

First, some questions about the web sales platforms and system of inventory used:

- 1) Items are currently being listed for sale on eBay and Reverb, is that correct? But not on the main website. How do you envision a change in this process, if any, and, if so, when?
- 2) How many employees are currently responsible for posting items to eBay and Reverb? Do you plan on inviting other employees to take on this responsibility as part of this training process?
- 3) The main inventory system for Atomic is the Pawnmaster software, is that correct? Both as Inactive and Active Inventory? Do you envision that changing at any point?
- 4) Who is responsible on a daily basis to pull and price clink items?

The following questions are about employee performance tasks:

- 5) In your opinion, what improvements could be made to the processing of these items?
- 6) What could employees do differently to make processing clink items go smoothly?
- 7) What could be done differently, from a leadership perspective, for example, staffing, to make processing clink items go smoothly?
- 8) In a perfect world, what are the specific and prioritized steps or tasks that employees should know and perform to properly process clink items throughout their life cycle—from the time of purchase, through the hold period, to preparations for resale after the hold period ends.

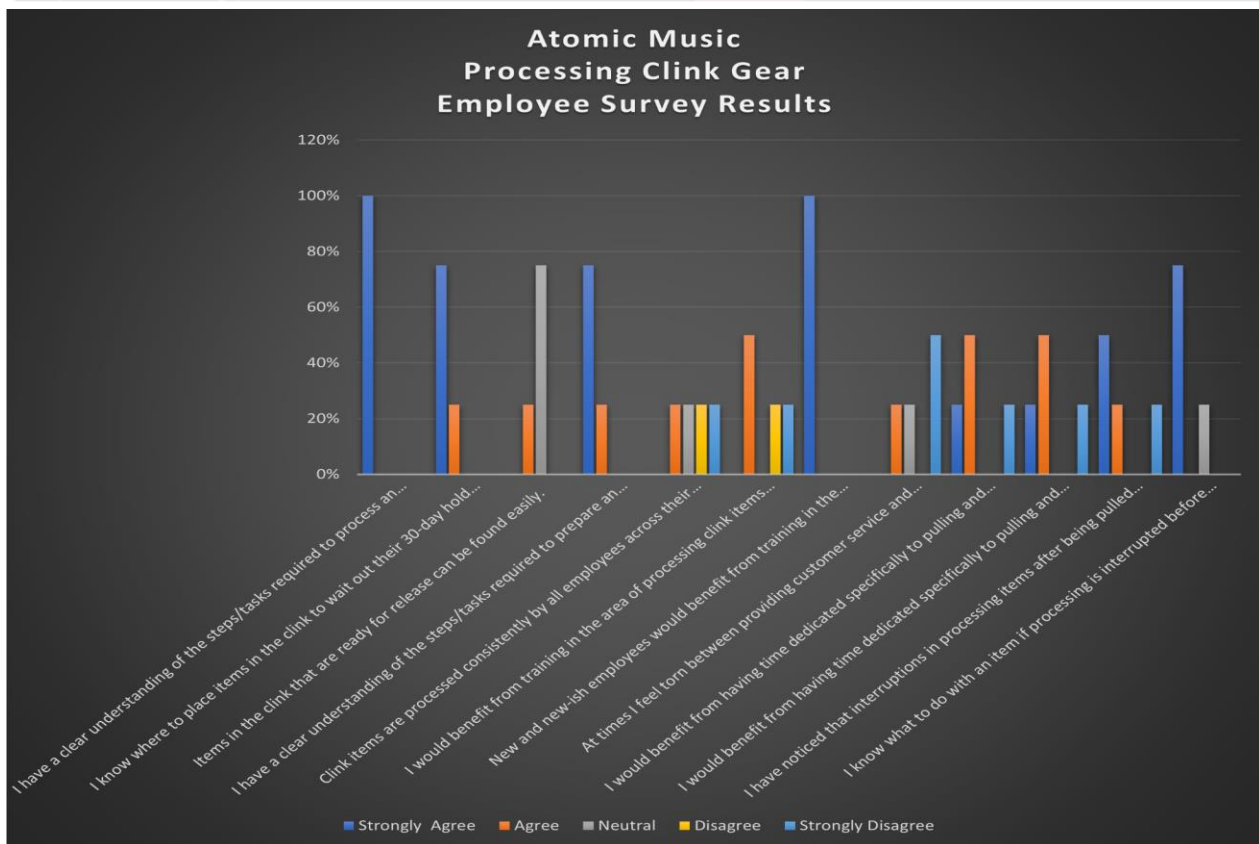
Training Needs Analysis Data Collection Summaries

Employee Questionnaire Data Summary:

- Though employees indicated some general knowledge of the appropriate steps to take before and after items are held in the clink, their answers lacked specific and important detail. For example, only one employee mentioned the inventory software used to process inventory, Pawnmaster, and even then was not specific about what information was necessary to enter therein. Only one employee indicated the research that should be done in order to price an item appropriately or specificities regarding the selling price. No one else indicated anything about determining the selling price. Only one employee listed the task of pulling the item into inventory or “locating it in Pawnmaster” after its 30-day hold had ended.
- Employee feedback/suggestions for improvement:
 - Better organization
 - Pre-price [item] during the buying phase (instead of post-hold)
 - Managers should approve all prices
 - More clink space to aid in organizing by date purchased
 - Make sure to do the research in order to tag the items for sale at an appropriate and competitive price relative to the current used market price
- Training and/or training aids employees indicated would be most helpful (by percentage):
 - Online training - 0%
 - In-person training - 100%
 - Video - 25%
 - Posted Job Aid - 50%
 - Pocket Checklist - 0%

Training Needs Analysis Employee Survey Data Charts:

| ATOMIC MUSIC Processing Clink Gear - Purchase through Resale Employee Survey | Strongly Agree | Agree | Neutral | Disagree | Strongly Disagree |
|---|----------------|-------|---------|----------|-------------------|
| I have a clear understanding of the steps/tasks required to process an item before it is placed in the clink. | 100% | | | | |
| I know where to place items in the clink to wait out their 30-day hold period. | 75% | 25% | | | |
| Items in the clink that are ready for release can be found easily. | | 25% | 75% | | |
| I have a clear understanding of the steps/tasks required to prepare an item for resale once it is released from the clink. | 75% | 25% | | | |
| Clink items are processed consistently by all employees across their life cycle. | | 25% | 25% | 25% | 25% |
| I would benefit from training in the area of processing clink items through their life cycle. | | 50% | | 25% | 25% |
| New and new-ish employees would benefit from training in the processing of clink items. | 100% | | | | |
| At times I feel torn between providing customer service and pulling/processing clink items. | | 25% | 25% | | 50% |
| I would benefit from having time dedicated specifically to pulling and processing clink items during regular shop hours. | 25% | 50% | | | 25% |
| I would benefit from having time dedicated specifically to pulling and processing clink items before or after regular shop hours. | 25% | 50% | | | 25% |
| I have noticed that interruptions in processing items after being pulled have caused errors in pricing, availability, and/or stock. | 50% | 25% | | | 25% |
| I know what to do with an item if processing is interrupted before completion after being pulled from the clink. | 75% | | 25% | | |



Stakeholder Interview Data Summary:

- 1) Items are currently being listed on eBay and Reverb, and not on the main website because the website's software is outdated. There is a strong desire to have the ability to list all gear for sale on the Atomic Music website because of the fees involved in selling gear on external platforms, however, due to software and employee availability issues, this goal is not achievable at this time.
- 2) Two employees are currently responsible for posting items to eBay and Reverb. Stakeholders are pleased with their performance in this area, and they have no plans at this time to train other employees to perform this task.
- 3) Store inventory (both inactive and active) is managed with a software called Pawnmaster. The software is set up such that items listed on eBay are automatically marked as sold (removed from inventory) when the item is sold from the shop floor. At this time, the software is not set up to do the same for Reverb, so those items must be marked as sold or removed as a listing on Reverb manually. The two employees responsible for posting items to eBay and Reverb are also responsible for ensuring the above task is completed.
- 4) No specific employee checks daily for items ready for release from the clink. Whoever is available when it is slow enough in the shop will pull and process items. The goal is that this task is assigned to an employee who is not responsible for assisting customers (at least for the time it takes to complete it), so that they may focus on it without interruption.
- 5) The process works great if employees know it and follow it.
- 6) When employees perform appropriate tasks and do so consistently when processing clink items, the process goes smoothly.
- 7) Some things that could be done differently from a leadership perspective: Provide staff consistent training on processing clink items, provide paid time outside of regular shop

hours to pull and process clink items, expand and straighten the clink area to allow for better organization of clink items, conduct research on the pricing of items requiring extra scrutiny during the 30-day hold time, so that a price has been determined by the time an item is ready to be pulled. These interventions are all feasible.

8) Steps/Tasks for processing clink items throughout their life cycle are as follows:

Steps/Tasks at purchase and intake:

1. Access the Pawnmaster inventory system with the employee login credentials
2. Locate the existing customer account (search by last name or phone number) or create a new customer account
3. Once an account has been found or created, initiate a new buy and enter items for purchase
4. The following information will be required for each item:
 - 4.1. Inventory number—the system will assign an inventory number automatically
 - 4.2. Item details—Make/model and item type, serial # (if unavailable, provide a detailed description)
 - 4.3. Cost—amount paid to customer by Atomic (determined senior staff)
 - 4.4. Enter resale price as “\$0” (unless pre-determined by senior staff)
 - 4.5. Brief description of included accessories AND repairs needed if any
5. Repeat Step 4 for all items being purchased from the customer
6. Once all items have been entered, “Save” the buy
7. When prompted, print labels for each individual item—all cases, power supplies, and other accessories should have their own label
8. A “Buy Form” will be generated and printed automatically—ask the customer and a manager or owner sign the Buy Form

9. Place the signed Buy Form in the Buy Form storage box under the counter at the main computer terminal
10. Place labels directly on items and accessories OR place labels on tags and hang tags on items and accessories
11. Place items with their accessories in the clink storage area—items should be arranged by the date purchased

Steps/Tasks for resale, AFTER an item's 30-day hold period is completed:

1. Access Pawnmaster with employee login credentials
2. Search for a list of items ready for resale
3. Confirm that each item on the list is ready for resale by checking the date on its label/tag—30+ days from the purchase date (if an item is missing its label/tag, find the item in Pawnmaster by searching for its serial number, brand, or model)
4. Remove items from the clink and bring them to the sales floor area designated for items being priced
5. Ask a senior staff member to determine a price for each item (or to confirm the price if predetermined)—make a note of the price of each item
6. Locate the item in Pawnmaster using the inventory number on the label/tag generated from the buy
7. Once you have located the item in Pawnmaster, “Pull” the item into “Active Inventory”
8. Add a note in the description as to the storage location of the accessories (where you will be placing them until the items sell)
9. Enter the price determined above and click Save
10. Print new labels for the item and for all cases, power supplies, and accessories

11. Replace the original labels/tags on each item, including all cases, power supplies, and accessories
12. If an item requires repairs (this should already be notated in the description, if applicable), take it to the repair shop, otherwise...
13. Place the item on the sales floor in the appropriate section (items are grouped with like items)
14. Place any related cases, power supplies, and other accessories in the appropriate warehouse area (the one indicated in the description on the new label)

TNA FINDINGS & RECOMMENDATIONS

| FINDING(S) | RECOMMENDATION(S) |
|---|--|
| <p>Most (75%) employees surveyed agree or strongly agree that interruptions in processing clink items (after they have been pulled) have caused errors in pricing, availability, and/or stock.</p> <p>Most (75%) agree or strongly agree that they would benefit from having time specifically dedicated to pulling and processing clink items either before or after regular shop hours.</p> | <p>Consider adjusting staff hours to allow scheduling qualified employees to pull and process clink items before or after regular business hours or on certain days only.</p> <p>New and other employees wishing to increase their weekly work hours will be incentivized to take the training to qualify them to process clink items.</p> |
| <p>When prompted with a statement that items in the clink could be found easily, a majority of employees surveyed are neutral, yet half of them indicate that more space and better organization in the clink area would improve the processing of clink items overall.</p> | <p>Consider reorganizing the clink area to allow for more space to arrange items on hold neatly and by the date purchased.</p> |

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| <p>Pawnmaster is set up such that items listed on eBay are automatically marked as “sold” when an item on the shop floor is sold. It does not do so for Reverb, so those items must be marked as sold or removed as a listing on Reverb manually. This causes errors and confusion.</p> | <p>Instruct the two employees responsible for posting items on Reverb to review daily shop sales and mark items as sold on Reverb, as necessary.</p> |
| <p>Previous stakeholder data findings reveal that the pricing of items, including vintage and rare items, is inconsistent and often incorrect.</p> | <p>Previous Recommendation: Implement a vetting process to ensure all items, including vintage and rare items, are priced accurately.</p> <p>Current/Future Recommendation: Only owners and/or managers are responsible for pricing items.</p> <p>Additional Stakeholder Recommendation: Managers/owners should research the pricing of items that require extra scrutiny (vintage and rare items) during the 30-day hold time so that a price has been determined by the time an item is ready to be pulled from the clink.</p> |
| <p>Review and comparison of employee questionnaire data and stakeholder interview data reveal discrepancies in steps/tasks necessary in processing clink items. There is inconsistency and a general lack of specificity in responses regarding processes, particularly concerning the inventory software, Pawnmaster, and pricing procedures.</p> <p>All employees surveyed(100%) indicate that in-person training would be most helpful. Half of them indicate that a job aid would be helpful in addition to in-person training, and 25% indicate video demonstrations would be helpful.</p> <p>All employees surveyed (100%) strongly agree that new and other employees would benefit from training on how to process clink items.</p> | <p>Create and implement a computer-based, instructor-led hybrid training to address the processing of clink items including proper utilization of the inventory software, Pawnmaster, based on data collected (see Stakeholder Interview Data #8). Incorporate simulations, video demonstrations, job aids, a facilitator guide, and evaluation instruments into the training course to support knowledge transfer and trainee follow-through, and to measure long-term effectiveness of the training effort.</p> |

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| <p>Most employees indicate that they have a clear understanding of how to process clink items and only half thought training would be helpful for themselves, yet a majority disagree or are neutral with regard to clink items being processed consistently by all employees.</p> | <p>All employees should review the job aids.</p> |
| <p>Stakeholder data findings reveal that multiple staff members train new employees and do so on-the-fly during business hours, giving slightly different versions of the order and procedure of de-clinking items and pricing vintage/rare items.</p> | <p>Employees responsible for facilitating training should be expected to review the training materials, i.e., job aids, training video tutorial and demonstrations, and facilitator handout prior to implementation.</p> <p>Allow facilitators and trainees to conduct training outside of regular shop hours.</p> |

Atomic Music

How to Process Clink Gear Training

Design Plan



Submitted by:

Michelle Schwelling

Submitted to:

Eric Schwelling & Luis Peraza, Owners
Atomic Music

September 27, 2022

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Design Plan

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Design Plan

Rationale

Atomic Music is a retail business that buys, sells, and trades new and used musical instruments and related gear. When Atomic purchases items directly from customers for resale or allows customers to trade musical instruments or gear toward other items in the shop, it is required by law that the purchased or traded items be placed on a 30-day hold before being offered for sale. These items are stored in an area of the shop reserved for this purpose referred to as "the clink." When an item's 30-day hold is complete, it is removed from the clink and made available for resale. The processing of these items through their entire "life cycle," meaning from the time of purchase, through the hold period, to preparations for resale after the hold period ends is inconsistently followed by employees, resulting in errors in availability, pricing, and stock. Affected procedures include originating items in the inventory software system as inactive inventory, tagging items with appropriate data, organizing items by purchase date in the clink, adding pulled items into active inventory and retagging them, and correctly prioritizing the process before placing items onto the sales floor. Findings reveal that one of the performance gap's root causes is that multiple staff members verbally "train" new employees in the clink item process and do so on the fly during business hours, giving slightly different versions of the order and procedures.

Stakeholders have indicated that the clink item process would go smoothly if employees knew the appropriate tasks involved and followed them appropriately and consistently. To that end, they have agreed with the recommended intervention detailed in the Training Needs Analysis to provide staff with formal training on how to process clink items to improve performance in this area. Analysis findings suggest that the ideal implementation of the training would be conducted in person, utilizing job aids, a training video with demonstrations, and facilitator instructions. Going forward, employees tasked with facilitating employee training in

clink item processing will be expected to review all training materials before implementation, thus allowing them to ask questions and/or address concerns before implementation. This, together with the training itself, should go a long way to ensuring consistency among the staff and, therefore, closing the performance gap. Finally, training will be conducted outside of regular shop hours to allow for a focused and uninterrupted training experience.

Target Population

The target population for *How to Process Clink Gear Training* will have a variety of educational, professional, and cultural backgrounds, and will consist of any newly hired employee whose responsibilities include processing clink gear. The training will be a required part of the onboarding process. The training will also be implemented as a professional development opportunity for existing employees and will serve as the framework by which all clink gear is processed going forward.

Course Description

How to Process Clink Gear Training will be an in-person training course of approximately 90 minutes in length and will include a training video with demonstrations, job aids, and facilitator instruction and feedback. The setting for the training will be the Atomic Music showroom/shop and it will be conducted one-on-one, with one facilitator and one trainee, to ensure proper knowledge transfer and to aid in observation and evaluation. Hourly employees will be paid 1 1/2 hours at their normal pay rate for training or facilitating. Salaried facilitators will perform training as a management duty. The facilitator and training participant will coordinate with owners/managers to arrange a day and time to conduct the training, which will take place either before or after regular business hours. The goal is for training participants to learn and be confident in performing all appropriate steps/tasks in processing clink items during purchase through resale at Atomic Music before being expected to do so during work. Level I and Level II evaluations, measuring trainee reaction and knowledge transfer, respectively, will take place on the day of training. A Level III evaluation, measuring application, is expected to take place

between 14-30 days after training. A Level IV evaluation, measuring organizational results, is expected to take place 90 days after training.

Atomic Music will provide all the necessary materials to fulfill training needs (except for the facilitator's phone to be used as a stopwatch during evaluation). Materials will include a working computer, internet access, inventory software, a training video with demonstrations, a facilitator guide, job aids (for use during training and future reference), pens, and evaluation materials.

Objectives

Terminal Objective (1 of 2):

Given a video tutorial with demonstrations, facilitator instruction, and job aids, the *How to Process Clink Gear Training* participant should be able to identify and demonstrate the purchase and intake procedures involved in processing an item purchased by Atomic from the public in one attempt without error within 15 minutes.

Enabling Objectives:

- 1) Given a video tutorial with demonstrations, facilitator instruction, and job aids, the *How to Process Clink Gear Training* participant should be able to access the Pawnmaster inventory software using the employee login credentials in one attempt without error
- 2) Given a video tutorial with demonstrations, facilitator instruction, and job aids, the *How to Process Clink Gear Training* participant should be able to locate an existing customer account or create a new customer account in one attempt without error
- 3) Given a video tutorial with demonstrations, facilitator instruction, and job aids, the *How to Process Clink Gear Training* participant should be able to initiate a new buy in one attempt without error

- 4) Given a video tutorial with demonstrations, facilitator instruction, and job aids, the *How to Process Clink Gear Training* participant should be able to initiate a New Buy in Pawnmaster in one attempt without error, including:
 - a. Item details – make, model, and serial number
 - b. All included accessories
 - c. Repairs needed if any
 - d. Amount paid to customer by Atomic
 - e. Resale price as “\$0” (unless predetermined by owner/manager)
 - f. Save the Buy
- 5) Given a video tutorial with demonstrations, facilitator instruction, and job aids, the *How to Process Clink Gear Training* participant should be able to follow the prompts to print labels for each item and its accessories in one attempt without error
- 6) Given a video tutorial with demonstrations, facilitator instruction, and job aids, the *How to Process Clink Gear Training* participant should be able to Save the Buy in one attempt without error
- 7) Given a video tutorial with demonstrations, facilitator instruction, and job aids, the *How to Process Clink Gear Training* participant should be able to obtain the appropriate Buy Form signatures in one attempt without error
- 8) Given a video tutorial with demonstrations, facilitator instruction, and job aids, the *Processing Clink Gear Training* participant should be able to place the signed Buy Form in the Buy Form storage box in one attempt without error.
- 9) Given a video tutorial with demonstrations, facilitator instruction, and job aids, the *How to Process Clink Gear Training* participant should be able to place labels on the item and its accessories appropriately in one attempt without error

- 10) Given a video tutorial with demonstrations, facilitator instruction, and job aids, the *How to Process Clink Gear Training* participant should be able to place items in the appropriate clink storage area in one attempt without error.

Terminal Objective (2 of 2):

Given a video tutorial with demonstrations, facilitator instruction, and job aids, the *How to Process Clink Gear Training* participant should be able to identify and demonstrate the procedures involved in processing an item for resale after it is released from the clink in one attempt without error within 15 minutes.

Enabling Objectives:

- 1) Given a video tutorial with demonstrations, facilitator instruction, and job aids, the *How to Process Clink Gear Training* participant should be able to access the Pawnmaster inventory software using the employee login credentials in one attempt without error
- 2) Given a video tutorial with demonstrations, facilitator instruction, and job aids, the *How to Process Clink Gear Training* participant should be able to search in Pawnmaster for a list of clink items ready for resale
- 3) Given a video tutorial with demonstrations, facilitator instruction, and job aids, the *How to Process Clink Gear Training* participant should be able to confirm that an item is ready for resale in one attempt without error
- 4) Given a video tutorial with demonstrations, facilitator instruction, and job aids, the *How to Process Clink Gear Training* participant should be able to assess an appropriate listing price for the item by asking a senior staff member in one attempt without error

- 5) Given a video tutorial with demonstrations, facilitator instruction, and job aids, the *How to Process Clink Gear Training* participant should be able to locate the item in Pawnmaster in one attempt without error
- 6) Given a video tutorial with demonstrations, facilitator instruction, and job aids, the *How to Process Clink Gear Training* participant should be able to pull the item into Active Inventory in Pawnmaster in one attempt without error
- 7) Given a video tutorial with demonstrations, facilitator instruction, and job aids, the *How to Process Clink Gear Training* participant should be able to enter the selling price as determined in one attempt without error
- 8) Given a video tutorial with demonstrations, facilitator instruction, and job aids, the *How to Process Clink Gear Training* participant should be able to notate in the item description the storage location of the accessories in one attempt without error
- 9) Given a video tutorial with demonstrations, facilitator instruction, and job aids, the *How to Process Clink Gear Training* participant should be able to print new labels for the item and all included accessories in one attempt without error
- 10) Given a video tutorial with demonstrations, facilitator instruction, and job aids, the *How to Process Clink Gear Training* participant should be able to replace the original labels/tags on the item and all included accessories in one attempt without error
- 11) Given a video tutorial with demonstrations, facilitator instruction, and job aids, the *How to Process Clink Gear Training* participant should be able to move the item either to the repair shop, if necessary, or to an appropriate place on the sales floor in one attempt without error

- 12) Given a video tutorial with demonstrations, facilitator instruction, and job aids, the *How to Process Clink Gear Training* participant should be able to place any accessories related to the item in the appropriate warehouse area in one attempt without error.

Evaluation Strategy

Level I Evaluation: Reaction

After closing, a Level I Evaluation in the form of a smile sheet survey will be conducted to determine participant reactions and feedback on the training content, usefulness, and general experience.

Level II Evaluation: Learning

Directly following *How to Process Clink Gear Training*, a Level II Evaluation will be administered to determine participant knowledge retention. The facilitator will observe and keep time as the participant demonstrates the clink item processes as laid out in the design plan's terminal and enabling objectives. Following the observation, the facilitator will review the participant's performance and will give feedback and correction, as necessary. The time totals will be compared against future evaluations (Levels III and IV).

Level III Evaluation: Application

Based on the steps/tasks learned in *How to Process Clink Gear Training*, a Level III Evaluation will take place in the form of an on-the-job demonstration by the participant, overseen, recorded, and timed by a stakeholder to ensure training has been effective. Level III evaluation should take place 14-30 days after training.

Level IV Evaluation: Organizational Results

Since there has never been formal training for processing clink gear at Atomic Music, a Level IV Evaluation using a control group should be feasible. Data will be collected through timed observations of those employees who have gone through the training process, and those

who have not. This data will be compared and used to reveal the soundness and effectiveness of the training and to inform adjustments to the training as needed.

Participant Prerequisites

The *How to Process Clink Gear Training* participant will be a new or existing employee of Atomic Music and will be a U.S. citizen or U.S. permanent resident. The participant will be proficient in English, both reading and writing, at the 12th-grade level. The ideal participant will have prior knowledge of musical instruments and gear, which will be determined by owners/managers before a decision is made to include any particular employee in this training. A training participant will be a minimum of 18 years of age, have a high school degree or equivalent, or the consent of the owners, and be proficient in the use of a desktop computer. True proficiency in the process will depend on diligence and attention and a participant should be flexible and willing to learn. There is an expectation on the part of the organization that a participant is committed to the training and to performing the duties therein with an attitude of teamwork and camaraderie. The organization will be providing all necessary training supplies. To be sure the training stays on track and maintains the desired flow, the participant will agree to silence their cell phones while training is in session and reserve the sending of messages and the placing and receiving of calls until training is finished. The participant is expected to remain engaged throughout the training, including all activities and evaluations.

Facilitator Prerequisites

The *How to Process Clink Gear Training* facilitator will be a seasoned employee of Atomic Music chosen by the owners to take on the responsibility of training fellow employees. The facilitator will be a U.S. citizen or U.S. permanent resident and will be proficient in English, both reading and writing, at the 12th-grade level. A facilitator will be a minimum of 21 years of age, have a high school degree or the equivalent, or have the consent of the owners. As a seasoned employee of Atomic, the facilitator will have significant knowledge of musical instruments and gear and will be proficient in the use of shop computers and inventory software.

Before implementation, the training facilitator is expected to review all training materials, i.e., the facilitator handbook/guide, the job aids, and the video tutorial with demonstrations. There is an expectation on the part of the organization that the facilitator will be committed to participant success and will approach facilitator duties with an attitude of teamwork and camaraderie. The facilitator will agree to silence their cell phones during training and to remain engaged throughout.

Deliverables

Front End Analysis - Delivered

Training Needs Analysis - Delivered

Design Plan - Delivered

Computer-based Training Module with Software Demonstrations

Lesson Plan/Facilitator Guide

Job Aids

Level I, II, III, IV Evaluation Instruments



How to Process Clink Gear Training Evaluation

Please let us know what your training experience was like by completing the following evaluation.
Your feedback will help to ensure that training is effective and continually improved.
Thank you for participating.

Trainee: _____

Date: _____ Instructor/Trainer: _____

| Questions | Agree | Neutral | Disagree |
|---|-------|---------|----------|
| This training was worth attending. | 3 | 2 | 1 |
| The objectives of the training were clear. | 3 | 2 | 1 |
| I was able to meet the objectives of the training to my satisfaction. | 3 | 2 | 1 |
| The training was well-paced for meeting the objectives. | 3 | 2 | 1 |
| The trainer was knowledgeable on the training subject. | 3 | 2 | 1 |
| The trainer remained engaged during training. | 3 | 2 | 1 |
| The training was completed within the time frame as stated. | 3 | 2 | 1 |
| I felt comfortable asking the trainer questions. | 3 | 2 | 1 |
| The demonstrations were well-paced and easy to follow. | 3 | 2 | 1 |
| I was able to complete the practice exercises with ease. | 3 | 2 | 1 |
| I feel confident performing the tasks included in this training. | 3 | 2 | 1 |
| I think this training will have a positive effect on employee | 3 | 2 | 1 |

Comments

What areas of the training would you have spent more or less time on?

What could the trainer have done differently to improve the training experience?

What do you see as potential areas of improvement in this training?



How to Process Clink Gear Training: Purchase & Intake Procedures

Level II & Level III Evaluations

Training/Learning Outcomes & Application Observation

| | | | | | | | | |
|---|--|-----------------|--------------|--------------|---|-----------------|--------------|--------------|
| Trainee: _____ _____ | Level II Evaluation: Training/Learning Outcomes Trainer: _____ Date: _____ (day of training) | | | | Level III Evaluation: Application Observation Stakeholder: _____ Date: _____ (14-30 days from training) | | | |
| PRE-CLINK ITEM PROCESSING: | Start time | End time | Total | Notes | Start time | End time | Total | Notes |
| 1) Access the Pawnmaster software inventory system using login credentials | | | | | | | | |
| 2) Add and save a new customer using the faux customer info provided for training | | | | | | | | |
| 3) Create a New Transaction and New Buy -Add the item details in the highlighted fields -List all accessories and repairs needed in the appropriate field -Enter the amount Atomic is paying -Enter the resale price as \$0 -Click OK -Click Balance & Save the Buy | | | | | | | | |
| 4) Print appropriate # of labels | | | | | | | | |
| 5) Retrieve the Buy Form from the printer | | | | | | | | |
| 6) Obtain appropriate buy form signatures (for training: trainer) | | | | | | | | |
| 7) Place the signed Buy Form in the Buy Form storage box | | | | | | | | |
| 8) Place labels directly on item and accessories or place labels on tags and then hang tags on item | | | | | | | | |
| 9) Place items and their accessories in the appropriate clink storage area - by purchase date | | | | | | | | |
| Process Time Totals | | | | | | | | |



How to Process Clink Gear Training: Resale Procedures

Level II & Level III Evaluations

Training/Learning Outcomes & Application Observation

| | | | | | | | | |
|---|--|-----------------|--------------|--------------|---|-----------------|--------------|--------------|
| Trainee: _____ _____ | Level II Evaluation: Training/Learning Outcomes Trainer: _____ Date: _____ (day of training) | | | | Level III Evaluation: Application Observation Stakeholder: _____ Date: _____ (14-30 days from training) | | | |
| POST-CLINK ITEM PROCESSING: | Start time | End time | Total | Notes | Start time | End time | Total | Notes |
| 1) Access the Pawnmaster software inventory system using login credentials | | | | | | | | |
| 2) Search for a list of items ready for resale (trainer: override the availability date for the item being used for training) | | | | | | | | |
| 3) Confirm that the item is ready for resale by checking its label/tag | | | | | | | | |
| 4) Remove item from the clink and bring them to the sales floor area designated for items being priced | | | | | | | | |
| 5) Ask a senior staff member to determine a price for each item (predetermined for training purposes) | | | | | | | | |
| 6) Locate the item in Pawnmaster in the Locate Transactions tab -Pull the item into active inventory -Enter the resale price as determined -Add a note in the description as to the storage location of any accessories -Save the changes | | | | | | | | |
| 7) Print new labels for the item and any included accessories | | | | | | | | |
| 8) Replace original label/tag with new one on the item and any included accessories | | | | | | | | |
| 9) If the item requires a repair, take the item to the repair shop, otherwise... | | | | | | | | |
| 10) Place the item on the sales floor, grouped with like items | | | | | | | | |
| 11) Place any cases or accessories in the appropriate warehouse area | | | | | | | | |
| Process Time Totals | | | | | | | | |



How to Process Clink Gear Training: Purchase & Intake Procedures

Level IV Evaluation

Organizational Results/Observations

| Stakeholder Performing Evaluation: _____ | Previously Trained Employee (from Eval Levels II & III) Employee Name: _____ Date: _____ (day of this evaluation) | | | | Untrained Employee (control group participant using job aid only) Employee Name: _____ Date: _____ (day of this evaluation) | | | |
|---|---|----------|-------|-------|---|----------|-------|-------|
| PRE-CLINK ITEM PROCESSING: | Start time | End time | Total | Notes | Start time | End time | Total | Notes |
| 1) Access the Pawnmaster software inventory system using login credentials | | | | | | | | |
| 2) Add and save a new customer using the faux customer info provided for training | | | | | | | | |
| 3) Create a New Transaction and New Buy -Add the item details in the highlighted fields -List all accessories and repairs needed in the appropriate field -Enter the amount Atomic is paying -Enter the resale price as \$0 -Click OK -Click Balance & Save the Buy | | | | | | | | |
| 4) Print appropriate # of labels | | | | | | | | |
| 5) Retrieve the Buy Form from the printer | | | | | | | | |
| 6) Obtain appropriate buy form signatures (for training: trainer) | | | | | | | | |
| 7) Place the signed Buy Form in the Buy Form storage box | | | | | | | | |
| 8) Place labels directly on item and accessories or place labels on tags and then hang tags on item | | | | | | | | |
| 9) Place items and their accessories in the appropriate clink storage area - by purchase date | | | | | | | | |
| Process Time Totals | | | | | | | | |

NOTES:



How to Process Clink Gear Training: Resale Procedures

Level IV Evaluation

Organizational Results/Observations

| Stakeholder Performing Evaluation: _____ | Previously Trained Employee Employee Name: _____ Date: _____ (day emp trained) | | | | Untrained Employee (control group) Employee Name: _____ Date: _____ (day of this evaluation) | | | |
|---|--|----------|-------|-------|--|----------|-------|-------|
| ITEM RESALE PROCESSING: | Start time | End time | Total | Notes | Start time | End time | Total | Notes |
| 1) Access the Pawnmaster software inventory system using login credentials | | | | | | | | |
| 2) Search for a list of items ready for resale (trainer: override the availability date for the item being used for training) | | | | | | | | |
| 3) Confirm that the item is ready for resale by checking its label/tag | | | | | | | | |
| 4) Remove item from the clink and bring them to the sales floor area designated for items being priced | | | | | | | | |
| 5) Ask a senior staff member to determine a price for each item (predetermined for training purposes) | | | | | | | | |
| 6) Locate the item in Pawnmaster in the Locate Transactions tab -Pull the item into active inventory -Enter the resale price as determined -Add a note in the description as to the storage location of any accessories -Save the changes | | | | | | | | |
| 7) Print new labels for the item and any included accessories | | | | | | | | |
| 8) Replace original label/tag with new one on the item and any included accessories | | | | | | | | |
| 9) If the item requires a repair, take the item to the repair shop, otherwise... | | | | | | | | |
| 10) Place the item on the sales floor, grouped with like items | | | | | | | | |
| 11) Place any cases or accessories in the appropriate warehouse area | | | | | | | | |
| Process Time Totals | | | | | | | | |

NOTES: