

Sample Training Plan

This is a sample training plan for a company that makes a smartphone app for travelers who are exploring new cities.

Customer Service Vision: We help travelers discover new experiences.

Objectives

Organizational culture, structure, and governance

1. What is the customer service vision?
2. What does the customer service vision mean?
3. How do you personally contribute to the vision?

Training Plan

How will you ensure employees answer the three questions above?

Step	Action
1	Discuss the vision with employees. Explain how it is connected to the service we provide. For example, share reviews and survey comments from happy customers.
2	Have employees shadow the customer support team to listen to calls and read emails, in-app messages, and social media questions. Debrief afterward and ask them to describe any obstacles they saw that could make it hard to achieve the customer service vision.
3	Send employees on a scavenger hunt in their city, using the app to guide them. Afterward, ask them to describe how the app helped them discover something new.
4	Ask employees to answer the three questions to verify the learning objectives are complete.

Reinforcement

How will you reinforce what was learned so employees retain this knowledge?

- **Challenging assignment:** Review customer feedback with employees each month. Ask each employee to take ownership for helping to solve one issue that will help us better deliver on our vision.
- **Coaching or mentoring:** Incorporate a discussion of the vision into all monthly one-on-one meetings with managers and employees.
- **Formal training:** Hold an annual refresher training session on the vision.