TASK ANALYSIS WORKSHEET #1: AUDIENCE ANALYSIS

Job Title	Job Description	Audience
Reliable Utilities Customer Service Representative	Respond to all customer phone requests and concerns	Bookkeepers

Characteristics/Factors	Data
Number to be trained	Will vary but approximately five at various times of the year (7 or 8 times per year)
Location of audience(s)	At same location
Experience level (homo- or heterogeneous)	All are experienced bookkeepers
Education level	Varied (no impact here)
Reading level	Average reading level is 5th grade
Native languages (any international uses)	No language or international concerns
Attitude toward training	Willing
Other	This is **cross training for bookkeepers** in *one area of customer service only: handling service installations.*

Prerequisite Skill or Knowledge	Description
• Familiarity with phone system • Familiarity with computer system	• Knows how to pick up phone when red light is on • Knows how to get into the system but is not familiar with the necessary Payment Record Screen

TASK ANALYSIS WORKSHEET #2: FUNCTIONS OF A JOB

Job Title	Job Description

Function	Description
Handling service installation calls	Process customer request for service installation.
Answering billing questions	Resolve customer questions / disputes regarding bills.
Resolving credit problems	Resolve customer difficulty in payment of bills.
Responding to service problems	Determine likely problem and refer to service or repair.

TASK ANALYSIS WORKSHEET #3: TASKS OF FUNCTIONS

Training Program	Function	Page
Reliable Utilities Customer Service Representative	Handling service installation calls	1 of 1

Task #	Task	Description	Task Type (check one)
1	Receive the call.	Answer phone with standard greeting, identify request, and transfer as needed.	☒ Procedural ☐ Principle-based
2	Complete customer information screen.	Obtain customer data and input into computer: name, phone, SSN, installation address, and desired installation date	☒ Procedural ☐ Principle-based
3	Establish customer credit.	Decide if deposit is required based on prior service (good payment record), residence ownership, and employment.	☒ Procedural ☐ Principle-based
4	Complete the call.	Record deposit arrangements and verify information including installation date.	☒ Procedural ☐ Principle-based

TRAINING & CONSULTING

TASK ANALYSIS WORKSHEET #4: PROCEDURAL TASKS

Training Program	Function	Task #	Audience	Page
Reliable Utilities Customer Service Representative	Handling service installation calls	3	Bookkeepers	1 of 1

Task Name: Establish customer credit.

Step	Action	Knowledge Needed	Content Type of Knowledge: Fact	Content Type of Knowledge: Concept
1	Click on the Credit button on the Customer Information Screen.	Location of the credit button.	☒	☐
2	Type customer's (SSN) and press Enter.	What does Credit Information screen look like?	☒	☐
3	Ask the customer, "Have you had prior service in your name?" If *yes*, check "yes" box in the 1 Year+ Service and go to Step 4. If no, go to Step 5.	What is prior service? Location of "yes" box on the screen.	☒	☒
4	Determine if payment record is Good/Poor and make appropriate selection on the Payment History Screen.	Criteria #1 = Good Payment Record Location and meaning of payment codes	☒	☐
5	Ask the customer, "Do you own the installation residence?" If *yes*, check "yes" box; and go to Step 6. If no, go to Step 6.	Criteria #2 = Residence Ownership Location of "yes" box on the screen.	☒	☐
6	Collect and input the customer's employment data.	Criteria #3 = Current Employment Location and meaning of employment fields.	☒	☐
7	Determine if a deposit is required. If yes, check "yes" box on and complete call. If no, complete call.	If the customer meets any one of the 3 criteria, a deposit is **not** required.	☒	☐

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Task/Lesson Objective (Terminal):

Given...	a role play, and the computer system
the trainee will...	complete the Credit Information screen and determine if a customer deposit is required
at a standard of...	with no errors.

Knowledge Objective(s) (Enabling/Supporting):

Given...	five sample customer Payment Record screens
the trainee will...	label each as either Good or Poor in terms of payment history
at a standard of...	no errors.

TASK ANALYSIS WORKSHEET #6: STAGES OF PROCESSES

Training Program	Function	Task #	Audience	Page
Reliable Utilities Customer Service Representative	Handling service installation calls	3	Bookkeepers	1 of 1

Process Name: Reliable Utilities Billing Cycle

Stage	Description (What Happens)
1	During the month, a bill is sent to the customer.
2	One month and 14 days later, an *overdue* notice is sent.
3	One month and 28 days later, a *warning* notice is sent.
4	The customer's service is disconnected.

Knowledge Objective (Optional):

Given...	
the trainee will...	
at a standard of...	

Case Study: Analysis Tree

Job

Reliable Utilities Customer Service Representative

Functions

- Handling Service Installation Calls
- Answering Billing Questions
- Resolving Credit Problems
- Responding to Service Problems

Tasks

- Receive the call
- Complete Customer Data Screen
- Establish Customer Credit
- Complete the call

Process Stages

1. During the month, a bill is sent to the customer.
2. One month and 14 days later, an overdue notice is sent.
3. One month and 28 days later, a warning notice is sent.
4. 24 hours later, the customer's service is disconnected.

Steps	Knowledge Needed
1. Click on the Credit button on the Customer Information screen.	1. Location of Credit button.
2. Type customer's SSN and press enter.	2. What Credit Information Screen looks like.
3. Ask customer, "Have you had prior service in your name?" If yes, check the "yes" box in the 1 Year+ Service section and go to Step 4. If no, go to Step 5.	3. What is prior service? Location of "yes" box on screen.
4. Determine if payment record is Good/P and make appropriate selection on the Payment History screen.	4. Criteria #1 = Good payment record. Meaning of payment codes.
5. Ask customer, "Do you own the installation residence?" If yes, check "yes" box and go to Step 6. If no, go to Step 6.	5. Criteria #2 = Residence Ownership Location of "yes" box on screen.
6. Collect and input the customer's employment data.	6. Criteria #3 = Current employment. Location and meaning of employment fields.
7. Determine if a deposit is required. If yes, check "yes" box and complete call. If no, complete call.	7. If customer meets any one of the 3 criteria, a deposit is **not** required.