

Introduction to Instructional Design
Needs Assessment

CARQUEST Auto Parts

Jennifer DeLarm

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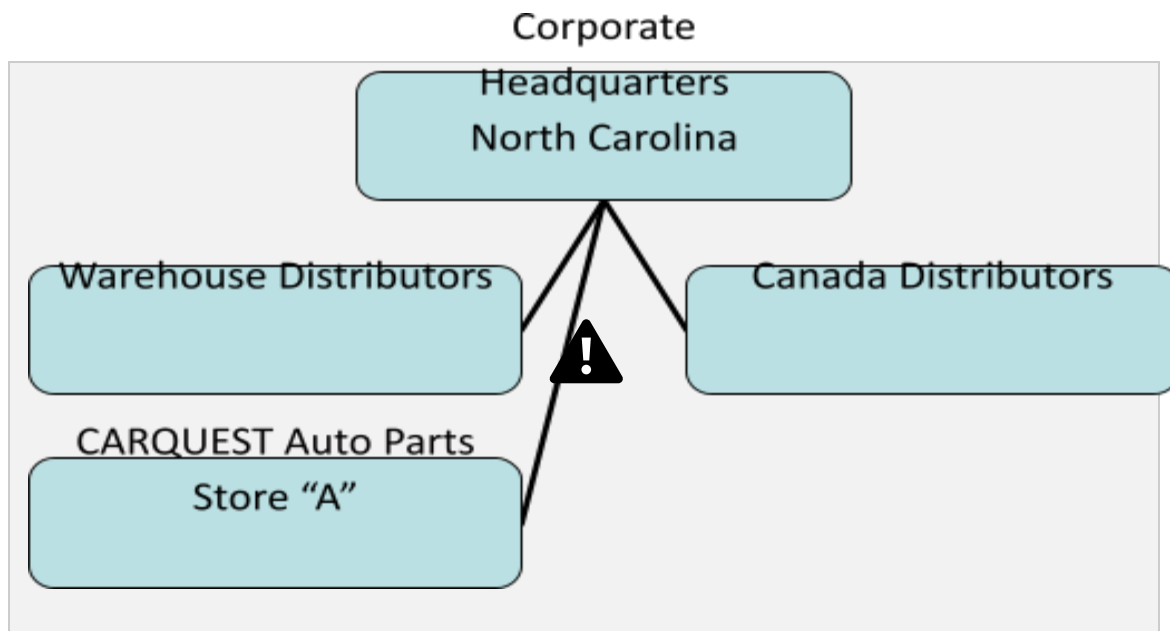
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Overview & Rationale

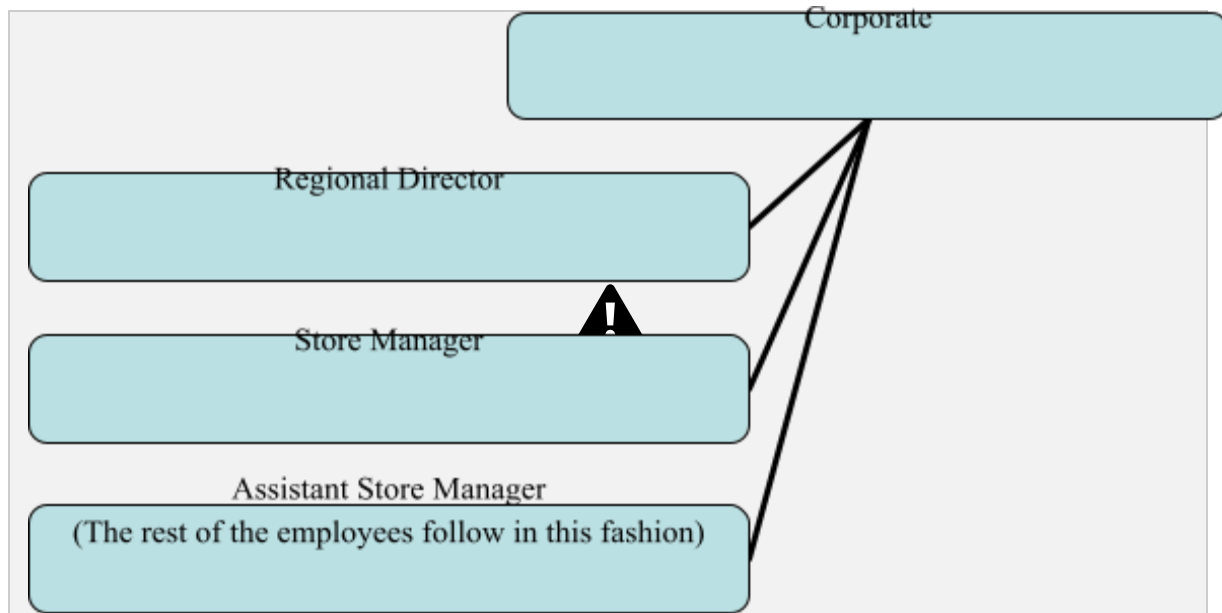
CARQUEST Auto Parts store is a chain of auto-supply stores. There are over 3,000 Auto Parts locations in North America. For the purpose of this needs assessment, one CARQUEST store, labeled “A” to protect anonymity will be assessed. The company is a supplier of Auto Parts to National Account customers like Goodyear, Firestone, CarMax, Meineke, Midas and American Tire Dealers. CARQUEST Corporation is a marketing umbrella for various Warehouse Distributors to better market the brand. One major Warehouse Distributor over the years has acquired control of a majority of operations and is based in Raleigh, North Carolina; this is also the location of the Corporate Headquarters. Recently, new Warehouse Distributors in California and Texas have been acquired. Its marketing range includes all of North America and includes Canada with over 200 stores and 3 Warehouse Distribution centers in Toronto Ontario, Montreal Quebec, and St. John New Brunswick. CARQUEST Auto Parts is the premier supplier of replacement products, accessories, supplies and equipment for virtually all makes of automobiles, as well as light and heavy-duty trucks, off-road equipment, buses, recreational vehicles and agricultural equipment. Additionally, it distributes and sells tools, equipment, chemicals, paint and accessories. In order to better understand this company, here is how it is structured.



The CARQUEST Auto Parts store “A” had high selling averages and high performance records until one year ago. The high quality of customer service that is supposed to be presented by each employee as well as their top notch delivery system and high outside sales slowly started declining until ultimately disappearing and causing corporate wide issues.

Within CARQUEST Auto Parts Store “A” there is a structure that will be useful to know

in order to process the needs assessment. It is composed of a store manager, assistant store manager, outside sales representative, customer service delivery teammate, machinist and customer service teammate. However, when problems arise, such as a decline in sales and customer service, the regional director is contacted as well as Corporate. In order to better understand the structure of this particular store, here is how it is structured.



As shown above, every position in the company is under corporate. When a problem arises, the Regional Director who is under Corporate is sent out to investigate and see if the problem can be fixed easily, if not, action must be taken. The Regional Director will consult with the Store Manager first because the store manager is the person who controls the store for their area. The Store Manager is also supposed to communicate with the Regional Director immediately via telephone conference if something is going wrong with their store. If there is a valid concern, such as a rapid decline in sales, an interview in person with the Regional Director will be set up.

Once the interview in person is set up and the Regional Director and Store Manager meet, they lay out exactly what the problems are that are occurring, what should be happening in the store, if the problem is caused by deficiencies in knowledge, skills, or attitudes from employees, how important fixing the problems are and the steps to be taken to find the solution and fix the problem(s). However, in order to lay out the steps to fixing a problem, it is important to understand a few things about the employees within store "A."

In order to become a Store Manager, it requires a background in a management position from previous employment. It is possible to move up in the company, but most managers come

from the outside and are recruited in. Once they are recruited, they go through a two week training process to become familiar with the company. This two week training process also applies for any other positions in the company. All of the customer service delivery teammates, the machinist, the outside sales representative, the assistant store manager and the customer service teammates go through a two week training process. The only difference with this process for these employees is that the training is tailored for individual position (Ex. teammates won't be trained for the machinist job since that is not their area). Also, once each employee, other than the store manager, has completed the two week training process, they stay under a probationary period for 90 days.

This probation period is to test the employee to make sure they understand the company, policies and procedures. It is also there to make sure the employee is a right fit for the store. The downside to this process is that the store manager does not have the time to meet individually with the employee after their training is over to make sure they understand what they learned. Instead, the employee is immediately set to work in the store. If they are not a good fit, they can either retrain, move to a different store, or if that doesn't work, they will have to be let go. However, CARQUEST Auto Parts is committed to helping professional technicians and automotive enthusiasts stay on top of the latest trends, components, techniques, skills and tools, so the company will do its best to help the employee, as long as the employee is willing to learn.

Recently though, store "A" has seen a decline in the high quality of customer service, the top notch delivery system and the high amount of outside sales. In order to address the issues, the Store Manager first has to pull the sales reports, the delivery paperwork and the corporate wide inventory sheets to see where the issue is located. If the issue is directly related to customer service, the Sales Manager must then assess each employee. If the issue is related to the delivery system, the Store Manager must assess all of the delivery paperwork and see if deliveries incoming/outgoing are being made on time or not. If the issue has to do with the outside sales, then corporate must be contacted as well as the Regional Director because the outside sales representative is a position which is above the Store Managers abilities to fix.

This needs assessment plan is to identify the gap between the existing level of customer service, the delivery system operations and the outside sales with, where the level of the customer service, delivery system operations and outside sales are supposed to be. Fortunately, the current problems seem to be directly related to store "A" only and none of the others in the area, therefore focus can be placed solely on one store. Also, before any changes can be made in the store, the plan must be submitted to Corporate only after it has been discussed thoroughly by the Regional Director and the Store Manager in an in-person interview. If the needs assessment plan is approved by Corporate, store-wide changes will occur immediately.

In store "A's" case, the Store Manager was able to find a multitude of issues that were

resulting in the decline of customer service, store sales and a decline in the number of deliveries being made and received. The problems areas (gap) are as follows:

1. Some of the employees in the store were unwilling to retrain to improve their skills because the system they originally trained with was unhelpful and in order for the employees to help the store make sales, they must be up-to-date with their training.
2. Some of the customer service delivery teammates were intentionally missing deliveries and not filing the correct paperwork, which is causing not only a gap in total merchandise inside the store, but in the computer system that corporate monitors.
3. Some of the customer service teammates were intentionally ignoring incoming deliveries which is causing a gap in merchandise totals inside the store and it is ultimately affecting the amount of sales the store can produce.
4. The outside sales representative was not relaying the promotions of the store to the outside companies that do business with CARQUEST. The outside sales representative was also being rude to the outside businesses when they asked questions regarding sales available, therefore causing those outside businesses to turn to other stores, resulting in a decline in store “A’s” sales.

Feasibility

This needs assessment is both needed and feasible. The cost would be low for the store to fix the problem gaps and would benefit the store in the long run in several ways.

Resources available- retraining employees is one avenue available and is inexpensive because it can be completed via the “Vehicle knowledge” computer system inside the store. If the employee has an issue with the training they originally completed, 3 different versions of the “Vehicle knowledge” computer system are available.

Organization- daily computerized delivery monitoring systems are available for each store to organize all incoming and outgoing deliveries. Many stores are gradually shifting from paper printouts to the new electronic verification system. For store “A,” the switch to electronic delivery monitoring systems would help control when the deliveries are made to outside customers and when they arrive at the store. Therefore eliminating the ability for employees to not process paperwork and it would also keep the store more organized product-wise.

Eliminating employees hurtful to the company- by either eliminating (firing/laying off) or transferring the outside sales representative, the store has a better chance of regaining the bond between them and the outside businesses. Outside stores such as Goodyear, Firestone, CarMax, Meineke, Midas, American Tire Dealers and others are essential to the sales store “A”

makes everyday. If business from them is driven away because the outside sales representative is poorly representing the CARQUEST store by being rude or not answering needed questions, action must be taken immediately.

Benefits and costs- The benefit of using other retraining systems for those employees who are having issues inside store “A” is directly linked to the amount of sales possible for the store. If the employee is up-to-date on the latest trends, industry information, sales available and the best ways to present these to the customers, the stores sales have a chance of improving therefore making it a benefit to retrain. The cost for using these other retraining systems is low because it is done on the computers at the store. The employee is able to see the products they are learning about first hand in the store so they have a better chance of making a connection between the products they learned about, how to sell that product and then producing sales. For the delivery issues a system is now available that would greatly benefit store “A.” It is called a computerized delivery monitoring system. It is low in cost because it eliminates paper waste, issues with deliveries being logged in and out and can be installed over a weekend so no impact to store sales would result from its installation. As for the outside sales representative, the benefit of removing or transferring them would help with increasing store “A’s” sales and it would give the store a chance to re-form a business relationship with those outside stores in the area that were previously lost. The cost of removing (firing/lay off) or transferring the outside sales representative would also be low because firing or laying off doesn’t cost anything. As for transferring, it doesn’t cost the company any money to transfer them because the representative has already done the required training and even in the case of needing to be retrained, there is still no cost.

The Plan

Objectives- The needs assessment will accomplish the following for store “A”:

For Employees:

- Identify the gaps of knowledge, skills and attitudes and determine if the employees need to be retrained or fired/layoff.
- Provide a brief time period for the Store Manager to meet with the employee to discuss being retrained and their options.
- Implement other available systems of retraining to employees who are falling behind in sales once specific areas are found that the employee needs to retrain in.

- Establish goals for the employees during their training to make sure the retraining is working.
- Assess other options if training doesn't work.

For Deliveries:

- Identify via delivery paperwork where the gaps are.
- Determine if the gaps can be fixed by the Store Manager or by other options (the new system).
- Install the computerized delivery monitoring system for incoming/outgoing deliveries to improve product records.
- Set up a time for each employee to become familiar with this new system.

For the Outside Sale Representative:

- Identify the gaps in performance from the outside sales rep.
- Determine what solution would be best (transfer or fire/layoff).
- Transfer or fire/layoff the outside sales representative.
- Regain business relationships with those stores that were previously lost.
- Increase store "A's" sales by keeping those stores (once the relationship is regained) up-to-date on all prices and sales occurring at the store "A."
- Develop solutions for avoiding these conflicts in the future.

Target Audience:

Performers- the people of this group who will be identified through the needs assessment include:

- **Customer Service teammates-** This group of employees is the main cause for the need for retraining. They are the group who represents the store on the phone and to customers walking in the door.
- **Customer Service Delivery teammates-** This group of employees is the cause of the store "A" needing an updated computerized delivery monitoring system.
- **Outside Sales Representative-** This person represents the store to other businesses like Goodyear, Firestone, CarMax, Meineke, Midas and American Tire Dealers. They are supposed to bridge the gap between the store and pulling in outside sales that aren't from regular citizens in

the community.

Decision Makers- this group identifies where the issues are and what needs to be done.

- **Store Manager-** pulls all sales reports, the delivery paperwork and the corporate wide inventory sheets. Then addresses where the weak links are located.
- **Assistant Store Manager-** helps the Store Manager with the process of identifying weak links if the store gets too busy and focus needs to be maintained.
- **Regional Director-** bridges the gap between the Store Manager and Corporate. They are contacted when the store is unable to fix the problem from within and needs further help.
- **Corporate-** they oversee all changes, both from within the store and if further assistance is needed. In the case of any store wide changes including installing the new delivery system, they must be consulted first via telephone conference or email.

Sampling procedures- Due to the small group of employees at store “A” who are each important to be represented individually and the fact that each employee position is in a hierarchical structure, stratified sampling will be used for this needs assessment.

- **Performers-** the Customer Service Teammates, Customer Service Delivery Teammates and the Outside Sales Representative.
- **Decision Makers-** the Assistant Store Manager, Regional Director and Corporate.

Data Collection Strategies & Tactics:

- **Direct Observations-** before the Store Manager contacts the Regional Director, direct observations of each employee must take place in the areas where the gap is present. Since there is only one Store Manager at store “A,” the Assistant Store Manager may be used to help the Store Manager collect data from the direct observations of those employees creating the gaps. This first step is crucial in figuring out if the Store Manager can fix the gap from the inside or if the Regional Director must be contacted for further assistance. Direct Observations will also be used by the Regional Director when they come to the store during the face to face interview.
- **Phone Interview-** once data from the direct observation has been collected and the Store Manager is unable to fix the gap from within the store, the Regional Director must be contacted. This step is the first in communication between the Store Manager and the Regional Director who is higher up in the company and can assist with fixing the gap. During this phone interview,

the problem will also be assessed and they will determine whether or not to set up a face to face interview.

- **Face to Face Interview-** this will happen once the Store Manager has discussed the gap in the store with the Regional Director during the phone conference. It is important for the Regional Director to conduct a face to face interview not only with the Store Manager but with the employees who are making the gap due to lack of knowledge, skills or attitudes.
- **Questionnaires-** these will be conducted by the Regional Director when visiting the store during the face to face interview as well as prior to the visit so the employees and Managers are prepared. The questionnaires will collect the needed information for the Regional Director to make specific choices during the discussion with the Store Manager as to what will change. Such questions would be given:
 - What areas are most affecting the stores sales? (Given prior to the Store Manager)
 - How do you think the stores sales could be improved? (Given prior to the Store Manager)
 - Is the store environment causing these issues or is it employee related? (Given prior to the Store Manager)
 - How do you think the delivery system could be fixed? (Given to the Store Manager)
 - Do you need additional staff to raise store sales? (Given to the Store Manager)
 - Was your training effective in helping you learn about the company? (Given to the employees)
 - If it wasn't effective, how could it be improved? (Given to the employees).
 - Are there any issues when you perform your job? Such as: are extra employees needed, do you have enough time to perform your job of making sales, is the working environment too stressful? (Given to the employees)
 - Would it help if additional training was given? (Given to the employees)
 - If additional training is required, how can it be improved from your original training? (Given to the employees)
 - Are you satisfied with the way the store is running and making sales? (Given to the employee)
- **Email-** this will take place before and after the Regional Director has met with the Store Manager and any changes have taken place. It will happen before when sending the questionnaire to be completed by all associates in store "A." It will be used after changes have taken place to ensure that the store is now making sales and the needs assessment worked

successfully.

Instruments and Protocols:

Instruments:

1. Checklist- made up by the Store Manager of all the issues (gap).
2. Direct Observations- come from the checklist made by the Store Manager.
3. Interviews- both phone and face to face will occur between the Store Manager, the Regional Director and the employees involved in the stores gap.
4. Questionnaires- given prior to the Regional Director's visit and during the interviews. The prior questionnaire will be assessed by Corporate before the Regional Director makes the trip to the store. Corporate will also be contacted with the questionnaire results during the Regional Director's visit.
5. Email- will be used to electronically send all questionnaires, comments and possible changes.

Protocols:

1. Interaction- This will happen between the Store Manager, the employees causing the gap and the Regional Director. If needed, Corporate will interact with the Store Manager if the Regional Directors assistance is not enough to solve the problems.
2. Approval- In order for any changes to occur in store "A," Corporate approval must be given.
3. Reports- all results of the needs assessment should be reported to the Store Manager, the Regional Director and to Corporate Headquarters. These reports will be stored for future use in case problems of the same nature occur again. Periodic results will be sent to the Regional Director from the Store Manager. These periodic results will show whether or not assistance is required again or if the needs assessment plan worked.
4. Extra information- Questions such as: have previous Store Managers run into these same problems (gap)? If they have, what did they do to fix the gap, if they did anything at all? What methods were used that received the most results?

Procedure (Implementation Plan): In order to implement the needs assessment, all of the associates in store "A" must participate. These steps will be taken:

- Investigate where the problems (gap) are and what has been affected.

- Find out when the problems (gap) started and by who/what.
- Conduct direct observations of employees and problem areas.
- Create a checklist of the problems to submit to the Regional Director for discussion.
- Consult with the Regional Director via telephone and face to face interviews.
- Complete questionnaire from the Regional Director.
- Consult with Corporate if needed.
- Analyze the problems (gap) with help of the Regional Director.
- Submit the problems detected by the Regional Director and Store Manager to Corporate for approval to fix the problems.
- Implement new systems, training and removal/transfer that were approved by Corporate.
- Conduct direct observations after new procedures, training and removal/transfer have taken place to make sure store “A” is now making the appropriate amount of sales.
- Report results to the Regional Director and to Corporate for future reference.

Summary

CARQUEST Auto Parts store “A” should take immediate action to address the declining customer service, delivery counts and outside store sales. Even though the problem is only occurring at store “A,” the lack of sales, misfiled delivery paperwork and low outside sales affects the company overall. This needs assessment will help identify which employees need to be retrained, where the problem with delivery counts is and the issue of a lackluster outside sale representative. By improving the quality of customer service, delivery incoming/outgoing counts and the business relationship between store “A” and other businesses in the area through the outside sale representative, overall store sales will be able to improve and store “A” will be able to create bonuses and pay raises for the employees.