

California Contract Education TAP Boot Camp

Slide 1: Unit 8 – Quality Assurance

Unit 8: Quality Assurance

Slide 2: This set of slides covers...

This set of slides, which is the last in the series, covers quality assurance, how to conduct a QA meeting in two phases, and how to use each of those phases as a booster for sales. So this is a really important topic. It's also going to reference a little bit, emphasizing training and pretty much everything else you do as an investment, not a cost.

Slide 3: LERN's two-phase QA process

So LERN recommends that we talk about quality assurance in two phases. One is concurrent evaluation; that is, the evaluation of quality that happens during the training. And the second one is the post intervention evaluation, which happens after the training.

Slide 4: Concurrent assessment

By concurrent assessment, what I'm talking about is when you go into a training, and you're looking to see whether or not the training is meeting the goals that you and the client set for the training and whether or not anything's getting in the way of that.

Slide 5: Concurrent assessment sample points

So for example, we might be talking about: Is the curriculum still on target? Sometimes you build a class and people say, "Well, there'll be people with advanced skills coming in," and you get there and you discover, of course, that No, they're not advanced at all. And so you're gonna have to backtrack and change the curriculum a little bit. And so at that time, the instructor may need a little support from you.

Slide 6: Concurrent assessment sample points – 2

We're really looking for any other changes that need to be made midstream. This could be something in the catering. It could be with parking. It could be absolutely anything that will get in the way of the client's sense that you really did what you said you were going to do. And of course, one of the things we'll be checking in on is how do they feel about the instructor so far? And if there's any small or large problem that needs to be changed, what would they like us to do about that? We're really checking in here to see have they heard anything from the people in the classroom? And in particular, are there any small, what I call parking lot issues-- which sometimes literally are issues about parking--that we can be fixed and fixed early so that they don't get in the way in the client sense of quality of the training?

Slide 7: Post-intervention assessment

The post intervention assessment happens after. This is the one we think about most common, I think. You're going to contact the client again and say, "How did we do?"

Slide 8: Post-intervention sample points

So for example, we're going to say, "Were the pre-intervention assessment goals met? And is it clear to you how the application of the training will occur?" Now this point is really, really important. And to be honest with you, I think only about 20% of training projects include addressing how will the students in the classroom be expected or be supported to go out into the workplace and apply what they learned?

We're also asking the client, do they need any kind of follow up from us at all? Did the instructor, for example, promise a handout or something that we want to follow up...make sure that it happened? And then this one--and this one is absolutely key if you're the salesperson.

Did the instructor or the client or did the participants mention on the evaluations that they saw a need for further training? And certainly if that's not a question on your current contract education evaluations, it should be now. Because this piece of the quality assurance meeting, and in particular asking that question: Need for follow up training? or How will we use this back in the workplace?

Slide 9: Conducting a QA meeting

So how do you do these quality assurance meetings? The first thing is, it should be done by the salesperson again, because as I mentioned, it's a foot in the door for a sales-oriented meeting. Second of all, it should be a short meeting: 10-15 minutes. So tell clients, it will be a short meeting, you won't take up much of their time. And then unless they encourage you to stay, get in, do what you need to do, get out, and then send a thank you note for this. I really think it's important to send a handwritten thank you note.

Slide 10: When there's a problem

So first of all, you know, sometimes there is a problem that we have to address. And when that happens, if you've done any portion of the quality assurance, by email or on the phone, I think it's great if you can, to go there for a face-to-face meeting. So when you learn about that meeting, come out and inquire with your staff. Do you know anything about this? Does anybody know how this happened? Was there a way we could prevent it? That sort of thing. Ask them for input. Talk about it together and then create a plan to solve it and stay on top of the plan. Because once something goes wrong with the contract, isn't it pretty often that the ball just keeps rolling in the wrong direction.

Slide 11: Three ways to look at a problem

If you do have a problem, there are three ways to look at it or three kinds or levels of problems. And I really like this model a lot. And I like to train the staff to look at it. One is we had a problem that was an event, something happened, it didn't go well. But it's unlikely that it will happen again, it was something very particular to that day, that instructor, that location, something like that.

Another level of problem, and these you want to pay a little bit more attention to, are what I would call pattern problems. That is, every time we do XYZ, we get a problem with that. Pattern problems are worth spending some time on, and deciding what you can do to fix and especially to prevent those problems. And then the third thing is the structural problem.

A structural problem is really an in-house fix. It oftentimes has very little or even nothing to do with the client. There's something about the way you're doing the work, something about even the way you're thinking about the work--that it's not important or that it's somebody else's job to fix problems that arise, something like that. Those are structural issues. And so those are fixed by sitting down in house

with your own staff thinking about what makes them happen, what are the causes and the conditions under which they happen, and what you can do about that. And then gradually work to improve your process.

Slide 12: Dealing with a client complaint

When you're dealing with a client complaint, and you probably know this, but the first thing is to empathize. They had a problem, they had a disappointment, you want their business in the future. So fix it. And when you're talking, be sure you get every last little detail. Sometimes it's uncomfortable to sit there and listen to the client describe their problem. Sometimes we feel like, gosh, they're blaming things on us that are not really our responsibility or not wholly our responsibility. But listen to the end. That'll make them feel good. That'll actually get them to stop talking sooner. If you say things like, "This is so helpful that you're telling me this. Is there anything else?" And we say that until really they're quite done talking.

Agree with what you can be agreed with. So I'm not saying you should take responsibility for things that have nothing to do with your responsibility. But surely, there's one or two points that you could agree with and for what you could accept responsibility. Get back to them as soon as possible on this, even though you'd like to avoid it. Just really, you know, go in and make it happen.

And then I always think it's helpful decorum before you leave to find some common ground on something else. Well, you might say the evaluations are really good. And you and I are both glad that the students were happy with the class, something like that. That's what I mean by common ground. And then agree upon what would be an appropriate solution, and implement that. And be sure to go back and make a follow up call to be sure that the implementation was complete in the... in the clients eyes, and then go back with your team and be sure you have closure on the issue. See what it was that you learned from this event and how you will go forward in the future with that learning.

Slide 13: Follow up with a client afterwards

I like to follow up with the client after they raised an issue. So after we have this meeting, to talk about the problem, I would send a memo outline. Outline the results of the quality assurance audit to the client; these are the things that we've done and will do going forward and so on. Issue a corrective action request or CAR report, I call these, for any problems. These I like to keep on file in the office and follow up with staff about these, and then monitor the progress and report the final fix to your client.

Slide 14: QA for long-term projects

Now, for long term projects it's a little bit different, we need to do one more, more than one quality assurance report. Because if we wait until the very end, it may be something that happened in the middle of the project. So I like to schedule the progress reports and one of the convenient times to do it is if they're making interim payments as you go along. And in a long project, that's a great time to sit down and say, "Okay, this is the time for, you know, the quarterly payment. And so we'd also like to update you on what we've done, and how we feel about quality on that and how you feel about the quality as we've gone along here." I think when you use those systematically timed reports, it creates a comfortable and predictable platform for bringing up problems. And so the client, if they have a problem, they're not calling you and interrupting every work day. They know that on x date at x time, they'll be meeting with you talk about the problem.

Slide 15: Long-term QA reports

So what would you include in a progress report? Well, I do something like this: Work completed to date. The benefits to the client of the work that was done so far or done in this work cycle. And I would really emphasize that we're not just talking about the work done, but the benefits to the client from the work done. Or if you've met some or of one the client's goal-- and be sure that they know about that-- this will of course help them feel better about the payment that they need to make from the project at this time. Then also, if I, if you note any problems, and you may note them, sometimes the client's actually not paying attention or for other reasons, they just don't notice. So if you've noticed some, I'd go ahead and write those down and say what you should do about those now. And then I would bring up any recommendations or decisions to be made to enhance success in the next phase of the work. And of course, at the end of the project, you want to have a final quality assurance report.

Slide 16: Benefits of systematic QA reporting on long-term projects

Why would you do this kind of systematic quality assurance reporting on long term projects? Well, the first thing for you is it keeps you on track, it keeps you disciplined, it keeps you thinking about what's working and what needs work. And it provides a predictable and scheduled place for you to stop and assess and adjust. And these are really important in terms of staying on top of your quality and keeping good client relationships.

They're also helpful in the case of a dispute. What I mean by that, for example, is if you have a long project, and the client says well we're not really happy with this, you can pull out the four quality assurance reports, or the three or the 10, or whatever you did, and say, "Gosh, each time you signed off saying you were satisfied. So it's difficult for us to know there's a problem, if you don't let us know." This is a pretty important and sometimes helpful thing. We don't have to call on that very often. But sometimes it will help in a situation where a client is not really quite being honest about the quality issue. For the client, the benefit is that they have a sense of confidence that you're paying attention and that you are worthy of their trust.

Slide 17: QA meetings with your staff

So do these quality assurance meetings regularly with your staff, don't wait until there's a problem. Have a monthly or quarterly or whatever, however often it needs to be-- weekly if you're a really busy unit --quality assurance meeting, if you made a mistake, you in particular, I mean, not the unit, acknowledge your mistake. Maybe you weren't paying quite as much attention to something as you could or you got to something a little late, or you weren't as accessible as you could be. This sets a good tone and good culture for the other people in the meeting, that leadership will also take responsibility.

Remember always to fix the problem; don't punish the person in the process. Those are two separate very different processes. You want people to come forward with problems. Even internal feedback is just absolutely golden. And if you punish people when there's a problem, even if it's just sort of sidelining the person and blaming the person, they'll be really reluctant to raise those with you in the future. And you'll miss out on that great feedback and learning. One of the things that I like to say to people is failure is actually expensive. And so we can't afford to waste it. We need to learn something. We need to improve our processes each time we fail. And so it's actually kind of a valuable part of our work day.

Slide 18: Training as a return on investment (ROI)

I think it's important that you train staff and also train clients to talk about training as a return on investment. Each time we do a training, we are really asking to be given the privilege of using the money, the investment money that the client has, and they can use it for a lot of things, training's not the only thing. They could hire more people or use it to buy new equipment.

And so we have to make the case that training isn't just a cost, it's an investment. And then we should talk generally. I don't think it's necessarily important to calculate it in numbers, but we should say what they're getting back for their investment.

Slide 19: Summary

Alright, so in summary, LERN thinks that you should do a quality assurance interview in two phases, both of these quick, efficient, effective QA meetings. The first one is concurrent that happens during the training. That's when you're checking in with a client and saying, "Is there anything that we see that needs to be fixed?" And if there is, you're getting right on top of that. And then the second one is the post intervention and the post intervention meeting is done after the training, saying, "How did we do? Did we see anything that needs to be fixed? Did we fix it or shall we fix it?" And then also that really important next move into the sales question, which was, "Did we decide how they're going to implement this in the workplace, and did see any other future need for training?" I hope you focus a little bit on quality assurance. It's an important part of the sales and service that we do as contract education professionals.