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Conducting a Business Simulation

The Final Implementation Step

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Introduction to Business Simulation

Have you ever launched a project after copious testing, training, and communications, just to discover that people were not trained as well as expected, gaps in technologies and processes existed, system access or permissions were not granted, or change management was not as effective as planned?

If so, a business simulation will prove invaluable to your organization.

What is a Business Simulation?

- Final dress rehearsal, trial, or dry run prior to the launch of new services, technologies, or processes
- Comprehensive testing and training exercise for employees and key stakeholders
- Integration of a project's technical and functional components, including system functionality and end-to-end processes
- Exercise immediately preceding go-live, once all technologies and processes have been developed, implemented, and trained
- "Walkthrough" of internal processes, including testing the required forms and tools that support service completion

What are the Benefits to Your Organization?

- Replicates the business environment expected to be in place during steady state operations
- Allows you to go live in a safe test environment to identify issues prior to launching
- Guarantees that all work will be completed well in advance of go-live
- Identifies and resolves technology and process gaps and addresses customer service issues
- Prepares employees for new roles
- Provides opportunity to influence key customers and stakeholders, building a support network of advocates and "change agents"

Why Conduct a Business Simulation?

Companies that execute business simulation describe it as an "invaluable approach" that "identifies issues in advance of the launch" and "fully prepares the company for launching their project."

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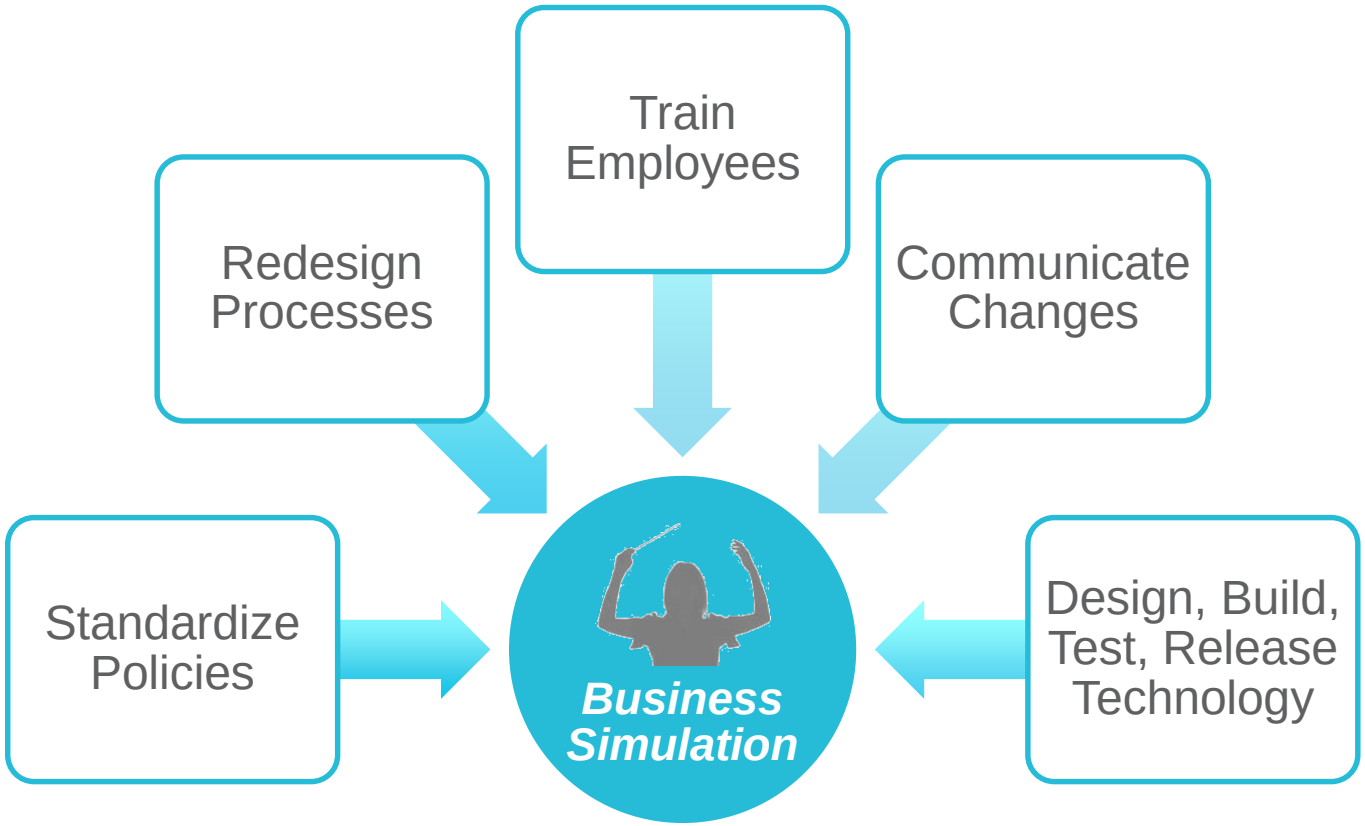
Preparing for the Simulation

Conducting a business simulation is like conducing an orchestra—various moving parts must be planned, directed, and incorporated. Simulation is extremely effective for the implementation of a new service center or the migration of new customer populations or services into an existing service center.



Extensive planning, preparation, and communication ensures a successful business simulation.

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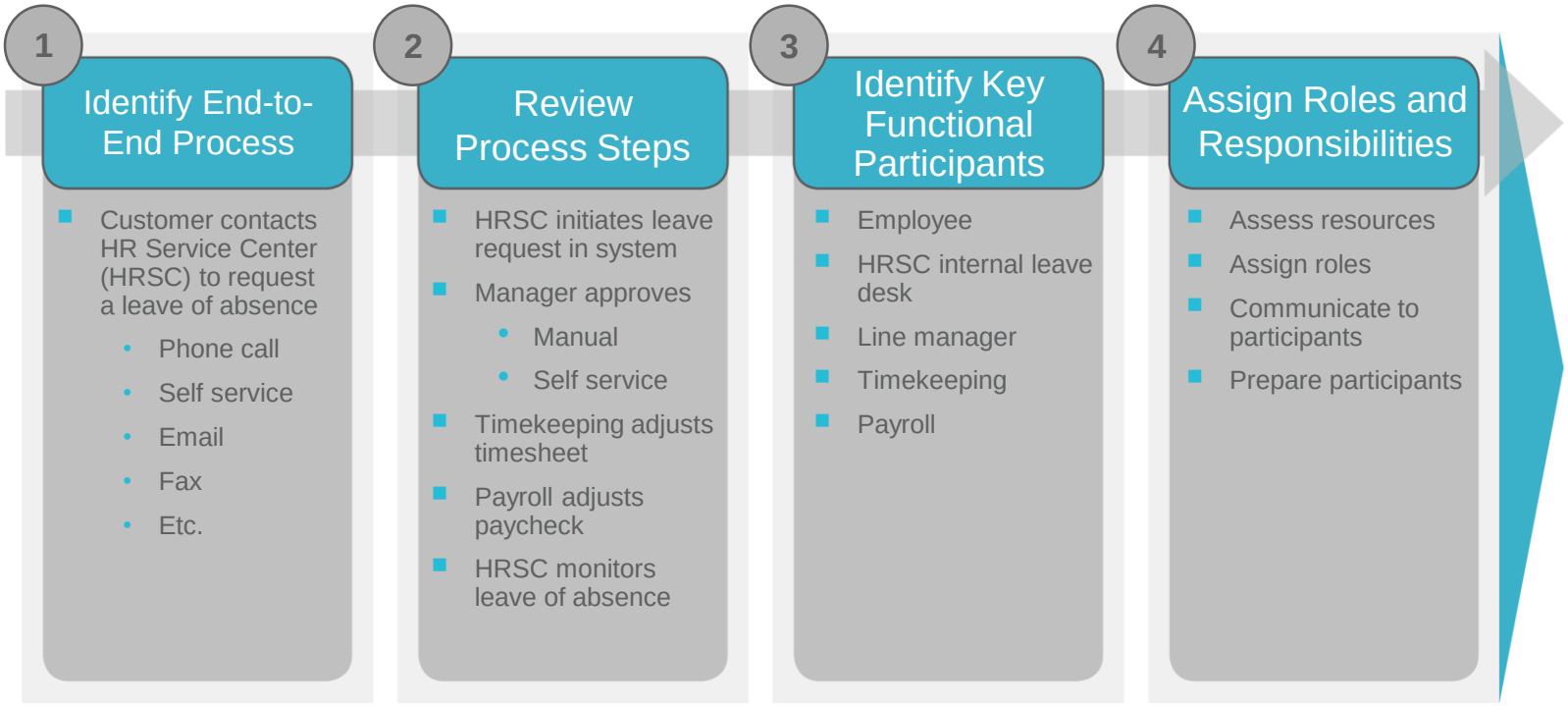
Identifying Participants

Identifying appropriate participants for the business simulation involves careful inspection of all functional groups that touch a process as well as consideration of the entire end-to-end process (see example below).



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Developing the Scenarios

Scenario writing is a team effort requiring cross-functional resources to work together to ensure all elements have been considered during development.

Two Types of Scenarios:

- Policy/process-related questions and answers
  - Requires limited setup
  - Includes questions on policies and system navigation
- Transactional activities
  - Requires setup activities (e.g., data staged in system)
  - Tests a common transaction for a particular application (e.g., employee changes names in self-service application)

Elements to Consider

- Process flows
  - What stakeholders are involved in the process?
- System functionality
  - How does technology support the process?
- Scenario details
  - What is the question and the answer to be provided?
  - What customer demographics should be assigned to a particular scenario?
  - What variations, if any, should be tested?

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Selecting and Preparing Role Players

Mock customers, or role players, are selected to assist with the business simulation. Ideally, employees who will be experiencing the new processes or technologies elect to participate.

Benefits of Using Employees as Role Players

- Involves the future customers of the technology or process
- Teaches employees, in advance, how the technology or process will work
- Allows employees to provide unbiased feedback
- Ensures employees will be invested in the project's success

Preparing Role Players for Business Simulation

- Conduct a preparation session to provide logistical information (e.g., schedule, registration, etc.)
- Set expectations and clearly communicate objectives, which include:
  - Training employees and stakeholders
  - Identifying technical glitches or process gaps
  - Resolving issues
  - Providing learning and continuous improvement opportunities
- Provide questions and pre-scripted answers to role players for use during the simulation to verify answer accuracy
- Provide simulation feedback instructions

It is critical to set clear expectations to help boost confidence in the new technology or process. Positive experiences translate into notable change management achievements!

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Scheduling the Scenarios

Employing a building-block approach allows the customer service representatives to leverage their academic training foundation, while gaining confidence and improving accuracy throughout the exercise. The culmination event is a "stress test" with high volume and demanding customers.

Key:

- Simulation Stress Test
- General Simulation Training
- Academic Training

				Solo handling of all issues/customers under high volume demand conditions
			Solo handling of simple issues with demanding or uninformed customers	Solo handling of complex issues with demanding or uninformed customers
		Solo handling of simple issues with friendly/knowledgeable customers	Solo handling of complex issues with friendly/knowledgeable customers	Small group handling of complex issues with demanding or uninformed customers
	Group walk through of integrated technologies using scenarios	Small group handling of simple issues with friendly/knowledgeable customers	Small group handling of complex issues with friendly/knowledgeable customers	Small group handling of simple issues with demanding or uninformed customers
Academic training on service delivery model	Academic training on technologies	Academic training on processes	Academic training on customer service	Academic and practical training on knowledge base

- Consider schedules and workloads for external stakeholders when planning scenario schedules
- Complete all functional training prior to testing a related scenario
- Monitor employee and management workload throughout the simulation period

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Planning the Logistics

Logistics supporting the business simulation may be complex. Key elements include:

Duration	Set an adequate timeline for simulation (typically two to four weeks)
Technology Requirements	Determine what systems will be required during the simulation. May include HRIS, case management system, knowledgebase, IVR, document management, etc.
Technology Test Environment	Set up test environments for each system included so that scenarios are completed outside of actual production (imperative if a current version of the system is active)
Dedicated Phone/Fax Lines	Use a dedicated fax and phone number for scenarios • It is ideal to use the official phone number for the simulation • If not possible, set up an alternate dedicated phone line
Role Player Registration	Communicate participant registration process, scenario assignments, and scenario distribution
Training	Schedule and conduct participant training on the various technologies and processes covered during the simulation. Include all who need an in-depth understanding (includes stakeholders)
Communications	• Conduct separate logistical sessions for simulation participants by group • Focus on simulation roles and responsibilities, expectations, and feedback • Communicate expectations to leadership

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Providing Feedback

Capturing role-player and participant feedback is crucial to the simulation learning process. Without feedback, the benefit of the simulation is not fully realized.

How will feedback be captured?

- Online survey (completed for every call or transaction conducted)
- Manual evaluation form

What information must be captured?

- Demographic information (CSR, scenario number)
- Accuracy of response
- Customer satisfaction
- Technical performance

How will feedback be analyzed and communicated?

- Evaluate for accuracy
- Analyze trends and address gaps (e.g., spot training)
- Resolve prior to project launch
- Apprise stakeholders of feedback and issue resolution

Feedback is crucial for highlighting training, technology, and process gaps.

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Conducting the Simulation

If planning is well thought out and detailed, the execution of the simulation should go smoothly; however, there is always an opportunity for glitches to occur due to required programming adjustments, process gaps, or incorrect answers in the policy or procedure information that require modification.

- Share lessons learned
- Prepare participants for the day's objectives
- Debrief to report performance metrics and feedback

- Track technical, process, and training issues
- Identify scenarios with incorrect answers, those that were not adequately tested, or those that need adjustments; retest

- Should be conducted throughout the simulation
- Managers/supervisors should provide real time assistance to simulation participants
- Training gaps must be addressed

- May need immediate attention
- Can impact the simulation flow
- Must have a technical representative to resolve issues in real time

The monitoring of scenario flow must also occur real time; communicating adjustments to role players on volume or specific scenarios tested may be required.

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Key Lessons Learned

Keeping in mind a few lessons learned can help ensure the business simulation is successful.

1. Devote the resources needed to plan, prepare, and execute the business simulation	• Work out the kinks prior to project launch • Ensure processes are in in place and functioning well
2. Role players should be future stakeholders across the company	• Employees will be future customers and can become spokespersons and change agents for the project
3. Business simulation provides an important training opportunity	• Allows employees and stakeholders to “test drive” the process prior to going live
4. Address performance expectations during the simulation period with stakeholders	• Simulation is a training exercise and good performance statistics are not the ultimate goal

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