

Services*

- Strategic & Tactical Planning (Company & Departments)
- Organizational Structure and Design
- Orientation & Onboarding
- Job Descriptions
- Job Task Clarity Time Study
- Executive & Leadership Coaching
- 1:1 Check Ins / Stay Interviews
- Individual Development Plans
- Skill Building Workshops
- Succession Planning
- Exit Interviews
- Human Resource Department Audit
- Employee or Supervisor Helpline
- Workflow Process, Procedure, & Training Material Documentation

*Not Inclusive List

Differentiators

- Work Smarter 4-Step Process
- Interim Business Strategist, Talent Manager & Project Implementor
- Change Management Certificate
- Talent Management Certificate
- Performance Improvement Cert.
- Hartman Profile Assessment Cert.
- Facilitation Certification
- Hogan Assessment Certification
- SBA WOSB Certification
- WBENC Certification

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STRENGTHENING COMPANIES FROM WITHIN™

TLC

Improved CSR Job Role Training

About Our Client

TLC Companies® provides transportation-specific expertise and services to help trucking companies improve operations and save money. TLC has been in business since 1985 and understands the trucking industry's ins and outs. They handle everything from payroll, taxes, benefits, and workers comp, assisting with driver training, government compliance, and much more. TLC is the only Professional Employer Organization (PEO) in the United States dedicated solely to the trucking and transportation industry. They are also the most trusted PEO, serving over 500 clients of all sizes.

Project Overview

TLC was growing and knew they needed further support documenting job tasks and creating training tools for the candidate screening job role (CSR). While TLC had some job task documentation, it was outdated and required more in-depth development. Since TLC did not have the resources to develop further the materials to train new CSRs quickly, Success Trek stepped in to update the existing materials. Initially, we utilized a work session strategy to better understand the job role and tasks before fully building a plan to finalize a more robust training guide.

Their Challenges

While TLC had some job task documentation, a deeper dive revealed:

- Instructions did not follow the current workflow to do the CSR tasks productively, leading to confusion when training new CSRs.
- Due to recent internal technology changes, specific job task instructions were outdated or missing.
- Accessibility within TLC's in-house technology platform was limited, and information on how to do the job was difficult to find.

Our Actions

Success Trek utilized our work session process to help clarify how to use the client's current training information and identify the missing tools and resources. We identified the following needs to create an updated digital training guide:

- Alignment of the job task instructions with expectations of how the CSR completes them.
- Addition of missing instructions.
- Updating due to internal technology changes.
- Organization of digital instructions for easier searching and access by all CSRs.

“Theresa's process of reviewing a project and determining best solutions is quite magical to behold. Her wheels are TURNING! She is so knowledgeable and quick to understand the needs and goals of her clients. Her insight and guidance throughout the project were so beneficial in helping us to reach our end goal. I would absolutely recommend her to any company looking to level up and create streamlined, comprehensive processes and training guides. My team and I worked closely with Mary Andersen to create and establish a fresh, comprehensive training guide. Mary was an absolute GEM to work with. Her expertise was a huge benefit as we navigated through the process. Her level of patience and desire to ensure that the final product 100% met expectations was so appreciated. Without a doubt she is the not-so-secret weapon for Success-Trek.” – **Stacey Gibson, Operations Manager**

Collaborative Results

The work improved business operations through a strengthened workflow process and empowered leaders and teams. Moreover, there has been a dramatic reduction in the time to train new CSRs. The Operations Manager and CSR Supervisor have reported that CSRs who tested the training guide and new CSRs using it for training have shared positive feedback, including the following.

- New CSRs learn the job tasks quicker and are less frustrated during training.
- The navigation feature within the document allows for quicker information finding.
- Screenshots (while often quickly outdated due to technological changes) are still beneficial as they provide a starting point.
- One-on-one training is decreasing due to the ease of finding information to do the job.

Why The Client Chose Success Trek

The Operations Manager, Stacey Gibson, learned Success Trek could help through a mutual colleague. After a 30-minute complimentary conversation, Stacey quickly learned how Success Trek helped other clients document job tasks, create training tools and materials, and how that process could help her with theirs. Since there were still many unknowns about the best approach to gather and organize their information, Stacey appreciated the 6-Session Package – the smaller initial investment helped her build rapport and gain confidence that we could do the job, and she could easily see the value of the investment.

Ready (or not) to take action?

Request a FREE 30-minute Video Chat Session. If you are unsure if Success Trek can help, work within your budget, or not sure what the problem is, this video chat session is a good fit for you.

In just 30 minutes, we:

- Get an opportunity to get to know one another
- Gain a better understanding of your needs or concerns
- Discuss ways Success Trek can help and next steps to consider
- Determine if it makes sense to work together

How To Get Started

1. Go to www.Success-Trek.com/TakeAction
2. Enter your contact information
3. Answer a few questions