

Practice & Preparation for IDE 712 FEA paper

For my **Project Title** and **Authors and Contributors**, I co-authored the final project report titled "IDE 712: Front-End Performance Analysis of Escalation Behavior in a Contact Center". I collaborated on this comprehensive front-end analysis alongside my team members Gregory P. Tidwell, Greg Vasquez, and Billy Scott Jr. for our IDE 712 course under the instruction of Dr. Pusch.

In the **Context of the project work**, our team investigated a significant performance problem at Alorica El Paso East, a high-volume inbound contact center supporting a major telecommunications client. We identified that Tier-1 agents were escalating 37 percent of routine calls to supervisors, despite being trained and authorized to resolve them independently, which created a 22-percentage-point gap from the organizational target of 15 percent. To understand this issue, we applied the Human Performance Technology (HPT) systems approach, conducting a gap analysis and utilizing Gilbert's Behavior Engineering Model (BEM) to systematically diagnose the root causes. Our findings revealed that the escalation behavior was not driven by a lack of knowledge or skill; rather, it was reinforced by environmental conditions, conflicting performance incentives, workflow friction, system complexity, and the perceived risk of making incorrect decisions. To address these root causes, we proposed a systemic solution set that included metric redesign, AI-supported decision assistance, coaching realignment, and scenario-based simulations.

Regarding the **Description of which phase(s) of IDD&E this product represents**, this report serves as a robust example of the **Analysis** phase of instructional systems design, specifically focusing on Front-End Analysis (FEA) and Performance Analysis. Rather than jumping straight to an instructional intervention, this phase required us to thoroughly analyze the environmental and behavioral factors impacting human performance before designing a solution. By systematically evaluating the contact center's workflow, environment, and performance incentives, this project demonstrates the critical process of determining whether a training solution, a non-instructional performance intervention, or a combination of both is actually required to solve a complex business problem.

In my **Short reflection and self-assessment of the product**, conducting this front-end analysis reinforced a critical lesson for me: "more training" is not always the answer to poor performance. This project proved that even if employees possess the correct knowledge and skills, systemic friction, complex tools, and misaligned incentives will continue to drive incorrect behaviors, such as unnecessary call escalations. By applying Gilbert's Behavior Engineering Model, I learned how to isolate environmental root causes and design targeted, systemic solutions like metric redesigns and AI-supported decision assistance rather than defaulting to standard training modules. Ultimately, this project fortified my analytical skills as a performance consultant, ensuring that any future instructional design work I undertake is anchored in solving the correct underlying organizational problem.