

**Needs Assessment Report: Prodigy Commercial HVAC**

Jessica A. Fisher

Department of Technical Communication, University of North Texas

Dr. Samantha Cosgrove

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## **Needs Assessment Report: Prodigy Commercial HVAC**

### **Introduction**

The Operations Manager for Prodigy Commercial Heating, Ventilation, and Air Conditioning (HVAC) (Prodigy) discovered the company on average is overpaying technicians \$1.2 million dollars annually. This extra expenditure occurs during the time sheet submittal process. Dispatchers must compare a technicians' travel time via the truck's GPS against hours the technician manually inputs into the time sheet system. If the dispatchers do not find and correct any discrepancies found during this stage, an overpayment results.

The importance and urgency of this issue is to eliminate time theft and the extra expenditure for the company immediately.

### **Methods**

For the needs, task, and learner analyses, interviews with the Operations Manager and a dispatcher were conducted. Additionally, a brief job shadow of a dispatcher was conducted to receive results and give recommendations.

### **Results**

A summary of the major findings for each analysis is outlined below.

#### **Needs Analysis**

When speaking in person with the Operations Manager, he explained the problem being that dispatchers are failing to catch inconsistencies between technicians' GPS-logged hours and manually recorded work hours.

Solutions to this problem include creating job aids (e.g., flowcharts, videos, and step-by-step instructions) and a clearer set of expectations for the dispatchers.

#### **Task Analysis**

When speaking in person with the Operations Manager, he described the three objectives of learning that the dispatchers should know after implementing the solutions include understanding how their role directly impacts the company, catching inconsistencies between technicians' GPS-logged hours and manually recorded work hours, and recognizing the importance of accountability by understanding expectations.

#### **Learner Analysis**

When speaking in person with the dispatcher, it became clear that the motivational differences between some dispatchers, including age, experience, and personal investment, could be the ultimate reason for time theft and Prodigy's extra expenditure.

## Recommendations

### Deliverables

According to Peck, 2025, 68% of employees prefer to learn or train in the workplace, which is why incorporating job aid materials and accountability, in conjunction with in-person training, will be essential and effective for dispatchers.

To implement the desired change, the following solutions are recommended:

- Flowcharts
- Videos
- Step-by-step instructions
- Accountability

Flowcharts will be an effective resource for dispatchers to show them the lifecycle of receiving a paycheck and how their role directly impacts that process.

According to Peck's 2025 research, 59% of employees think training directly improves their performance. Videos that demonstrate the process of comparing logged hours and recorded hours will serve as effective reminders to reinforce their onboarding training.

Step-by-step instructions are quick, usable resources for verifying information or reviewing steps from training or videos. As Knight, 2023 explained, breaking down tasks into 15-minute increments helps learners stay organized and focused. Dividing instructions by task and utilizing templates or auto-fill features can create this ease.

Accountability means setting clear expectations for dispatchers to follow. To do this, first review Prodigy's guidelines, next create training, and then create job aids to encourage knowledge retention because according to "Why is Accountability Important in the Workplace?," 2020, when employees know who is responsible for what, it eliminates confusion and allows individuals to meet clearly defined expectations.

### Objectives

When speaking in person with the Operations Manager, he noted three learning objectives he needed the dispatchers to learn in the office after implementing the solutions.

- Understand how their role directly impacts the company.
- Know how to catch inconsistencies between technicians' GPS-logged hours and manually recorded work hours.
- Recognize the importance of accountability by understanding expectations.

## Motivational Alignment

When speaking in person with the target audience, dispatchers, the similarity and differences among the thirteen dispatchers at Prodigy became clear.

The single similarity is that most of the dispatchers view the task of comparing logged and recorded work hours as ‘busy work’ and a burden, having no impact on the company.

The multiple differences between dispatchers are outlined below.

- The age range of the dispatchers can vary from 18 years old to 60 years old.
- The HVAC experience level of dispatchers can vary from no experience to over 20 years of experience.
- Some dispatchers view their role as a ‘job’ while others view their role as a ‘career.’

Shadowing one dispatcher in person gave clarity on all dispatchers’ motivation: some are there for a job and others are there for a career. This motivational difference could be a big factor in the extra expenditure. From an instructional approach, creating resources and showcasing the impact each person’s role has will be vital for success.

## Conclusion

When speaking in person with the Operations Manager for Prodigy, he explained the problem being that dispatchers are failing to catch inconsistencies between logged hours and manually recorded hours, resulting in time theft and an extra expenditure of \$1.2 million dollars annually being given to technicians.

Based on the solutions recommended for producing job aids (i.e., flow charts, videos, and step-by-step instructions) and creating clearer expectations, he wanted the dispatchers to learn three objectives.

- Understand how their role directly impacts the company.
- Know how to catch inconsistencies between technicians’ GPS-logged hours and manually recorded work hours.
- Recognize the importance of accountability by understanding expectations.

After speaking in person with the dispatcher, the age range, HVAC experience level, and personal investment misalignment were motivational differences that could be the ultimate factor in the extra expenditure.

The major limitations the Operations Manager may face in implementing the suggested solutions would be finding time in the dispatchers’ busy schedules for them to digest the deliverables. Additionally, creating motivation could be a challenge if dispatchers are unwilling.

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