

Petter Selenius

Co-defining Roles and Responsibilities for Interaction in a Business Environment

Helsinki Metropolia University of Applied Sciences

Master's Degree

Industrial Management

Master's Thesis

2 May 2019

What a year it has been, unusually hectic but very rewarding at the same time. A year or so ago, when hesitating if I would apply to this Metropolia program or not, I asked myself the following question: “If not now, then when?”. After that, the decision was easy. Turned out to be the right decision as well...

It wouldn't have been possible for me to attend any studies in the first place without the support given by the company in terms of time and flexibility. For that I am truly thankful. The team members in the case department are as good as it gets. Sofia, Kirsi, Isabel, Robin, Antti, Metin, Ilari, Zheliang, Francisco and Teemu. Thank you all for your support, input and patience.

Furthermore, I would like to thank Metropolia and their wonderfully skilled staff, more specifically Thomas Rohweder and Zinaida Grabovskaia, who both have helped me immensely throughout this intense year.

A considerable portion of my free time during the year has been spent in front of a computer, either writing or reading. Thus, a special thanks to my wife Tanja for showing support and reminding me to focus.

Petter Selenius

Helsinki, 2 May 2019

Author Title	Petter Selenius Co-defining Roles and Responsibilities for Interaction in a Business Environment
Number of Pages Date	59 pages + 1 appendix
Degree	Master of Engineering
Degree Programme	Industrial Management
Instructors	Dr. Thomas Rohweder, Principal Lecturer Zinaida Grabovskaia, PhL, Senior Lecturer
<p>This Thesis focuses on co-defining the roles and responsibilities for interaction in a business environment. In the case department, there are 3 stakeholders and the interplay between them leaves room for improvement. By aligning and co-defining the roles and responsibilities for interaction, the internal functions of the case department could be made more efficient.</p> <p>In this study, the Design research approach and a mix of qualitative and quantitative research methods were used due to the complex and specific features of the research problem. The research design of this Thesis consisted of four steps. First, a literature review was done after which the current state analysis was done using a tool from the literature as a second step. The third step was done collectively which yielded a co-defined initial proposal which was fortified by concepts for improving interaction also from the literature search. The initial proposal was assessed and validated in the fourth and final step. The data was collected by workshops with the relevant stakeholders and their common manager present.</p> <p>This study showed that the stakeholders did have differences in how they see the roles of the other stakeholder in the daily tasks of the department. The most unclear role seemed to be the Sales Manager's role. Based on the conceptual framework developed from the literature review, the aligned roles and responsibilities for interaction and the co-defined proposal for improving interaction were defined for the case department.</p> <p>By implementing the co-created proposal for improving interaction in the case department, the misalignment due to inefficient or misunderstood interaction between stakeholders, other departments and customers is mitigated, thus making the department's interactions more effective. Implementation of the co-created proposal for improving interaction began shortly after the completion of this study.</p>	
Keywords	RASCI, Interaction, Communication guidelines, Ground rules, Team charter

Contents

Preface

Abstract

List of Tables

1	Introduction	1
1.1	Business Context	1
1.2	Business Challenge, Objective and Outcome	2
1.3	Thesis Outline	2
2	Method and Material	4
2.1	Research Approach	4
2.2	Research Design	5
2.3	Data Collection and Analysis	7
3	Defining Roles and Responsibilities for Interaction Based on Relevant Literature	10
3.1	Tools for Defining Roles and Responsibilities for Interaction	10
3.2	RASCI Responsibility Matrix	11
3.3	Concepts for Improving Multi-disciplinary Interaction	14
3.3.1	Communication Guidelines	14
3.3.2	Ground Rules	17
3.3.3	Team Charter	19
3.4	Conceptual Framework	22
4	Current State Analysis of the Existing Roles and Responsibilities for Interaction Within Case Department	26
4.1	Overview of the Current State Analysis Stage	26
4.2	Workshop 1: Creating the List of Tasks (Finding of Data Collection 1)	26
4.3	Workshop 2: Interactive RASCI (Finding of Data Collection 1)	28
4.4	Analysis of the Current Roles and Responsibilities for Interaction Within Case Department	30
4.4.1	Strength and Weaknesses in the Current Roles and Responsibilities for Interaction	34
4.5	Key Findings from the Current State Analysis	35
5	Co-defining of Proposal for Improving Roles and Responsibilities for Interaction in the Case Department	37
5.1	Overview of the Proposal Building Stage	37

5.2	Workshop 3: Iterative RASCI Matrix (Finding of Data Collection 2)	37
5.3	Workshop 4: Introducing Concepts for Improving Multi-Disciplinary Interaction (Finding of Data Collection 2)	40
5.4	Proposal Draft	43
6	Validation of the Proposal for the Roles and Responsibilities for Interaction in the Case Department	44
6.1	Overview of the Validation Stage	44
6.2	Feedback Received and Further Development (Findings of Data Collection 3)	44
6.2.1	Further Developments to the RASCI Matrix and Its Final Proposal	45
6.2.2	Further Developments to the Communication Guidelines and Its Final Proposal	48
6.2.3	Further Developments to the Ground Rules and Its Final Proposal	49
6.3	Recommendations for Immediate Next Steps toward Implementation	50
7	Conclusions	52
7.1	Executive Summary	52
7.2	Managerial Implications	53
7.3	Thesis Evaluation	54
7.4	Closing Words	57
	References	58
	Appendix 1. Team Charter Template	

List of Tables

Table 1:	Details of interviews, workshops and discussions in Data 1.....	7
Table 2:	Details of interviews, workshops and discussions in Data 2.....	8
Table 3:	Details of interview and discussion in Data 3.....	9
Table 4:	List of tasks.....	28
Table 5:	Color code used in highlighting differences.....	30
Table 6:	Current state of roles and responsibilities for interaction in the case department.....	31
Table 7:	Current state of roles and responsibilities for interaction in the case organization (with the problem areas highlighted).....	33
Table 8:	Self-assessed strengths and weaknesses.....	34
Table 9:	Summary of findings from the current view on roles and responsibilities for interaction.....	35
Table 10:	Initial proposal from iterative RASCI exercise.....	38
Table 11:	Color coding of the proposed iterative RASCI table.....	39
Table 12:	RASCI matrix developments in the validation stage.....	46
Table 13:	RASCI Matrix, final proposal.....	47

1 Introduction

Industrial leaders place special attention on how to increase synergy within and between their teams and departments in their global organizations. Business practice shows that smooth collaboration lead to excellent outcomes, feeling of achievement and in the end competitive advantage.

This Thesis investigates the topic of improving communication between internal stakeholders of a department as a means to increase collaboration in the case company. More specifically, this Thesis focuses on defining the roles and responsibilities for interaction between internal stakeholders in the Sales organization of the case company.

1.1 Business Context

The case company of this Thesis is a multinational company operating in the fire protection industry. The company headquarters are located in Vantaa, close to Helsinki, while the production facilities are located in Kerava, 15 km from the headquarters.

The company develops, manufactures and sells its own fire protection systems globally, both to projects on land and on sea. Sales on land are handled by a department through 3rd party business partners or locally by the subsidiaries of the case company, depending on in which country the project is executed. Marine sales are handled by a separate department in the headquarters. This thesis will focus on the main stakeholders within the department handling the 3rd party partners in land sales.

The main market verticals in the land business includes various industrial applications, commercial buildings and large data centers. Day to day tasks of the sales department involve multiple internal stakeholders working together to serve everything from external key accounts to one-off prospects either directly or via 3rd party partners.

The Sales department consists of three main types of stakeholders with different work descriptions. Currently, the interaction of the stakeholders in the sales process is ad hoc where little to no clear processes for interaction are defined. As such, this creates an internal inefficiency within the department. The Sales departments tend to be increasingly more cross-functional than isolated departments (Storbacka et.al 2009: 903). This paired with an existing internal inefficiency leaves even less room for actual sales activities.

1.2 Business Challenge, Objective and Outcome

The department in this Thesis deals with sales to 3rd party partners for projects on land. The main internal stakeholders in the department are: Sales Managers, Key Account Managers and Sales Engineers. The Sales Managers have sales responsibilities and work closely with the dedicated 3rd party partners to maintain and develop the business in their assigned countries or sales areas. The Key Account Managers maintain a relationship with identified key accounts (effectively the end-customers of the 3rd party partners) and develop the business with a focus on the vertical they are assigned to. The Sales Engineers support the other internal stakeholders and the 3rd party partners directly with technical matters regarding the technology.

Even though the roles of the separate stakeholders seem to be divided, the roles and responsibilities for *interaction* between these stakeholders are not as clear. There are little or no *defined* processes in project work on who actually handles what, and what is expected from one stakeholder by the other two.

Accordingly, the objective of this thesis is to *clarify and co-define the roles and responsibilities for interaction between the three internal stakeholders in the context of end-customer interface*.

The outcome of this thesis is a *set of tasks and processes where roles and responsibilities for interaction are clarified and defined*.

1.3 Thesis Outline

The scope of this Thesis is the Sales department for activities on land and interaction of the key stakeholders a) internally, b) towards the customers, c) towards the rest of the company.

This Thesis includes 7 sections. Section 1 introduces the case company and the department as well as the business challenge, objective, outcome and scope of the thesis. Section 2 describes the methods and materials used to reach the objectives and outcome. Section 3 introduces tools used for reaching the outcome and creates the conceptual framework of this thesis. In section 4, the current roles and responsibilities for interaction within the case department is analysed based on the tools given by section

3. The clarifying and co-creation of the roles and responsibilities for interaction is analysed in section 5. In section 6, the initial proposal is presented to the manager. Feedback is gathered and used to improve and tune the initial proposal. Finally, section 7 summarizes and evaluates the thesis.

2 Method and Material

This section describes the methods and material used to reach the outcome. The research approach and research design are introduced in the first two chapters. How data was collected and recorded is explained in the third and final sub-section.

2.1 Research Approach

A research approach can be defined as the underlying fundamental reasons for the methods and methodology of conducting a research (Johnston 2014: 208). Examples on research approaches for business studies are Case study, Action research and Design research (Kananen 2013: 37-47). The case research methodology involves understanding a phenomenon holistically by adequate and careful analysis of documentation (Kananen 2013: 38-39). After the documentation phase is done, conclusions and generalizations can be drawn based on the gathered material. The aim for the Action research is a change where the researcher is involved. It can be seen as a cyclical process where an action is planned, carried out, evaluated and followed-up (Kananen 2013: 41-42). Whereas the main purpose of the Case study was to understand a phenomenon as a whole, the Action research approach wants to apply and evaluate a change in a cyclical process.

Design research is somewhat similar to Action research as both are used for changing or improving the topic that was in focus of the research, however, Design research does not have a cyclical approach as the Action research must have (Kananen 2013:44-46). In Design research there are four phases; Literature, Current State Analysis, Initial Proposal and Validation. The Literature phase to understand the topic at hand, the Current State Analysis to set the basepoint, Initial Proposal based on the Literature to implement the change and the Validation phase to validate the change. The result of a Design research cannot always be generalized as the topic can concern an isolated event. However, the concept that was used to reach the improved results should be documented and can then be applied to other cases (Kananen 2014:47).

The research approach selected for this Thesis is Design research. The methods of conducting the study and development work will be with a set of approaches which will be formulated in the conceptual framework of this Thesis. By using the selected approach, the strengths and weaknesses of the current roles and responsibilities for interaction are

identified. As this thesis focuses on defining the roles and responsibilities for interaction between stakeholders, it will be mostly use qualitative research. According to Miles and Huberman (1994):

...Another feature of qualitative data is their richness and holism, with strong potential for revealing complexity; such data provide “thick descriptions” that are vivid, nested in real context... we can go far beyond “snapshots” of “what?” or “how many?” to just how and why things happen as they do... (Miles and Huberman 1994: 10).

Qualitative, as opposed to quantitative, strategy for data collection and analysis gives more complex information that can be used to understand a phenomenon that is not measured by numbers. As the objective of this thesis is revolving around the roles and responsibilities for interaction between stakeholders, a research strategy based mostly on qualitative data makes most sense for this type of study.

2.2 Research Design

The research design is a construct that illustrates the logic and phases needed to reach the outcome. In this study, research design consists of four stages which are presented in Figure 1 below.

The first phase consists of finding approaches from the existing knowledge to systematically define the roles and responsibilities for interaction. The objective of this phase is to find suitable approaches which are then used and implemented in the future phases. These approaches form the conceptual framework of this thesis.

In the second phase, the analysis of the current interaction between the stakeholders is conducted with the help of the approach from the first phase. The goal is to find the strengths and weaknesses of the current situation and to have a description of the current roles and responsibilities for interaction.

The third phase consists of the stakeholders co-defining the initial proposal for the roles and responsibilities for interaction by using the approach from the first phase. The outcome would be an initial definition of the roles and responsibilities for interaction. Figure 1 below shows the research design for this study.

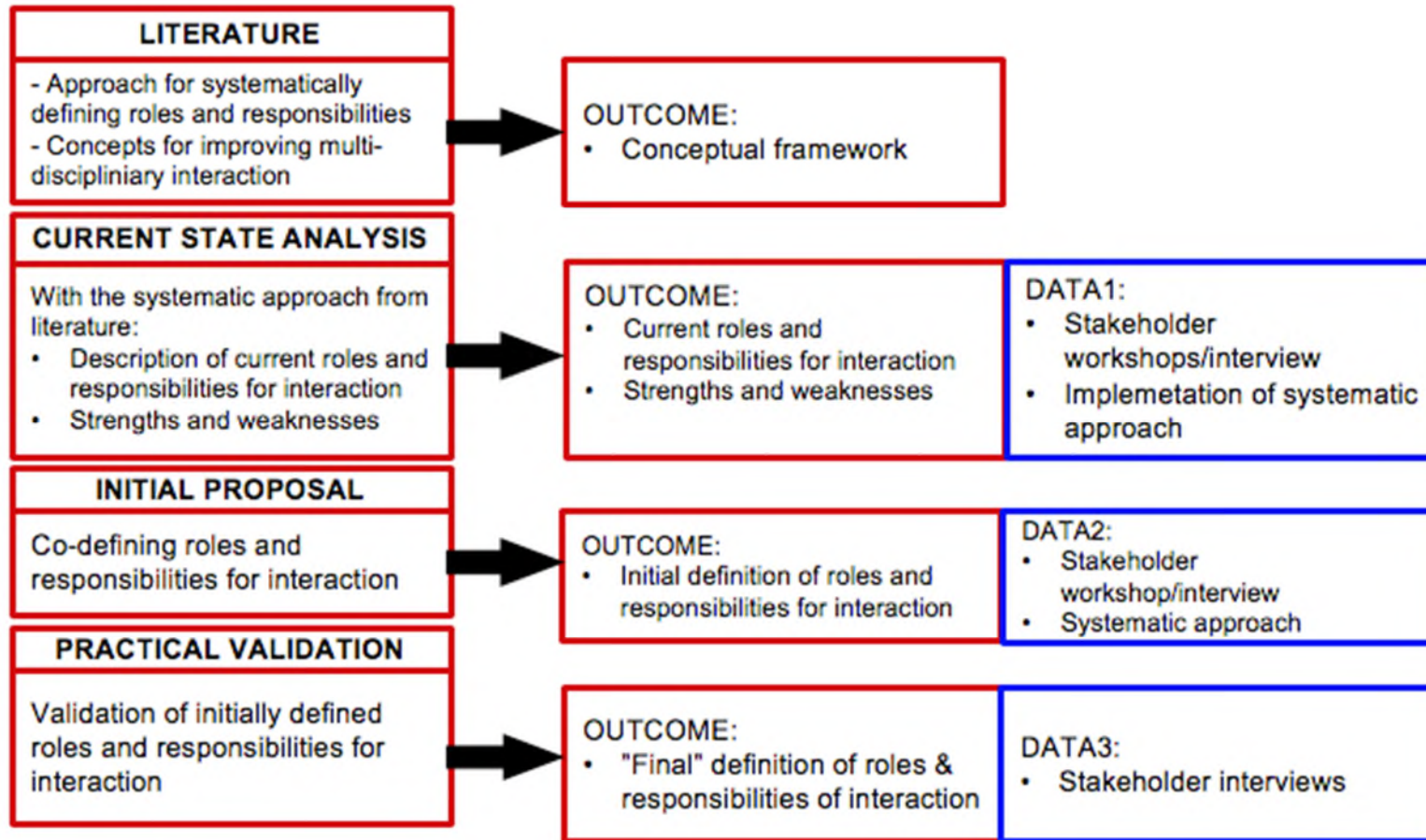


Figure 1. Research design of this study.

As seen from Figure 1, the fourth and final phase the initial definition of the roles and responsibilities for interaction are revised by the common manager of the stakeholders. The goal is to have a revised set of defined roles and responsibilities for interaction between the stakeholders. This set of defined roles and responsibilities is formulated for taken into use. The scope of this thesis does not extend to measure whether or not the newly defined roles and responsibilities for interaction are followed, or if they have made any change in the outcome of the department. The fact that the roles and responsibilities for interaction are documented is an improvement from the initial state.

2.3 Data Collection and Analysis

The data for this study is collected via three rounds of data collection and analysis: Data 1, Data 2 and Data 3.

Table 1. Details of interviews, workshops and discussions in Data 1.

	Participants / role	Data type	Topic, description	Date	Documented as
Data 1, Current State Analysis (Section 4)					
1	Stakeholder 1: Manager	Workshop 1 Workshop 2	Current state of roles and responsibilities for interaction Strengths and weaknesses of the current interaction	March 2019,	Task list, RASCI-Matrices
2	Stakeholder 2: Sales Manager 1				
3	Stakeholder 3: Sales Manager 2				
4	Stakeholder 4: Sales Manager 3				
5	Stakeholder 5: Key Account Manager 1				
6	Stakeholder 6: Technical Manager				
7	Stakeholder 7: Sales Engineer				
8	Stakeholder 8: Sales Engineer				
9	Stakeholder 9: Key Account Manager 2	Conference calls, e-mail communication		March 2019	Task list, RASCI Matrix
10	Stakeholder 10: Sales Manager 4	Conference calls, e-mail communication		March 2019	Task list, RASCI Matrix

As seen from Table 1, the three rounds of data collection and analysis correspond to the different phases in the research design, as seen in Figure 1 in Section 2.2 above.

As seen from Table 1, Data 1 comprises different data sources done for the current state analysis. Data 1 collection was done in two workshops with all but two stakeholders present. The workshops were held on the company premises. Information regarding the tools, topics and workshop objectives were given in advance to the stakeholders. Separate data collection points were done for the two stakeholders that were abroad.

In the second stage, Data 2 collection was conducted by co-creating the initial proposal with the stakeholders based on results from the current state analysis. Table 2 shows the details of Data 2 collection.

Table 2. Details of interviews, workshops and discussions in Data 2.

	Participants / role	Data type	Topic, description	Date	Documented as
Data 2, Initial Proposal (Section 5)					
1	Stakeholder 2: Sales Manager 1	Workshop 3	Co-creation of initial proposal for the roles and responsibilities for interaction	March-April 2019	RASCI matrix, concepts for improving communication
2	Stakeholder 3: Sales Manager 2				
3	Stakeholder 4: Sales Manager 3				
4	Stakeholder 5: Key Account Manager 1				
5	Stakeholder 6: Technical Manager				
6	Stakeholder 7: Sales Engineer				
7	Stakeholder 8: Sales Engineer				
8	Stakeholder 9: Key Account Manager 2	Conference call, e-mail communication	April 2019		
9	Stakeholder 10: Sales Manager 4	Conference call, e-mail communication	April 2019		

As seen from Table 2, Workshop 3 for Data 2 was conducted in a similar way as was Workshop 1 and 2. Stakeholder 1, Manager was not present, so the initial proposal could

be re-defined and/or validated in the last phase. The manager excluded, all the other stakeholders were the same as in Data 1. Workshop 3 was held in two separate occasions as close to each other as possible as the initial time allocated was not enough. The workshop was held in company premises. The separate conference calls and communication with two stakeholders was conducted as a semi-structured conference call with a shared screen. The approach from Workshop 2 was modified to work with the changed environment.

Finally, Data 3 collection relates to the validation of the co-creating the initial proposal.

Table 3. Details of interview and discussion in Data 3.

	Participant / role	Data type	Topic, description	Date	Documented as
Data 3, Validation (Section 5)					
1	Stakeholder 1: Manager	Interview, Feedback	Validation of initial proposal	April 2019	Notes and updated/validated initial proposals

As seen from Table 3, the validation of the initial proposal was done with a face to face interview with the manager who is common for all stakeholders. The initial proposal was presented and discussed. Direct feedback was documented, and the initial proposals were changed and updated, thus creating a validated version.

The data from the current state analysis containing the current state of the roles and responsibilities for interaction and the strengths and weaknesses of the current situation. The findings from the current state analysis is discussed in Section 4. Next, Section 3 discusses the tools that could be used for conducting this study and ends in a conceptual framework.

3 Defining Roles and Responsibilities for Interaction Based on Relevant Literature

This section discusses the approached and tools for defining roles and responsibilities for interaction for the relevant stakeholders and focuses on synthesizing the approach for use in the following chapters of this thesis. Section 3.3 introduces common concepts for improving multi-disciplinary interaction. The chapter ends with presenting and discussing the conceptual framework of this study.

3.1 Tools for Defining Roles and Responsibilities for Interaction

There are a number of approaches to define roles and responsibilities. This thesis briefly discusses some of these approaches and gives justified reasons as to why most of the approaches are not immediately applicable for achieving the objective of this study. Then, the focus is given to the chosen approach.

The definition of *interaction* by Merriam-Webster (2019a) is mutual action or influence. The mutual aspect shows that there are two or more parties involved and all are influenced by the actions of each other. This influence can either be destructive, neutral or constructive, depending on how the interaction is perceived by each party taking part in the interaction.

The definition of *a process*, if simplified, is an action that requires a number of activities to be done before the action is completed (Holt 2009:4). A business process is thus an action related to business. Each separate action of a process has an assigned stakeholder. A stakeholder is a role in an organization and not a person. A person can have different stakeholder roles in an organization and a stakeholder might have multiple people assigned to it. According to Holt (2009:3), an organization can perform a multitude of business processes or other types of processes on a daily basis. Modelling the processes is an important aspect to manage and control all the ongoing activities of the organization.

From a process-based perspective, if applied to interaction, business process modelling, for example, cannot be considered as the most suitable tool since it focuses more on the process rather than on the interaction between the relevant stakeholders. Arguably, map-

ping out the sales process in detail while assigning and clarifying the roles of each stakeholder might prove beneficial. However, the focus of this thesis is not on the sales process itself but on improving interaction between the relevant stakeholders.

Likewise, a SWOT analysis is a strategic tool used for listing the strengths and weaknesses of an organization and turning the major strengths into value by coupling them to the identified opportunities and taking into account the threats. SWOT is an abbreviation from Strengths – Weaknesses – Opportunities – Threats. (Coman & Ronen 2009:1) In this study, the strengths and weaknesses of the interaction in the case department could have been analysed by a SWOT analysis and resulted in a list of strengths and weaknesses in interaction between the stakeholders of the department. However, as this alone would not have been enough for defining the actual roles and areas of responsibilities for interaction. The roles still would need to be mapped, defined and clarified by using a separate approach. Therefore, a more suitable approach for defining the roles and responsibilities for interaction was found to be the one discussed below.

3.2 RASCI Responsibility Matrix

A RASCI responsibility matrix is, as the name suggests, a matrix where the rows are identified by the tasks or processes and all the related stakeholders are described in the columns. As shown below as presented by Cadle et al. (2014), RASCI is an acronym for:

- R (Responsible):
The stakeholder that is assigned to perform a task or who does the work.
- A (Accountable):
The ultimately liable stakeholder. Approves the work.
- S (Supportive):
The stakeholder with a supportive role within the task if needed.
- C (Consulting):
Stakeholders that provide information for the task if needed
- I (Informed):
Stakeholder that is informed about the end result if needed.

According to Augustine and Cooper (2009:45), in addition to the five roles presented above, there could also be a sixth role which is not abbreviated is a “no formal role”. In

essence, a stakeholder without an active role in a task. This can be marked in the matrix as a blank cell.

Based on the views of Solomon (2015:6), the roles can also be combined. A combination consisting of "A/R" means that the stakeholder does the work and also makes the decision of going forward or not. A combination of "A/C" is a stakeholder that is consulted and who also makes the decision. A "C/I" role is a stakeholder that can give input and support based on their expertise. After the task is completed, they can be informed on the result. There is however no obligation to follow the advice given by the consulted party (Solomon 2015:7). Roles can also have more than two combinations. However, this could be a sign of that the task is too general. The roles can also be put in brackets. A (C) would imply that this stakeholder can be consulted but it is by no means mandatory or necessary.

According to Cadle et al. (2014:107), the matrix is completed using a four-step approach. First, the key tasks of the stakeholders are identified and described in detail for clarity. It is recommended to use an active verb to describe the task for an even clearer view of the task. These tasks are then recorded in the first column. In the second step, all the relevant stakeholders are identified and allocated each one to a column. The third step is then going through each task in turn and allocate the appropriate RASCI role for each relevant stakeholder. The fourth and final step analyses the RASCI matrix. When completed, a RASCI chart should give a clear view on which stakeholders are involved in a specific task, what they expect from each other and how they need to communicate and collaborate (Cadle et.al 2014).

Augustine and Cooper (2009) introduces an approach, where the roles and responsibilities could also be divided in a more interactive way using a RASCI responsibility matrix. First, the matrix would be filled by each stakeholder separately. This would show on their reflection and view of the current state of the tasks examined. The differences would then be noted, analysed and resolved by an iterative approach using the same RASCI chart so that all stakeholders would have a clear view on their role in the tasks at hand.

If summarized, based on the description by Morgan (2008), analysis of a RASCI occurs by analysing it vertically and horizontally within the matrix for each task. The number of different roles assigned per task is noted and analysed, as shown in the guidelines seen from Figure 2.

Vertical Analysis: Stakeholders Involvement in Tasks		Horizontal Analysis: Tasks Based on Assigned Roles	
Phenomenon	Implication	Phenomenon	Implication
Many R's	Can the stakeholder handle this many tasks and responsibilities?	No R's	Who is doing the job if no one is assigned? Are there too many consulted or informed parties?
No empty spaces	Does the stakeholder need to be a part of all tasks? Can the involvement be reduced to Informed?	Too many R's	May be a sign of silo mentality
No A's or R's	Should this role be eliminated or should processes be changed to involve the role and reallocate resources?	No A's	A stakeholder must be accountable and be able to have a Yes/No mandate
Many A's	Does a segregation of duties exist? Should other stakeholders be accountable for some tasks? A signal of a bottleneck.	Too many A's	Can create confusion as each stakeholder with an A should have a Yes/No mandate
		Every space filled	Do all the stakeholders need to be consulted? Are there benefits in doing this?
		A lot of C's and I's	Is it necessary to always inform or consult stakeholders or can it be done when needed?
		A lot of I's	If too many stakeholders are informed it can slow down the process.

Figure 2. Vertical and Horizontal Analysis of a RASCI chart (Morgan 2008: 2-3).

As seen from Figure 2, in the vertical analysis of a RASCI chart, the involvement of each stakeholder can be assessed with one task at a time. The analysis also reflects on the state of having too many or too few stakeholders involved, which either can take the form of simply too many or too few involved, or too many or too few that needs to be informed. (Morgan 2008:2-3) The horizontal analysis analyses the allocation of roles within separate tasks. Each task should have an appropriate amount of each roles assigned. As each task is different, the number of assigned roles cannot be set beforehand.

According to Morgan (2008:1) and Solomon (2015:5), the RASCI chart should, due to clarified roles and responsibilities, a) eliminate duplicated work done by multiple stakeholders, b) eliminate tasks that are left unhandled because the stakeholders were not sure on who would carry it out c) balance workload and raise morale.

3.3 Concepts for Improving Multi-disciplinary Interaction

The following concepts for improving interaction between stakeholders can be considered as a common denominator for improving and clarifying the roles and responsibilities for interaction between the stakeholders. There might be more concepts available, however, listing all concepts is not a viable approach. Instead, a choice of the most common ones was done. The idea is to discuss and introduce the concepts meant to strengthen the interaction between stakeholders.

3.3.1 Communication Guidelines

As stressed by Hill and Bartol (2018), in modern work environments the growing significance of virtual teams cannot be neglected. In many teams, it makes the basic arrangement, or even the only mode, for stakeholder interaction. Best practice for behaviour in communication in virtual teams include the following guidelines: virtual team interaction needs to start with choosing the best technology for different tasks, setting clear goals and specifying intentions based on the type of environment of interaction, being responsive within the team, staying synchronized, and the manager being open and inclusive to the whole team.

Even though these behaviours are focused on teams that are split and not in the same location, the same approach can be utilized for the teams where the members are either fully or partly in the same location. The behaviours are further detailed below.

3.3.1.1 Selecting Technology for the Task

Many different methods of communication exist in modern workplaces, from conventional e-mail and WhatsApp to companywide social media platforms and video conferencing. Different levels of communication within a team exist as well. The communication can be one sided where information is relayed, here an e-mail might be best suited. When the task requires problem solving, multiple inputs and discussion between the team members, either a telephone call or video conferencing is better suited than having long e-mail chains. At the same time, other channels can also be useful - proven that they are selected carefully for the task. For example, actively using and getting used to instant messaging software can create a feeling of a virtual office and facilitate the feeling that the continuous contact is kept, and all parties are on board (James-Tanny 2010: chapter 6).

However, the more complex the subject is, the more personal the communication technology should become (Hill & Bartol 2018:3). Communication by email is irreversible and less flexible than oral communication (Huhta 2007:28). When parties try to reach an agreement or solve a problem, oral communication works better. Afterwards, when an agreement has been reached, this can very well be summarized in an e-mail or document, depending on the agreement.

3.3.1.2 Clearer Intentions

Text based communication can lead to unclear messages or unclear intentions while assumptions can lead to misunderstandings or conflicts (Hill & Bartol 2018:3-4). Interference when communicating can also be the source of misunderstandings. These misunderstandings can be related to distractions by the one sending the message or the one receiving the message. In the worst case, both. They might be due to answers done in a hurry and reading the message too quickly or may be due to distraction by external noise or having physical ailments such as tiredness, headache or hunger (Huhta 2007:21-22).

To avoid unclear communication and reduce the interruptions, team members should review messages thoroughly before sending, try to highlight parts that need attention and if needed, separate complex requests into separate e-mails to decrease the likelihood of some of the requests to be overlooked (Huhta 2007:21-22). When reading messages, the receiver should avoid reading them in places with distractions such as during coffee breaks or lunch and instead read them with thought at their desk.

3.3.1.3 Responsiveness

In local teams, trust is more easily built than in the teams that are split in different locations. However, trust is more critical for the split teams (Hill & Bartol 2018:5). According to James-Tanny (2010), to build trust in dispersed teams, the team members must learn to proactively give signals of their working with others in the assigned tasks. James-Tanny (2010: chapter 1) called this “closing the feedback loop”. This also includes giving a response that the message has been received and that actions are taken about it.

Without closing the loop, the request or initial message is left hanging in the air and the sender is unaware if the message was received, in the first place. According to Hill and Bartol (2018), proactively suggesting solutions for challenges that the team is facing and generally maintaining a positive attitude in communication are the other important ways of building trust.

3.3.1.4 Inclusiveness

Compared to teams in the same location, there can be tendencies in split teams of losing inclusiveness. The split teams often suffer from excessive written communications where the local group receives more communication than the parties that are in a different location. In such situations, open communication within the whole team and requesting input from all members in complex problems is the only way to tackle this situation. This, however, requires openness and inclusiveness across the whole team (Hill & Bartol 2018:5). This way, the benefits of having the whole team virtually in place is capitalized on as opposed to having only the local group.

Hill and Bartol (2018) argue that those virtual teams that have higher scores in the presented categories receive a higher score in overall performance as well. As these guidelines can be applied also to the local teams, the benefits become relevant as well. Thus,

the teams with thought out, agreed and documented guidelines based on the ones presented in this section, perform better than teams that are having *ad hoc* communication practices.

3.3.2 Ground Rules

Business practice suggests that having a set of ground rules within a team or department supports effective interaction within the team, it can improve the dynamics of the team and, in the end, increases the chance for success in all tasks the team performs.

The ground rules do not need to have a direct link to the business or activities but could be more general and focus on how the persons and stakeholders within the team treat and respect each other in different ways (Chaneski 2009:34). According to Huhta (2007), to be effective, the rules should be designed by the members of the team or department and not created and enforced by their manager. It also should be kept in mind that even though the rules are set, they are not set in stone (Peters 1999:1). The rules should be adapted to fit situations that were unforeseen when the rules were initially set.

3.3.2.1 Meeting Timeliness

One of the most important ground rules is meeting timeliness, in other words, the requirement that the meetings should start and end on time. This shows respect for the other members of the team or department (Chaneski 2009:34). All participants in the meetings have a duty to see to it that the focus is kept, and irrelevant matters are kept to a minimum (Huhta 2007:292). Time is equally important for all team members and having others wait on a team member due to invalid reasons is both unproductive and disrespectful.

Also, making a conscious effort of keeping the meeting on the agenda saves time, elevates productivity and makes sure all topics are handled during the meeting (Chaneski 2009:35). In teams, the track of time can easily be kept by appointing the role of a record keeper for every meeting (Huhta 2007:291). Thus, the allocation of time gets under control and becomes a contributor to the success of the meeting.

3.3.2.2 Preparation for Meetings

All teams have meetings, and many of these meetings require that tasks are completed beforehand. Not being prepared means that commitments are not met, and the success of the team often relies on how well the team handles its commitments (Chaneski 2009:34). Preparing for meetings can also mean to pre-introduce key-stakeholders to the agenda or problem areas, so that they can prepare a solution or suggestion before the meeting to make it more effective (Huhta 2007:291). This way, the progress of the meeting is not stopped but can fluently move forward and the challenges solved in a continuous motion.

To involve other team members before the actual meeting helps to commit them and a stronger unified front is created (Huhta 2007:291). As another example of an assignment in a team meeting, if an ordinary weekly meeting contains something extraordinary, a member of the team could be assigned or be given the task to handle that task during the meeting. This can be done either together or only with the support of the one calling the meeting or assigning the task.

Thus, keeping the time, working on the agenda and coming prepared becomes the main ground rules for team meeting by definition, This helps to avoid a grim situation when a team member, for example, is only given a slice of the intended or planned time, which can be extremely demotivating and means a waste of time as the time and effort for the preparation by the team member was essentially wasted.

3.3.2.3 Being Considerate

Being considerate is a basic human interaction ground rule as it depicts respect for other team members. According to Chaneski (2009:34-35), all members should be given the opportunity to speak and cultivate ideas or opinions. These inputs might not be agreed on by everyone, but everyone should have the opportunity and right to make themselves heard in a respectful way i.e. not being interrupted.

Direct or indirect open questions can be used to show consideration and facilitate that all members are included in the discussion. (Huhta 2007:25). An indirect open question is an open question for the whole team while a direct open question can be directed to a specific member of the team. All team members do not necessarily need to speak or

offer inputs in all cases, however, having had the opportunity to do so might increase the likelihood of them giving input in future topics.

3.3.2.4 Value Constructive Feedback

It is natural to have negative feelings if opposite views are presented in a clumsy way. By reacting in a wrong way to criticism that was meant to be constructive, participants can cause the criticism to be more destructive (Huhta 2007:294). This does not mean that feedback should not be given, the feedback should be given in a most constructive way by providing reasoning and references. At the same time, the receiver of criticism should try to avoid being defensive (DRM Associates 2016:1) so that the feedback situation can maintain a constructive atmosphere.

Team ground rules set the tone of the department, give backbone and increase the chance for working as a team instead of working as individuals (Chaneski 2009:1). Having a set of basic ground rules is better than having none at all. Without ground rules behaviour patterns are formed naturally (DRM Associates 2016:1) these patterns might have an adverse effect and might be difficult to get rid of if they are too ingrown.

3.3.3 Team Charter

Another important tool that helps to clarify the roles and responsibilities in the stakeholder interaction is a team charter. The team charter is seen by Wilkinson and Moran (1998: 355) as a mission statement or a work contract of a team. A dysfunctional team can have team members that make their own rules, miss their deliverables or misinterpret tasks and the team members are just out of sync and disconnected (Brownlee 2012:15). A team charter would then align the team members and reduce misinterpretations since the team members would know what is expected of them.

Huhta (2007:29-30) identifies different roles of a team which can be positive or negative. A team member might have multiple roles, either positive or negative. The positive roles include being a Facilitator who makes sure that all people are included and asks clarifying questions; a Leader who takes a leading role, this should not be mixed with an assigned manager. A Harmonizer role is a person who keeps tensions low by acting in a relaxed way and keeping the spirit up. A Record keeper is the person who keeps records and minutes, if needed, and generally makes notes or draws on a board to visualize

things. The Reporter takes the responsibility of preparing and compiling possible materials for submission. The common factor of these roles is that all contribute in their own way and in line with what the team is set out to perform. All of these positive roles are not mandatory to be visible or allocated in a group, however, if even some the roles are either allocated or spontaneously taken on, the team should be able to produce on a higher level.

Huhta (2007) presents also negative roles that can occur in teams. An Isolated team member might be physically present but fails to participate. A Dominator steals the show and talks too much and thus cripples the team by not letting others give their opinions. A Free Rider is a team member who lets everyone else do the work of the team or tries to do as little as possible. A Detractor is a person who criticises and complains without providing any solutions or suggestions to the presented problems. A Digresser tries to steer the team away from the purpose and waste time on doing something irrelevant to the mission. An Airhead is team member who rarely is prepared, and all actions are quick fixes with an ad hoc mentality. A Socializer prefers socializing instead of working on the problem. The common factor of the negative roles is that they either do not contribute to the team or they contribute in a disruptive way, making the work the team needs to do much heavier (Huhta (2007:29-30)). By noticing negative behaviours in oneself or in others in the team is the first step of trying to get rid or minimize the effect of these negative roles.

According to Wilkinson and Moran (1998: 356), a team charter would help the team of getting a clear picture of what their mission is and how they treat each other. This would leave little space for making own rules or misinterpreting tasks while getting the team aligned and focused. Typically, the following points can be addressed by the team charter, as summarized in Figure 3 below.

- Team name
- Mission of the team
- Version of the document
- How the team is placed within the organization
- Internal and external customers
- Objectives, goals and priorities
- Team leader
- Team members and their areas of expertise or titles
- Key stakeholders
- Deliverables
- Roles and responsibilities of team members
- Communication plan – how to communicate
- Scope or boundaries of the team
- Success metrics
- Achieved milestones with dates
- Risks
- Ground rules
- Signatures - so the charter is taken more seriously

Figure 3. Elements of the team charter (Brownlee 2015:15, Hill and Bartol 2018:6 and Wilkinson and Moran 1998:357).

As seen from Figure 3, the team charter can clarify the composition of the team, its aims, the charter can define its customers, boundaries and rules of interaction within the team. This is best to do in the beginning when the team has been created. By creating a team charter, the team is quickly on track on what is expected by them, what they should do and how they should work together.

As with the ground rules for the team, the charter should be agreed on by the team, not enforced by the manager as people tend to support what they have participated in creating (Watenpaugh 2018:1). Naturally, there are areas which are more or less defined by the company on a department level, such as the mission, objective and goals of the team as it is ultimately put together with these in mind. Thus, the team charter should be created by the team together with the manager. Another approach is to have the manager give the general guidelines and aspects that cannot be changed such as the deliverables and mission statement, and let the team then figure out the rest of the areas in the charter. A template for a team charter can be found from Appendix 1.

3.4 Conceptual Framework

This section discussed the approaches from existing literature on the topic of improving interaction by defining the roles and responsibilities for interaction in teams. Key themes were identified, and the most relevant tools were then selected and synthesized to form a conceptual framework. The conceptual framework is shown in Figure 4 below, and it consists of two elements.

First, the conceptual framework is built upon *the RASCI responsibility matrix*. This part comprises first of an *interactive* RASCI responsibility matrix that, as a tool for improving the stakeholder communication, should be filled by each stakeholder separately to identify where there are unclarities in the roles and responsibilities for interaction within the separate tasks. This is done by comparing the matrices and highlighting differences. Secondly, when the unclarities are mapped, the RASCI responsibility matrix is then used in an *iterative exercise* to reach a common understanding of what each stakeholder expects from the others during the different tasks i.e. the interactions between the stakeholders are clarified in a simple and co-created manner.

Second, the other critical element of improving the stakeholder interaction relates to utilization of the *concepts of multi-disciplinary interaction* to further strengthen the interaction within the team. The first introduced concept was communication guidelines in virtual teams. These consisted of a set of guidelines that were shown to increase the performance of the virtual team. As these guidelines could be transferred to local teams as well, the benefits would transfer as well. The second introduced concept was implementing a set of ground rules for the team. These rules could be seen as disconnected from

the actual work or business and would only concentrate on how the team members interact with each other, a code of conduct or “house-rules”. By having a set of rules increases the dynamics of the team compared to a team without a set of rules. The third and last concept introduced was a team charter which is similar to a work contract for the team. The team charter gives an explanation as to why the team is in place, it describes the team, the environment the team works in including risks, targets, customers and metrics. The charter would be best used if implemented when a team is newly formed, however, it can be implemented if a team is particularly dysfunctional or the team member show signs of disconnectedness.

These concepts for improving multi-disciplinary interaction can also be used for onboarding new members to the team. By showing clear and concise guidelines for communication, a set of ground rules to follow and a thorough team charter, the fresh recruit would be off to a flying start. Figure 4 below describes the conceptual framework of this study.

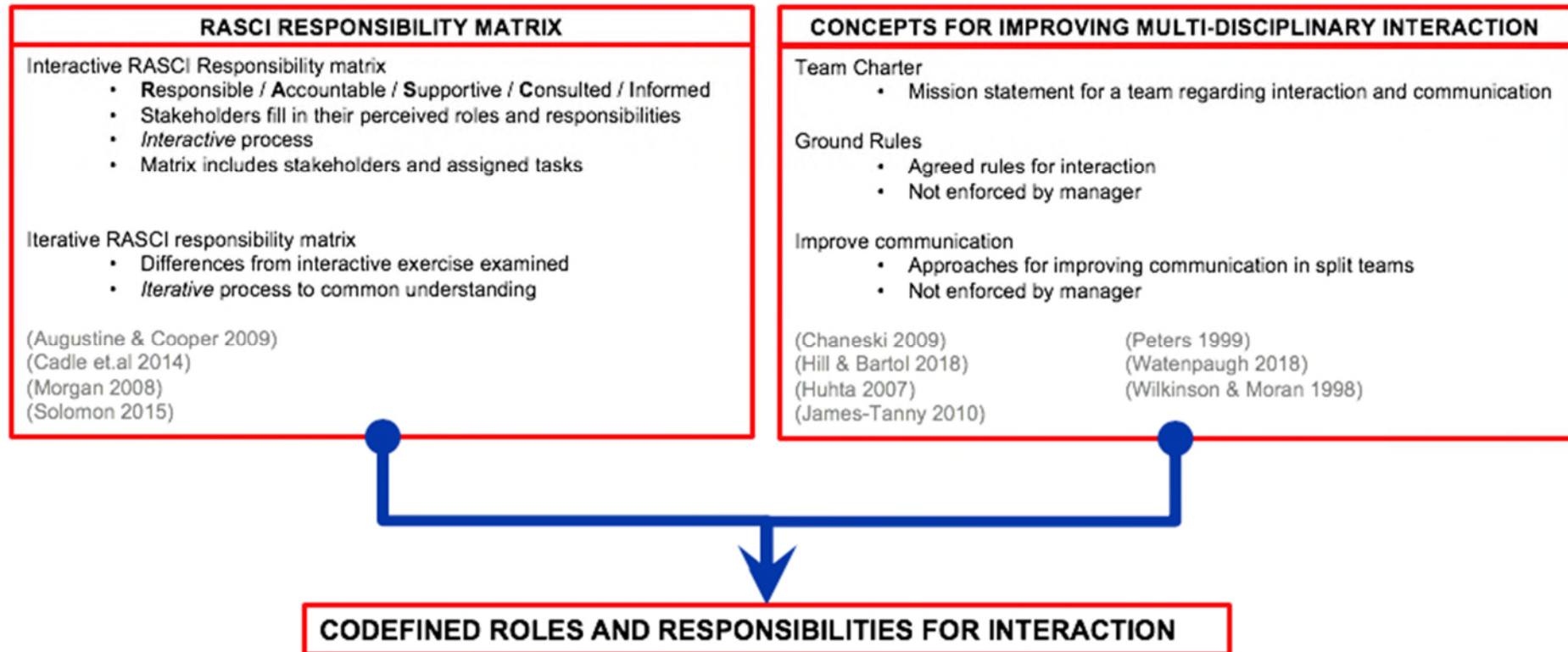


Figure 4. Conceptual framework of this study.

Figure 4 shows the two parts of the conceptual framework which highlights the concepts that can be used to improve the content and quality of stakeholder interaction within a team or department.

Section 5 will describe the proposal and creation of the selected concepts. Next, in Section 4, the current state analysis will use the RASCI approach for exploring the current state of stakeholder interaction in the case department of the case company.

4 Current State Analysis of the Existing Roles and Responsibilities for Interaction Within Case Department

This section discusses the current state analysis of the roles and responsibilities for interaction in the case department. First, an overview of the complete current state analysis is discussed. Secondly, the separate steps of the analysis are discussed and what the outcomes of those were. The section ends with a discussion on the key findings of the current state analysis.

4.1 Overview of the Current State Analysis Stage

As discussed in Section 1.2 the business challenge for the case department is to improve the roles and responsibilities for interaction between stakeholders within the case department.

The current state analysis was conducted in three steps. First, it focused on the investigation of the current roles and responsibilities for interaction existing in the case organization. For this end, the current state analysis was conducted in two workshops with the RASCI responsibility matrix used as a tool. In the first workshop, the stakeholders got a brief introduction to the study at hand and an introduction to the RASCI tool. In the second workshop, the stakeholders were asked to individually fill in the RASCI responsibility matrix based on the tasks defined from the first workshop. By compiling and mapping the RASCI matrices into a single matrix, the unclear tasks or roles could be identified.

Second, the current state analysis has drawn conclusions about the strengths and weaknesses of the current roles and responsibilities for interaction in the case organization.

Third, the key findings were discussed, and the areas selected for improvement chosen at the end of the current state analysis.

4.2 Workshop 1: Creating the List of Tasks (Finding of Data Collection 1)

In the invitation to Workshop 1, the wished outcome (a list of tasks) was communicated to the stakeholders to make the workshop more efficient. Eight participants were attend-

ing the workshop and provided input. The participants can be seen from Table 1 in Section 2.3. The topic and objective of the study was introduced together with the RASCI responsibility matrix.

The stakeholders were asked to list all the tasks involving interaction between each other, other departments or external customers. The instruction was to list tasks that are relevant and specific enough. The tasks were discussed until a common understanding of a list of relevant and well-defined tasks was reached. It was clear that the list did not include all the tasks the department does as a whole e.g. new recruitments are not part of the list as this is not relevant for the rest of the stakeholders. It was challenging to differentiate which tasks to be included in the list as the statement below illustrates.

“Why is creating a Bidaid not a task when creating the weekly report is one?”

Sales engineer

The statement above was in regard to the where to draw the line of putting a task on the list and when not to. Smaller processes that are in place are not listed separately since often they only concern one stakeholder and so are not relevant e.g. creating a Bidaid, a sales tool. Creating a Bidaid is very much a task of the department but it can be seen as quite mundane and should not need great interaction between stakeholders when done and so is not on the list separately. The weekly report on the other hand might need input from other stakeholders and the result of this task presented in a joint weekly meeting.

As two of the stakeholders were not able to make it to the workshop, they were asked separately to give input on tasks they see relevant. The inputs given by the two stakeholders was first cross-checked to the existing task list. If no matches could be found, they were entered as their own tasks. “Intercompany go to market collaboration” and “Global Vertical Market Analysis” are examples on tasks that were added after Workshop 1 based on the input from the missing stakeholders.

The task list was the outcome of the first workshop and can be seen below in Table 4.

Table 4. List of co-defined tasks.

TASK	DESCRIPTION 1
Lead generation	Finding/uncovering a lead for a possible case/project
Vertical lead generation	Finding/uncovering leads from global forums/databases/stakeholders
Commercial opportunity assessment	Assessment of uncovered lead from a commercial standpoint
Technical opportunity assessment	Assessment of uncovered lead from a technical standpoint
G1 review (SOLE)	Go/NoGo decision to move forward with the case. SOLE complexity analysis
Pre sales	Uncovering & influence needs, decision making process, value proposition
Marketing	Uncovering marketing needs, relaying information, digital marketing/exhibitions
Local Market Analysis	Market analysis of a local area, partner directly or indirectly involved, incl competitors
Global Vertical Market Analysis	Market analysis globally through Key Accounts, global actors or trends
Business development (geographical)	Identify and prioritize geographical penetration needs based on business plans
Business development (application)	Internal development of an application
Business development (technical)	Internal development of a product/assembly/solution
Intercompany go to market collaboration	Go to market collaboration between different companies within corporation
System design	Creating Hi-Fog designs/pre-designs, SOLE complexity analysis, system description
Supply documentation	Collect/create/ask PLM relevant documentation
Commercial tool development	Suggestions to existing tools, suggest new tools, create tools if applicable
Technical tool development	Suggestions to existing tools, suggest new tools, create tools if applicable
Gather and share best practices	Collecting and sharing best practices and lessons learned. Virtual team.
Partner capability assessment	Assessing partner capabilities in different areas
Partner training	Training outside official training program. Training during customer visits, emails...
Business review (partner)	Assessing what has been done and what is being done, past and near future
Business planning (partner)	Planning future with partner
Grow and develop existing Key Account	"Pre-sales" for Key Accounts, annual forecasts, relationship building
Develop and roll out frame agreements	Local organization involved
CRM Update	Updating CRM, cases, companies, persons, events...
Weekly Report	All activities related to weekly reporting
Customer visits	Handling customer visits
Material handling	Check PO, Pricing, Terms, Final SOLE, Acknowledgement, iScala, CSC, Logistics
Handling customer complaints	Escape process or "general complaints", before end of warranty
Handling Key account issues/problems	Issues/problems from a Key account.
Arrange commissioning	Arranging of commissioning practicalities and resources
MFA	Sending/receiving/analyzing/compiling MFA

As seen from Table 4, the tasks are ordered by time in a descending order wherever practical. The first task is "Lead generation" which can be seen as the first task done as a sale starts with a lead. The last task is "MFA" which stands for "Market Feedback Analysis" which is conducted at the end of a project or annually i.e. the last task performed.

The task list was used as the base for the interactive RASCI workshop which is discussed next.

4.3 Workshop 2: Interactive RASCI (Finding of Data Collection 1)

Workshop 2 was conducted a week after Workshop 1 with the same participants. The workshop began with a deeper introduction to the RASCI responsibility matrix. The different RASCI roles were explained and the possibilities for combined roles was shown. The task list was gone through to make sure every stakeholder was on the same page, that everyone understood what each task was and how it should be assessed. The different stakeholders were given, they consisted of the stakeholders in the workshop, the

direct managers, the rest of the departments in the company and external stakeholders. There are no other parties that need to be addressed. Naturally, third parties are contacted but these are rarely related to the core tasks where interaction of the stakeholders is needed at the same time e.g. travel arrangements and contacting embassies. These parties are external stakeholders, but they are not relative to the tasks listed. The listed stakeholders were presented to avoid confusions in this area.

After the introduction part of Workshop 2, a handout was given to the participants and they were able to start their allocation of roles. It quickly became evident that even though the thorough presentation and explanation of the previously co-listed tasks many of the entries were highly subjective and dependant on how you look at each task. As a Sales manager put it when handing in the filled matrix:

“This is my subjective view on how I see the tasks”.
Sales manager

The statement above gives insight on how Workshop 2 was perceived as, a highly subjective exercise. This could have been mitigated by having the tasks defined even clearer, e.g. exactly from which standpoint the task is analysed and truly creating a description of the task that would have left no reason for doubt or unclarity. However, as the tasks were explained and gone through in the beginning of the workshop all stakeholders were still given the same premise. This was the intention, to actually see how the different stakeholders see the roles of each other. If the tasks would have been explained to such a degree that there would not have been a possibility for subjectivity, the roles and responsibilities for the tasks would have needed to be explained and opened to the same degree, thus making the whole exercise unnecessary. When conducted this way, the stakeholders gave their own view of the current state of things.





Since the analysis of a RASCI chart does not readily give exact strengths and weaknesses of a group, this was asked as a general question after all stakeholders had filled in their matrix. Asking about the strengths and weaknesses was done before any results of the RASCI responsibility matrix was shown, as this was done in Workshop 3, a week later. Section 4.4.1. discusses the strengths and weaknesses in interaction within the case department.

Workshop 2 yielded eight different RASCI matrices based on which the current state analysis could be done. The next section discusses the combined RASCI responsibility matrix which shows the current view on the roles and responsibilities for interaction.

4.4 Analysis of the Current Roles and Responsibilities for Interaction Within Case Department

Based on the results of the current state analysis, the RASCI responsibility matrices from Workshop 2 were made by gathering into one single matrix and combining all entries from the matrices for all tasks. The compiled matrix was mapped by a color code to better be able to identify the areas, tasks or stakeholders which were most unclear. The color coding is explained below in Table 5.

Table 5. Color code used in highlighting differences.

Color	Definition	Example
Green	0-2 different entries	
Yellow	3 different entries	
Orange	4 different entries	
Red	5-6 different entries	

As seen from Table 5, the green cells are entries with 0-2 entries. Cells with no role, one role or a double role in the task are marked green as these can be seen as viable alternatives. The yellow and orange entries have 3 or 4 different entries respectively as these roles for tasks are incrementally viewed more differently. The red cells have 5 or 6 different entries. The maximum amount of entries a role can have is 6 roles, each different RASCI role and a “no role” entry. As such, it cannot get more wrong than all 6 roles assigned. In Workshop 2, having all roles assigned to a stakeholder within a task quickly adopted the term “full house”.

The compiled and mapped RASCI responsibility matrix can be seen below in Table 6.

Table 6. Current state of roles and responsibilities for interaction in the case department.

Task / Process	STAKEHOLDERS			MANAGEMENT			INTERNAL STAKEHOLDERS								CUSTOMER	
	Sales Engineer	Sales Manager	Key Account Manager	MSC Manager	Director	Engineering	Finance	HR	Land Aftersales	Legal	Marketing & Training	Operations	Quality	Other BU	End-Customer	Partner
Lead generation	S_	RAS	RAC_	CI_	CI_	C_					RS_				C_	RASI_
Vertical lead generation	S_	RASCI_	RA	AI_	I_	C_					RS_				SCI_	RASCI_
Commercial opportunity assessment	RS_	RAS	RAC_	ASCI_	A_	S_	C_			CS_	C_	S_			C_	RSC_
Technical opportunity assessment	RAS_	RASCI	SCI_	AC_		ASC			C_			C_	C_		C_	C_
G1 review (SOLE)	S_	RA	A_	ASI_	CI_	C_	C_			SC_		SC_	C_		I_	CI_
Pre sales	RSC	RA	RAS_	ASC_		SC_			S_	C_				RA_	I_	RAS_
Marketing	S/_	RASCI	SCI_	ASCI	AI_						RASI			SC_	I_	RSCI_
Local Market Analysis	S_	RAC	C_	ASI_	I_	S_			RS_		SC_				C_	RASC
Global Vertical Market Analysis	S_	SCI_	RA	AI_	I_				RS_		RAS_			SC_	C_	SCI
Business development (geographical)	RS_	RASC	C_	RASI_	AI_	SC_			SC_		RSC_				C_	RSCI_
Business development (application)	RSCI_	RACI_	RAC	ACI	AI	RASC			C_		RSI	C_			C_	SCI_
Business development (technical)	RSC	RCI_	RCI	AI	AI	RAS			CS_		S_				C_	SCI
Intercompany go to market collaboration	S_	SC_	RAS_	RAI	RAC	ASC	A_	A_	SC_	A_	SC_			RS_		SCI
System design	RA	RASCI	SC_	CI_	I_	RASC			C_			C_	C_		CI	RASCI
Supply documentation	RA	RACI_	SCI			RAS			CS_		SC_	S_			I_	SCI
Technical tool development	RA	RSI_	RI	RAI	I_	RASC	C_		RCS_				SC_			SCI
Commercial tool development	RS	R/A	R_	RA	I_		RS_				S_	S_				
Gather and share best practices	RA	RA	RASC	RA	I_	RAI			RA		I_		RA	SC	C_	RASC
Partner capability assessment	SC	RA	C_	RASI	I_				S_		I_					SCI
Partner training	RS	RASC	RS	AS	I	S_			RA	S_	RASC					RI
Business review (partner)	S_	RA	CI	ACI	I_				C_					RA		RSC
Business planning (partner)	S_	RA	RCI	ACI	I_		IS		C_		I_			RA		RSC
Grow and develop existing Key Account	SC	RASC_	RA	AI	AI	RSC			SC_		SC_		SC	RC	C_	SC
Develop and roll out frame agreements	SC	SC_	RASC	ASCI	RAI	SC	SC_		SC	RSC		I_	SC	C_	C_	SCI
CRM Update	RS	RA	RA	AI	I_				RS		I_			RAI		SC
Weekly Report	RASC	RA	RASI	RACI	I		SI_		RSC			I_		R_		SC
Customer visits	RS	RA	RA	RASI	SI_	S_		S_	RS			S_	S_		CI	RASCI
Material handling	RAS	RASI	S_	AI	I_	C_	RI_		CI			RSCI	CS_		I	CI
Handling customer complaints	RS	RAC_	RAC	RAC	I_	SC_	S_		RASCI	SC		SC	RAS	RA	CI	RCI
Handling Key account issues/problems	RSC	RSI_	RA	ASC	I_	CS	S_		CS	SC		SCI	RASC	R_	CI	RI
Arrange commissioning	RASC	RA_	CS	I	I_	CS			RAS		S_	CS	CS		I	RACI
MFA	RAS	RASCI_	SC_	AI	I_	I_			RA		R_	I_	I_		SC	SCI



As seen from Table 6, the roles of the different stakeholders are now mapped. This is a current view on how the stakeholders see the roles of each other related to the tasks of the department.

As seen from Table 6, the roles of the internal stakeholders are seen as clear by the stakeholders as only four red cells can be found from four separate tasks. Moreover, the role of HR is minimal in the day to day business of the stakeholder with the only completely green column. It is as should be, since HR is not relevant when working either internally between departments or towards external customers. Also, the fact that the role of Aftersales start in a later stage, proves that the timeline is set correctly. Another finding that could be seen as positive is that only one task has two of the stakeholders roles marked with red cells. The more red cells a task has the more unclear it is seen by the stakeholders doing the assessment thus, having only one task with two red cells can be seen as positive finding.

These positively viewed findings can be seen highlighted with blue rectangles from Table 7 below.

The most unclear role seemed to be the one of the Sales Manager, partly perhaps because the two other roles are inherently clearer with the Sales Engineer being a supportive role and the Key Account Manager concentrating on Key Account issues. This leaves the Sales Manager role as most unclear which the RASCI matrix shows in Table 6. In general, the roles between the stakeholders and their manager are more unclear than for the rest of the internal stakeholders. Part of the reason for this might be that the internal stakeholders have more supportive roles in the tasks and so, their roles are inherently clearer than between the stakeholders now assessed. One interesting finding was also that the role of the partner was so unclear. Partly due to the subjectivity of the exercise, however, not all differences can be explained by this fact.

The areas with the biggest challenges with the current roles and responsibilities for the interaction are highlighted in pink in Table 7 below.

Table 7. Current state of roles and responsibilities for interaction in the case organization (with the problem areas highlighted).

Task / Process	STAKEHOLDERS			MANAGEMENT				INTERNAL STAKEHOLDERS							CUSTOMER	
	Sales Engineer	Sales Manager	Key Account Manager	MSC Manager	Director	Engineering	Finance	HR	Land Aftersales	Legal	Marketing & Training	Operations	Quality	Other BU	End-Customer	Partner
Lead generation	S_	RAS	RAC	CI_	CI_	C_					RS_				C_	RASI
Vertical lead generation	S_	RASCI	RA	AI_	I_	C_					RS_				SCI_	RASCI
Commercial opportunity assessment	RS_	RAS	RAC_	ASCI	A_	S_	C_			CS_	C_	S_			C_	RSC
Technical opportunity assessment	RAS_	RASCI	SCI_	AC_		ASC						C_	C_		C_	C_
G1 review (SOLE)	S_	RA	A_	ASI	CI_	C_	C_			SC_		SC_	C_		I_	CI_
Pre sales	RSC	RA	RAS_	ASC_		SC_				S_	C_			RA_	I_	RAS
Marketing	S/_	RASCI	SCI_	ASCI	AI_						RASI			SC_	I_	RSCI
Local Market Analysis	S_	RAC	C_	ASI	I_	S_				RS_		SC_			C_	RASC
Global Vertical Market Analysis	S_	SCI_	RA	AI_	I_					RS_		RAS		SC_	C_	SCI
Business development (geographical)	RS_	RASC	C_	RASI	AI_	SC_				SC_		RSC_			C_	RSCI
Business development (application)	RSCI	RACI	RAC	ACI	AI	RASC				C_		RSI	C_		C_	SCI
Business development (technical)	RSC	RCI_	RCI	AI	AI	RAS				CS		S_			C_	SCI
Intercompany go to market collaboration	S_	SC_	RAS	RAI	RAC	ASC	A_	A_		SC	A_	SC_			RS_	SCI
System design	RA	RASCI	SC	CI	I_	RASC				C_			C_		CI	RASCI
Supply documentation	RA	RACI	SCI			RAS				CS		SC	S_		I_	SCI
Technical tool development	RA	RSI_	RI	RAI	I_	RASC	C_			RCS			SC_			SCI
Commercial tool development	RS	R/A	R_	RA	I_		RS_				S_	S_				
Gather and share best practices	RA	RA	RASC	RA	I_	RAI				RA		I_		RA	SC	C_
Partner capability assessment	SC	RA	C_	RASI	I_					S_		I_				SCI
Partner training	RS	RASC	RS	AS	I_	S_				RA	S_	RASC				RI
Business review (partner)	S_	RA	CI_	ACI	I_					C_					RA	RSC
Business planning (partner)	S_	RA	RCI	ACI	I_		IS			C_		I_			RA	RSC
Grow and develop existing Key Account	SC_	RASC_	RA	AI	AI	RSC				SC		SC		SC_	RC	C_
Develop and roll out frame agreements	SC	SC_	RASC	RSCI	RAI	SC	SC_			SC	RSC		I_	SC_	C_	SCI
CRM Update	RS	RA	RA	AI	I_					RS		I_			RAI	SC
Weekly Report	RASC	RA	RASI	RACI	I_		SI_			RSC		I_			R_	SC
Customer visits	RS	RA	RA	RASCI	SI	S_		S_		RS		S_	S_		CI	RASCI
Material handling	RAS	RASI	S_	AI_	I_	C_	RI_			CI			RSCI	CS	I_	CI
Handling customer complaints	RS	RAC_	RAC	RAC	I_	SC	S_			RASCI	SC		SC_	RAS	RA	RCI
Handling Key account issues/problems	RSC	RSI_	RA	ASC	I_	CS	S_			CS	SC		SC_	RASC	R_	CI
Arrange commissioning	RASC	RA_	CS	I_	I_	CS				RAS		S_	CS	CS	I_	RACI
MFA	RAS	RASCI	SC	AI	I_	I_				RA		R_	I_	I_	SC	SCI

Next, the matrix is aligned by the stakeholders of the case department, and a common understanding of the roles and responsibilities for the tasks is described, and thus the interactions within a task are defined as for their current state.

4.4.1 Strength and Weaknesses in the Current Roles and Responsibilities for Interaction

In the end of Workshop 2, the stakeholders were asked to think about the strengths and weaknesses of the case department from the point of view of interaction between stakeholders. The discussion quickly derailed into finding weaknesses in the whole case company but in the end, the strengths and weaknesses in Table 8 below were identified.

Table 8. Self-assessed strengths and weaknesses

Strengths		Weaknesses	
S1	Flexibility – supporting each other	W1	Small team
S2	Do it yourself mentality	W2	Everyone doing everything
S3	Attitude – having a spark in the eyes	W3	Inefficiency – two people doing the same tasks
S4	Customer focus		
S5	Experienced team		

As seen from Table 8, the weaknesses are mostly related to unclear responsibilities (W2 and W3), the remaining weakness is a situational weakness as the team has a couple of backfills waiting to happen. The strengths are related to managing the weaknesses by being flexible (S1) and having a good mentality and morale on the work that simply needs to get done (S2, S3 and S4).

This study aims to mitigate two of the three weaknesses, W2 and W3 by clarifying the roles and increasing interaction. By having clear roles and clearer interaction, the inefficiencies should be removed or at least mitigated. The third weakness cannot be changed with this study. However, given time, the weakness should be solved by itself when recruitments are carried out and the new employees taught and proficient in their role(s).

Summary of the views on the current roles and responsibilities for interaction in Table 7 gives the following conclusions as described in Table 9.

Table 9. Summary of findings from the current view on roles and responsibilities for interaction.

Phenomenon	Implication	Rationale for implication
The role of the Partner is unclear	Unclear who is responsible in each phase, case company or partner	If it was clearer the colors would have been more green/yellow.
Small number of roles assigned for HR	HR role is minimal in relevant core tasks of the sales department	Selling systems or components might not require the input from HR as that is more a department for internal business.
Only one task has two red cells for the key stakeholders (Business development (application))	All other roles have only one red cell i.e. only one role is more unclear in each task.	Things are not as bad as it looks. If there would be multiple very unclear roles for each task, it would show a quite unhealthy department. By clarifying one role, the others should fall into place.
Most red cells in the Sales Manager column	The Sales Manager role is the most unclear	The other roles are more readily defined, Sales Engineer can be seen as a support function and the KAM more concentrated on specified verticals or key accounts
Land aftersales roles start in a later phase	The tasks are ordered in a correct way	After sales focus is on activities after the actual sale

Table 9 above highlights the main phenomena that can readily be seen from Table 6. Some of the unclarities can occur due to the subjective nature of the interactive RASCI matrix exercise, however, the results still shows that there are unclarities.

4.5 Key Findings from the Current State Analysis

This sub-section provides an overview of the main strengths and weaknesses and identified trends in the current state analysis in the previous chapters.

First and foremost, it can be stated that there *are* differences in how the different stakeholders see the tasks of each other and the rest of the department. Thus, this confirms the business challenge as stated in Section 1.2.

Secondly, in each task, except one, there is only one role that is more unclear than the rest for the main stakeholders in the department. By clarifying this role, the other roles should become more or less automatically clear.

The actual, pure, interaction between the stakeholders might not be readily visible from the RASCI responsibility matrix, but it is an underlying feature. As the roles are clarified so is the interaction, since the stakeholders know in what role the other stakeholder is and know what to expect and what to demand of the other stakeholders.

Thirdly, the task list in Workshop 1 was created quite easily and quickly after a brief phase of not completely understanding what was needed. If the task list would have required more time and thought, then it would have shown that the team does not know what they should do as it would have been so difficult to crystallize the different tasks. That the team managed to give a comprehensive and list of relative tasks in a relatively short time proves that the team knows what they should do and what is expected of them.

Next, in Section 5, after identifying challenges with the current roles and responsibilities for interaction in the case organization, these roles and responsibilities are redefined in the next step, so that to improve the current situation. The roles and responsibilities are co-defined based on the existing compiled RASCI matrix in Table 6. The next section also relies on applying selected tools and concepts for improving multi-disciplinary interaction from literature and best practice, which then completes the proposal building phase.

5 Co-defining of Proposal for Improving Roles and Responsibilities for Interaction in the Case Department

This section merges the results of the current state analysis and the conceptual framework towards the building the initial proposal. It starts with the overview of the proposal building steps and ends with a draft of the proposal, since the proposal will be validated next, in Section 6.

5.1 Overview of the Proposal Building Stage

The current state analysis showed that there were differences in how the stakeholders view the tasks of each other. Therefore, the proposal relies on co-defining the roles and responsibilities together with all the stakeholders, and also on applying selected tools and concepts for improving multi-disciplinary interaction from literature and best practice, so that to support the proposal building phase.

The proposal building phase is divided into two separate aspects. First, the RASCI responsibility matrix is aligned between the stakeholders so that all stakeholders have the same view on the roles and responsibilities within the tasks.

Second, the tools and concepts for improving multi-disciplinary interaction were applied to co-define the similar concepts as selected for proposal building in Section 3.3.

5.2 Workshop 3: Iterative RASCI Matrix (Finding of Data Collection 2)

Workshop 3 was conducted following Workshop 2 with the same participants. This way, the RASCI tool and the tasks were still fresh in mind for the stakeholders. First, the intent of the workshop was explained, to create an aligned RASCI matrix. Next, the aspects of how to analyse a RASCI matrix from Figure 2 in Section 3.2 was introduced. Then, the results of the interactive RASCI workshop was shown and analysed. After this, aligning of the matrix started. An approach was to first tackle the departments with the least amount of interaction with the case department. This was done to streamline the matrix to have as few as possible columns to worry about.

Table 10 below shows the proposal for the iterative RASCI matrix where all stakeholders are aligned with the allocated RASCI roles.

Table 10. Initial proposal from iterative RASCI exercise.

RASCI - Case department - Iterative exercise																			
Task / Process	STAKEHOLDERS			MANAGEMENT			INTERNAL STAKEHOLDERS								CUSTOMER				
	Sales Engineer	Sales Manager	Key Account Manager	Manager	Director	Engineering	Finance	HR	Land Aftersales	Legal	Marketing & Training	Operations	Quality	Other BU	End-Customer	Partner			
Lead generation		R	A	C	C	I	I	C			S				C	R			
Vertical lead generation		C	R	A	C	I	I	C			S				C	R			
Commercial opportunity assessment	S	R	A	R	A	S	C		C	S		S			C	S			
Technical opportunity assessment	R	R	A	R	A	S			R						C	S			
G1 review (SOLE)	S	R	A	I	A		S	C		S		S			I	C	I		
Pre sales	S	R	A	R	A	S			S			S	S		C	R	A		
Marketing	S	R	S	R	S	A	A				R	A				R	S		
Local Market Analysis		R	C	I	I	I			I		I						A		
Global Vertical Market Analysis		C	R	A	I	I	I				I			C	I		C	I	
Business development (geographical)		S	S	R	A	I				S							S		
Business development (application)	S	S	S	C	I	A	R		C		S	I			C	S			
Business development (technical)	S	S	S	C	I	A	R		C		S	I			C	S			
Intercompany go to market collaboration		S	C	S	S	R					S						S		
System design	R	A	A	A	I		S	C		S		S			C	S			
Supply documentation	R	A	C	I	R	A			S		S	S			I	C	I		
Commercial tool development	R	S	R	R	R	A	I	S	S		S		S						
Technical tool development	R	A	I	C	I		A			I							I		
Gather and share best practices	S	R	R	A	S	I	S		R		R		S	S		R	C		
Partner capability assessment	S	R	A	C	C	I	I			R		R	A			C	I		
Partner training	R	S	R	S	R	S	S		S		R	S	R	S	R	A		I	
Business review (partner)	S	R	A	C	I	I			S							R	C		
Business planning (partner)	S	R	A	C	C	I	C	I		C	I	S				C	I		
Grow and develop existing Key Account	S	S	R	A	S	C	I	I		S		I		I	C	I	S		
Develop and roll out frame agreements	S	S	R	A	R	A	C	I	C	C			I		I	C	I		
CRM Update		R	A	R	A	I	I			I		I					C		
Weekly Report	R	R	I	A	I			S	I		R						C		
Customer visits	R	S	R	A	R	A	S	I	S	I	S				C	S			
Material handling	R	S	R	A		I	I	R	I		S		RA	C		C	I		
Handling customer complaints	R	A	I	C	I	I	S	C		S	S		S	S	C	I	S	I	
Handling Key account issues/problems	R	S	A	C	I	I	S	C		S	S		S	S	S	C	I	S	I
Arrange commissioning	R	A	S		I		S			R		S		S	I	R	A		
MFA	S	S	S	A	I					S		I	I		C	S			

The initial proposal can be seen from Table 10 above. Here, all the tasks have clarified roles by all stakeholders. The different roles are color coded based in Table 11 below.

After the initial cleansing of the matrix, the group started methodically to go through the matrix, one task at a time, and allocating RASCI roles to each stakeholder based on the preliminary entries. Some tasks sparked more discussion than others with differences in how to view the tasks was discussed as the statement below shows.

“I am not Accountable for Lead Generation from my partner!”
-Sales Manager

In the end, however, the Sales Manager was Accountable, since the team came to the conclusion that the manager is in fact Accountable *to see to it* that the partner does generate leads from their market. The Sales Manager does not have to generate leads in practice but is still accountable that this activity takes place within the assigned market area.

All stakeholders were encouraged to give their inputs, and all did. The workshop was divided into three separate occasions on different days as the allocated time was not enough on the first two meetings. This was not necessarily a bad thing as the team could relax and not be numbed by the number of tasks that needed to be analysed.

Table 11. Color coding of the proposed iterative RASCI table.

Role	Definition	Color
R	Responsible	Blue
A	Accountable	Red
S	Supporting	Green
C	Consulted	Orange
I	Informed	Yellow

The stakeholders agreed that the colors in Table 11 can be changed as seen fit. Stronger colors are chosen for the stronger, more active roles (R, A and S) while the softer, more abstract roles (C and I) have softer colors.

The final version of the proposed RASCI matrix was approved by all stakeholders and thus this part of the proposal building phase was completed.

5.3 Workshop 4: Introducing Concepts for Improving Multi-Disciplinary Interaction (Finding of Data Collection 2)

The fourth and final workshop was conducted with the same participants as in the two previous workshops. One Sales Engineer was absent due to personal matters. All stakeholders were represented. The participants were given an introduction on what had been done previously and a brief outlook on the research design (Figure 1) and a more in-depth look on the conceptual framework (Figure 4) of this study. The concepts for improving multi-disciplinary interactions were introduced and discussed one by one. The introduction included showing an example of each concept.

First, the Team Charter from Section 3.3.3 was discussed. Relatively quickly the team came to the conclusion that, although it might be a useful document to have, at least for introducing new employees, the creating and implementing a Team Charter might not be needed right now as the team does function well and is not a newly founded team. The team knows what it should do and what is expected from it. This is backed up by the relative ease it took to generate the task list for the RASCI exercises previously done.

The next concept discussed was the Communication Guidelines from Section 3.3.1. In a similar manner as with the Team Charter, the concept was introduced and discussed. Here, the team agreed that the guidelines could very well be created and implemented. After the example was shown some needs were directly addressed:

“This is what I would like you to do but you never do this.”
-Sales Manager

The statement above was regarding sending acknowledgment messages when support is asked by a Sales Manager from a Sales Engineer for a task. The example guidelines given were changed by the team to better be understood and be clearer. In the end, all stakeholders agreed on the guidelines presented in Figure 5 below.

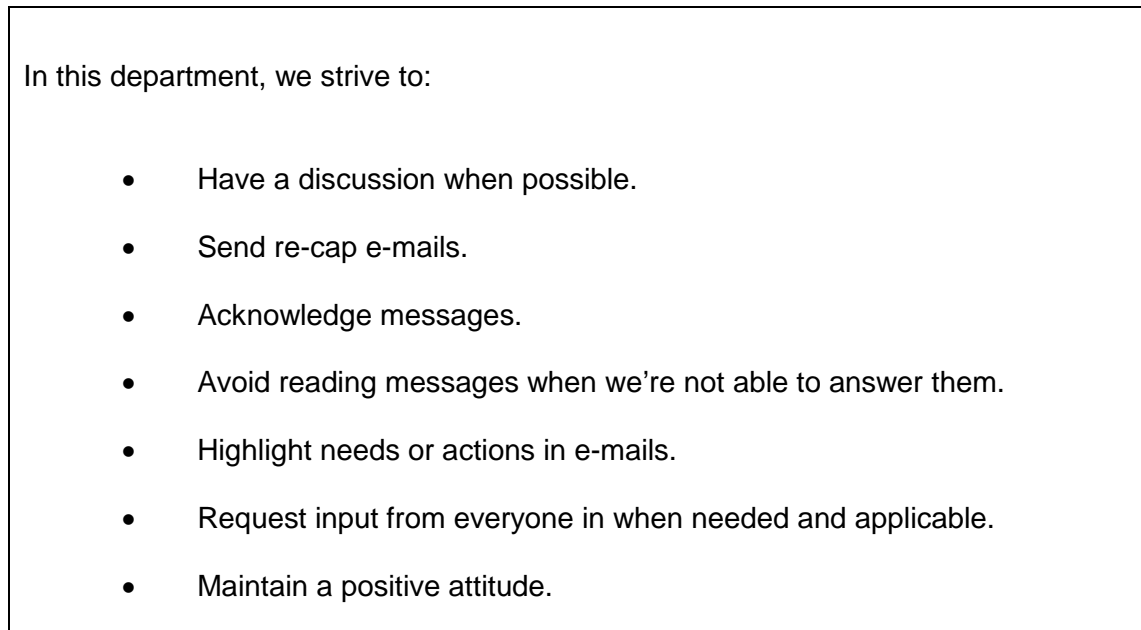


Figure 5. Initial proposal for communication guidelines

The guidelines presented above were accepted by the stakeholders present and correlate well with the conceptual framework. Additionally, a WhatsApp group will be created. The intent of the WhatsApp group is to create a channel for quick fixes when a stakeholder is out of the office e.g. asking or confirming a technical detail. The WhatsApp group would also facilitate informal communication between the team members during business trips or even vacation periods. Separate rules and guidelines for the WhatsApp group can be implemented if seen necessary.

The last concept to be introduced and discussed was the Ground Rules from Section 3.3.2. As with the previous Communication Guidelines, the benefits of having Ground Rules in place in general was accepted by the stakeholders. The example was modified to fit the views of the team and can be seen from Figure 6 below.

Dear Reader, in this department:

- We arrive on time to meetings.
- Meetings start and end on time.
- We focus on relevant issues during meetings.
- We prepare for meetings.
- We let everyone speak uninterrupted.
- We respect the working time.
- We value constructive feedback.
- We recognize and celebrate accomplishments.
- We treat each other with respect.
- We remember that we work in an open office.
- We accept the responsibility and accountability along with the authority given.
- We strive to maintain a positive attitude.
- We don't use Comic Sans.
- We get things done.

Figure 6. Initial proposal for ground rules

The first five rules are related to meetings as they are interaction intensive occasions. The last two rules are not as serious as the rest of the rules. It was discussed if these dilute the seriousness of the rest of the rules. In the end, they were kept since the Ground Rules should still reflect the team and the spirit of the department.

The stakeholders agreed to sign the documents when they have reached their final form to make them more valid and actual. Ways of implementing and communicating the documents was also assessed. The documents will be sent to the stakeholders by e-mail, the signed documents will be placed on an info board in the office and the documents will be assessed annually in relation to the Kick-Off meeting which is held in the beginning of each year.

5.4 Proposal Draft

The proposal now consists of three elements: (a) the iterative RASCI from Table 10, (b) the Communication Guidelines, and (c) the Ground Rules. These three elements were co-defined with the stakeholders in the case organization and thus together make the content of the initial proposal, as shown in Figure 7 below.

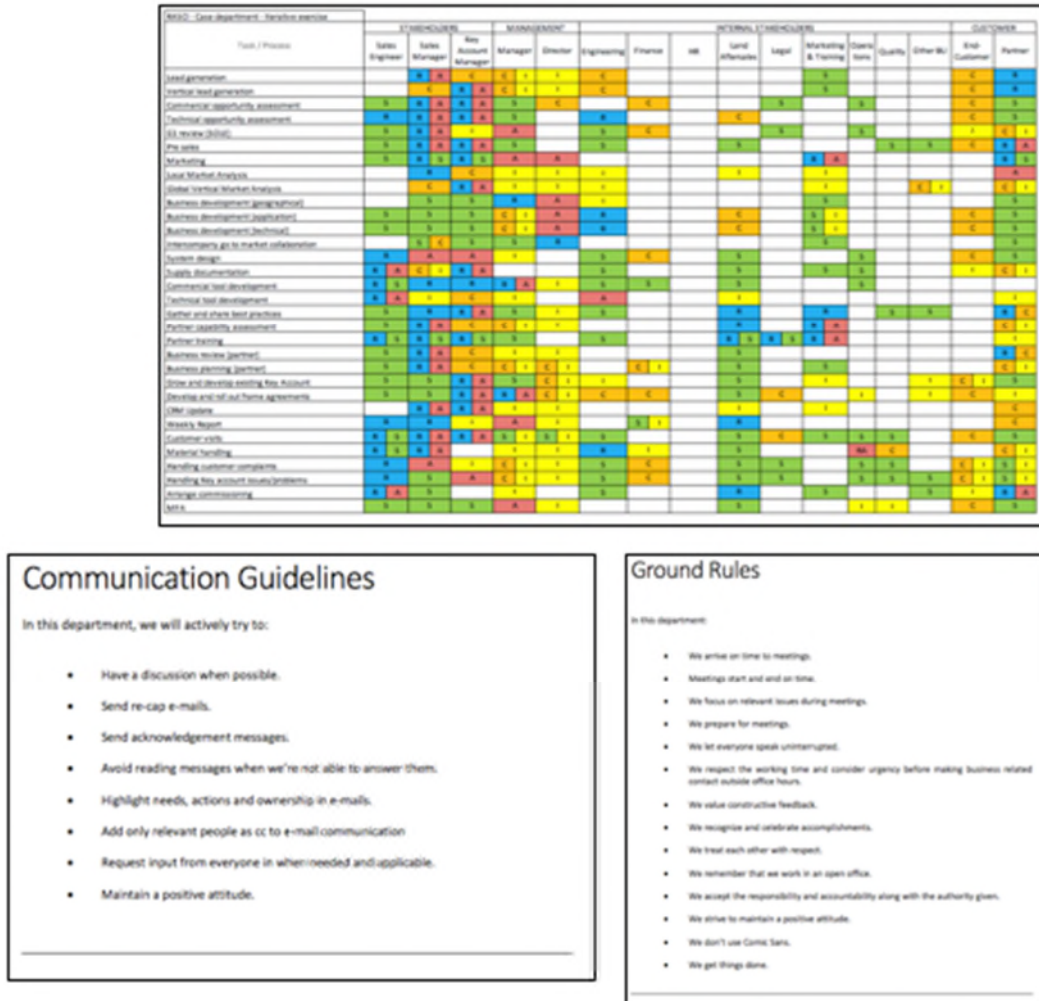


Figure 7. Initial proposal for defining the roles and responsibilities for interaction in the case organization.

This initial proposal is next validated with the common manager of the stakeholders in the next section, Validation of the Proposal.

6 Validation of the Proposal for the Roles and Responsibilities for Interaction in the Case Department

This section reports on the results of the validation stage and presents further developments of the initial proposal. At the end of this section, the final proposals and implementation plan are presented.

6.1 Overview of the Validation Stage

In the validation stage, the initial proposal from the stakeholders is assessed, reviewed and, if needed, changed by the common manager of the stakeholders.

The validation workshop was carried out as a discussion with the manager. First, the complete study was presented as a reminder and to create the setting for discussion. Second, the current state analysis was discussed, and the business challenge was confirmed. The discussion on the initial proposal began with reviewing the results of the iterative RASCI created as the results for the current state analysis. The matrix was discussed as a whole and it was decided to analyse it task by task after the second part of the initial proposal had been assessed.

The second part of the initial proposal, consisting of the Communication Guidelines and Ground Rules, was presented in the same way as in Workshop 4 except that instead of an example the proposal was shown. The Communication Guidelines and the Ground Rules were discussed separately and comments and additions were recorded.

Finally, the RASCI matrix was analysed more thoroughly by analysing each task separately and the changes were recorded and agreed on.

6.2 Feedback Received and Further Development (Findings of Data Collection 3)

Overall, the proposals were well received, and only small changes or additions were needed. The different parts of the validated proposal are presented separately below.

6.2.1 Further Developments to the RASCI Matrix and Its Final Proposal

As seen from Table 12, two states are highlighted in the improved RASCI matrix. First, as highlighted to the left in red, the initial proposal.

Second, as highlighted to the left in green, the validated proposal. As seen from Table 12, only the roles that changed in the tasks are highlighted with their assigned RASCI role color from Table 11.

As seen from Table 12, minor changes were done to the proposed roles. The stakeholders now take a more active role in the “Business development of an application” task as the case department is a business department.

In the “Technical development of the business”, the affected stakeholders take a step back as the role is changed to a consulted role. The rationale being that the technical issues can be challenging for Sales Managers and Key Account Managers who do not daily need to worry about technical details as this is more the area of the Sales Engineer.

In the “Supply documentation” task, the Key Account Managers are given a supportive role and most of the work is done by the Sales Engineer who might have the needed documentation more easily available.

In the “Gather and share best practices”, the Sales Engineers are put on the same line as the other stakeholders and the Manager is now held accountable to see to it that the task gets done. The Sales Engineers are also now supportive in the task regarding the CRM update.

In the tasks regarding handling customer complaints, the Sales Managers and Key Account Managers now take a more active role as they are both responsible and accountable while the Sales Engineer takes a supportive role.

Table 12 below illustrates the developed content in the RASCI matrix after the validation stage and Table 13 shows the final proposal.

Table 12. RASCI matrix developments in the validation stage.

OLD	Task	Sales Engineer	Sales Manager	Key Account Manager	Manager	
	Business development (application)	S	S	S	C	I
	Business development (technical)	S	S	S	C	I
	Supply documentation	R A	C I	R A		
	Gather and share best practices	S	R	R A	S	
	CRM Update		R A	R A	I	
	Handling customer complaints	R	A	I	C	I
	Handling Key account issues/problems	R	S	A	C	I
NEW	Task	Sales Engineer	Sales Manager	Key Account Manager	Manager	
	Business development (application)	S	R	R	R	
	Business development (technical)	S	C	C	C	I
	Supply documentation	R A	C I	S		
	Gather and share best practices	R	R	R A	A	
	CRM Update	S	R A	R A	I	
	Handling customer complaints	S	R A	I	C	I
	Handling Key account issues/problems	S	S	R A	C	I

Table 13. RASCI Matrix, final proposal.

RASCI MATRIX - Business unit																		
Task / Process	STAKEHOLDERS			MANAGEMENT			INTERNAL STAKEHOLDERS								CUSTOMER			
	Sales Engineer	Sales Manager	Key Account Manager	Manager	Director	Engineering	Finance	HR	Land Aftersales	Legal	Marketing & Training	Operations	Quality	Other BU	End-Customer	Partner		
Lead generation		R	A	C	C	I	I	C			S				C	R		
Vertical lead generation		C	R	A	C	I	I	C			S				C	R		
Commercial opportunity assessment	S	R	A	R	A	S	C		C	S		S			C	S		
Technical opportunity assessment	R	R	A	R	A	S		R		C					C	S		
G1 review (SOLE)	S	R	A	I	A			S	C		S		S		I	C	I	
Pre sales	S	R	A	R	A	S		S		S			S	S	C	R	A	
Marketing	S	R	S	R	S	A	A				R	A				R	S	
Local Market Analysis		R	C	I	I	I			I		I						A	
Global Vertical Market Analysis		C	R	A	I	I	I				I			C	I		C	I
Business development (geographical)		S	S	R	A	I					S						S	
Business development (application)	S	R	R	R	A		S		C		S	I			C	S		
Business development (technical)	S	C	C	C	I	A	R		C		S	I			C	S		
Intercompany go to market collaboration		S	C	S	S	R					S						S	
System design	R	A	A	A	I		S	C		S		S			C	S		
Supply documentation	R	A	C	I	S		S		S		S	S			I	C	I	
Commercial tool development	R	S	R	R	R	A	I	S	S		S		S					
Technical tool development	R	A	I	C	I		A		I								I	
Gather and share best practices	S	R	R	A	A	I	S		R		R		S	S		R	C	
Partner capability assessment	S	R	A	C	C	I	I		R		R	A				C	I	
Partner training	R	S	R	S	R	S	S	S		R	S	R	S	R	A		I	
Business review (partner)	S	R	A	C	I	I			S							R	C	
Business planning (partner)	S	R	A	C	C	I	C	I	C	I	S					C	I	
Grow and develop existing Key Account	S	S	R	A	S	C	I	I		S		I		I	C	I	S	
Develop and roll out frame agreements	S	S	R	A	R	A	C	I	C	C	S	C		I	C	I		
CRM Update	S	R	A	R	A	I	I				I						C	
Weekly Report	R	R	I	A	I			S	I		R						C	
Customer visits	R	S	R	A	R	A	S	I	S	I	S		S		C	S		
Material handling	R	S	R	A		I	I	R	I		S		C	C		C	I	
Handling customer complaints	S	R	A	I	C	I	I	S	C		S	S			C	I	S	I
Handling Key account issues/problems	S	S	R	A	C	I	I	S	C		S	S		S	C	I	S	I
Arrange commissioning	R	A	S		I			S			R			S	I	R	A	
MFA	S	S	S	A	I						S		I	I	C	S		

6.2.2 Further Developments to the Communication Guidelines and Its Final Proposal

To the Communication Guidelines two additions were made; one completely new addition and an addition to an existing guideline. The two additions were related to being as a secondary receiver, or “as cc:” of an e-mail. The following guideline was added as a completely new one:

- Add only relevant people as cc: to e-mail communication

The addition was made to the already existing guideline “Highlight needs or actions in e-mails” to include a reference as to who should take ownership of the need or action expressed. The rationale being that if there are many receivers of an e-mail including a need or a need for action, to make sure the correct people actually take action, these people must be addressed separately. The guideline including the addition is below:

- Highlight needs, actions *and ownership* in e-mails

As an example, “Hi all, I really need the component to be redesigned according to the attached guidelines as the customer requires it. Emil, can you see to it that this is done? And Linnéa, can you update the request form for the component? Thanks”. This way, there are no unclarities regarding the needed actions or needs and related ownerships. The highlights do not necessarily mean underlining, bolding or making the text cursive as this can be seen as provocative if made too clear since the one sending the e-mail might not have an actual supervisory status over the receiver. The highlighting in the example is done only by addressing the persons directly by their first name.

As a result of the developments done in the validation stage, the final content of the Communication Guidelines can be seen below in Figure 8, with the changes highlighted.

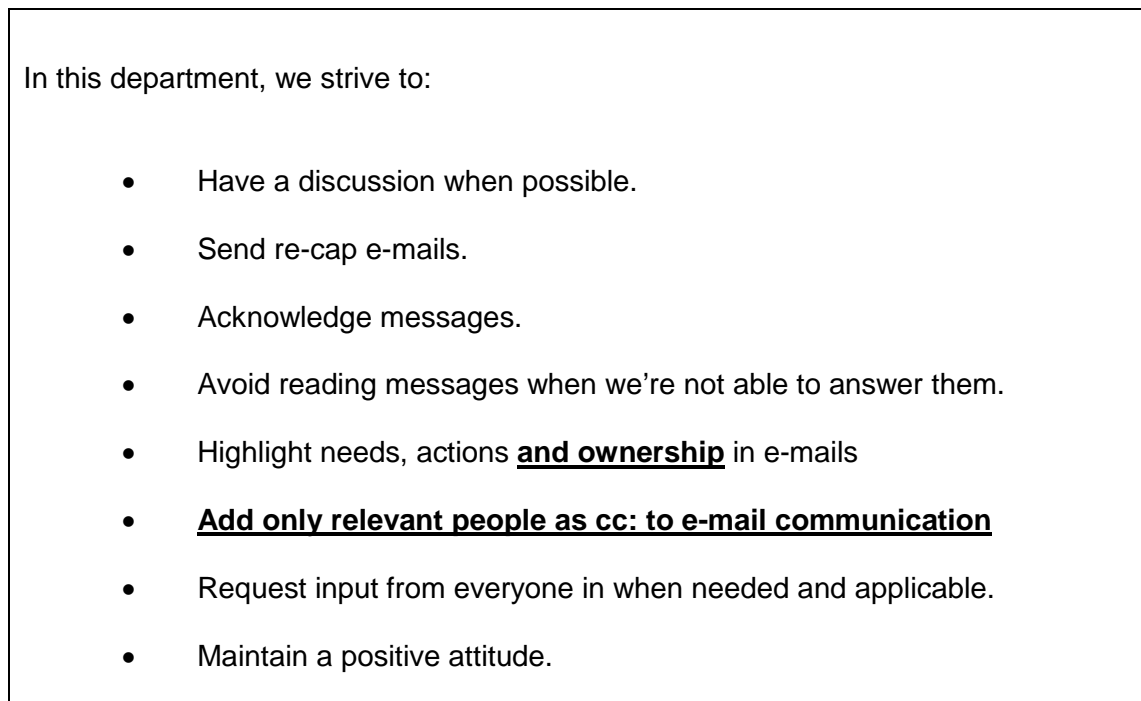


Figure 8. Validated communication guidelines.

The guidelines in Figure 8 will be completed by printing them on an internal template with the company logo and design.

6.2.3 Further Developments to the Ground Rules and Its Final Proposal

To the Ground Rules only one addition to an existing rule was added which was related to the rule

- “We respect the working time”.

As the case department works in international business, different time zones is a reality, and problems can occur globally even after office hours in Finland. This creates the need to be able to contact the stakeholders outside local office hours, if needed, without it being considered a wrong move. The intent of the initial proposed rule might have included the possibility to do exactly that, however, it was not clearly stated.

By changing the rule to “We respect the working time *and consider urgency before making business related contact outside office hours*”, the right is reserved to be allowed to contact relevant stakeholders outside office hours, if it is deemed necessary.

As a result of the developments done in the validation stage, the final content of the Ground Rules can be seen from Figure 9 below:

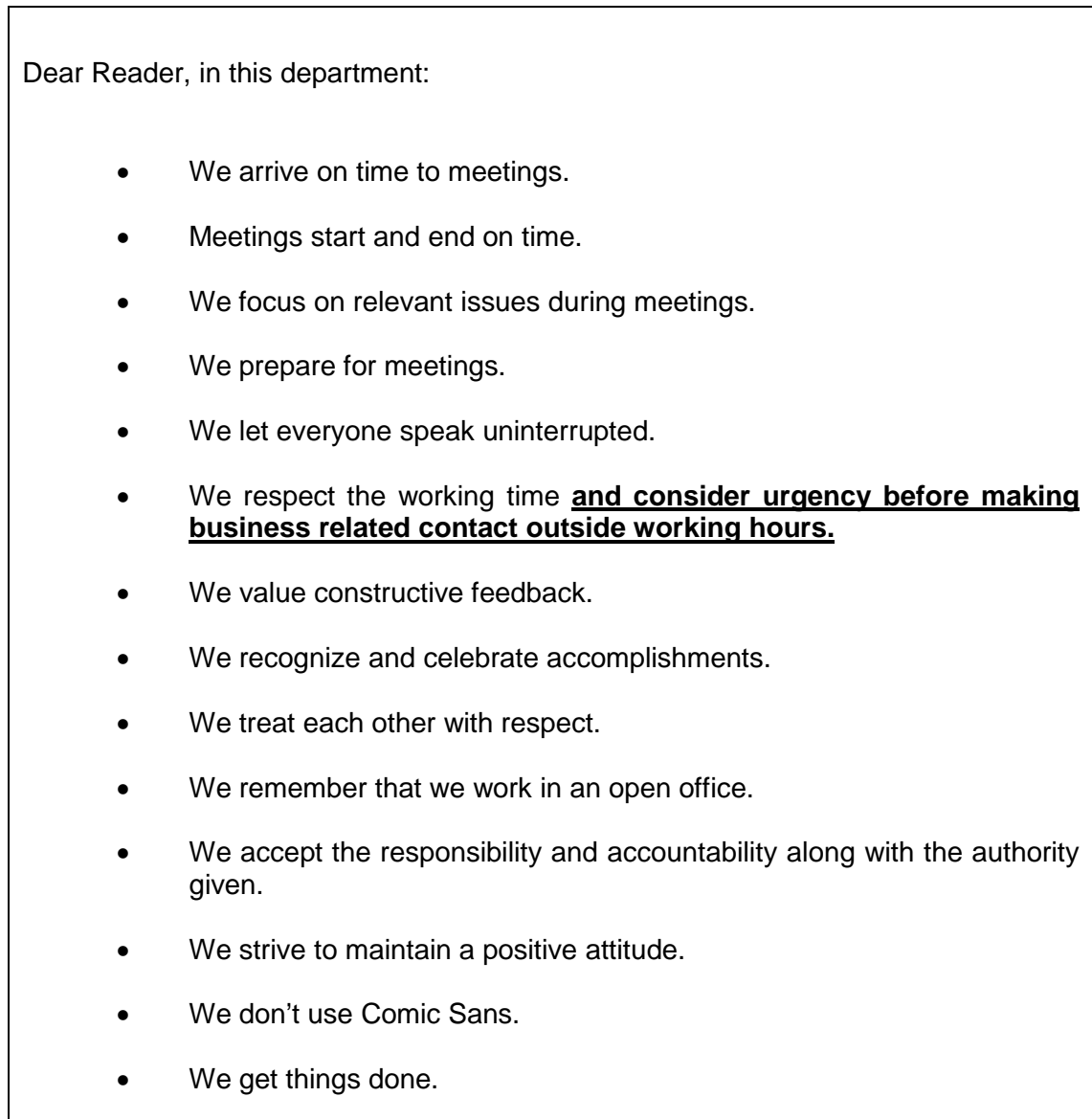


Figure 9. Validated ground rules.

The ground rules in Figure 9 will be completed by printing them on an internal template with the company logo and design.

6.3 Recommendations for Immediate Next Steps toward Implementation

For the validated RASCI matrix, as the next immediate step toward implementation it should be sent to each person in the case department, i.e. all stakeholders involved. A copy of the RASCI matrix should also be put on a suitable wall for all to see.

Next, the owner of the document should be nominated, who will see to it that the RASCI table is in place and updated. Whenever needed, the RASCI matrix can be addressed or assessed by the stakeholders. When needed, the stakeholders are reminded of the existence of the RASCI matrix.

Importantly, the validated RASCI table is not set in stone. If any unclarities arise, these should be discussed and the matrix should commonly be re-iterated.

Additionally, it is recommended that the RASCI matrix is discussed during the periodical one-on-one meetings between the manager and his direct reports that is held multiple times per year. By doing this, the implementation of the RASCI matrix is further enhanced. By actively asking stakeholders to assess and comment the document it becomes alive and an actual tool and support for the department instead of a relic of a past exercise.

As for the validated Communication Guidelines and Ground Rules, they should be sent to all involved stakeholders. As with the RASCI matrix, a copy of the documents should be put on a suitable wall for all to see.

All stakeholders should be asked to sign the documents on the wall as a sign of commitment. When needed, the stakeholders should be reminded of the existence of the documents. Any clear violations of the rules are encouraged to be handled through direct discussion.

The Communication Guidelines and Ground Rules can be actively discussed during the weekly meetings if any stakeholder sees that it is necessary. Alternatively, they can be discussed also during the periodical one-on-one meetings between the manager and his direct reports. As with the RASCI matrix, this would enhance the implementation of the guidelines and rules and in due time, they would be seen as a natural and integral part of the department.

Next, the Thesis discusses the conclusions from the study.

7 Conclusions

This section summarizes the results of the study and discusses the next steps for implementing the validated proposals.

7.1 Executive Summary

The business challenge presented in this study was that there is room for improvement in the division of roles and responsibilities for interaction between the internal stakeholders of the case department. The stakeholders are Sales Engineers, Sales Managers and Key Account Managers. Accordingly, the objective of this study was to clarify and co-define these roles and responsibilities for interaction between the presented stakeholders.

The study was done in several stages and used an Applied action research approach. In the first stage, existing literature was studied to find applicable tools, approaches and concepts to align the stakeholders and to improve the interaction between them. The outcome of this stage was a conceptual framework which in the following stages was applied to the stakeholders as a tool to improve their interaction by focusing on defining the roles and responsibilities for interaction more clearly.

In the second stage, the current state analysis was done through two workshops where the stakeholders assessed the current state of the roles and responsibilities for the day-to-day tasks and interactions within the department. The outcome of the current state analysis was a RASCI matrix which highlighted where the most problematic areas and unclarities regarding the role of each stakeholder in each task. The most unclear role seemed to be the one of the Sales Manager, partly because the two other roles are inherently clearer with the Sales Engineer being a supportive role and the Key Account Manager concentrating on Key Account issues. Part of the reasons for unclarities can be explained by the subjectivity of the RASCI matrix, but not all.

The third stage consisted of several workshops for re-defining the roles and responsibilities for interaction in the case organization. In the first workshops, the stakeholders co-defined the roles and responsibilities for interaction for each task in the case department in an iterative exercise. The outcome of these workshops was an aligned RASCI matrix which all stakeholders agreed on. In a separate workshop, the tools and concepts to

improve interaction based on the conceptual framework was presented to the stakeholders. During the workshop, the stakeholders mutually agreed on which tool or concepts to implement to their department. The tools chosen to be implemented was Communication Guidelines and a set of Ground Rules. The third concept, Team Charter, was chosen not to be implemented. It was seen as useful but not explicitly needed.

In the fourth and final stage of this study, the co-defined proposals was presented to the common manager of the stakeholders for feedback and validation. The proposals were well received and, after implementing suggestions for further developments, the final proposal was reached.

The study resulted in three concrete proposals. First, an aligned RASCI matrix was proposed defining each task requiring interaction between the stakeholders themselves and the rest of stakeholders in the case company. The aligned RASCI matrix clarifies each of the stakeholder's roles within a task, thus enhancing collaboration and improves interaction between the stakeholders. Secondly, the co-created and validated Communication Guidelines were proposed, which set and guide how the stakeholders should communicate with each other, their customers and the rest of the stakeholders of the case company. Thirdly, the co-created and validated Ground Rules were co-defined, which included a set of rules the stakeholders aim to follow to set the tone of the department, to show respect for each other and to set an example for others, both internal and external customers.

By implementing the co-created proposal for improving interaction in the case department, the misalignment due to inefficient or misunderstood interaction between stakeholders, other departments or customers could be mitigated, thus making the departments interactions more effective. Implementation of the co-created proposal for improving interaction began shortly after the completion of this study.

7.2 Managerial Implications

This chapter introduces two recommendations for managerial actions related to the implementation of the proposals.

Changes in interaction between stakeholders should be co-created to create a stronger bond between the changes and the stakeholders. This is more important when changing interaction practices as this is related to how people act in a business (or other) environment towards other people. Enforcing changes the stakeholders might not accept or seen as applicable in the first place can create a hostile environment. By co-creating the changes, the first step of acceptance is taken.

On the other hand, the implementation of co-created changes still requires managerial support, encouragement and guidance. The proposals are quite conceptual and not strongly linked to separate processes. Even though the proposals were co-created by the stakeholders, managerial support is needed to fully implement the proposals.

Therefore, the first managerial action recommended by this study is following-up on the implementation of the co-created outcomes of the study.

Changing only part of a company's practices in interaction only goes so far. Much of the daily interaction is still occurring between departments and not necessarily entirely within departments. Having the all stakeholders of the case company co-create a set of proposals is not viable. A more viable approach would be that the separate departments and teams would create their own set of proposals.

As such, the second managerial action recommended by this thesis is that other managers should reflect their needs for implementing the concepts presented in this study to their departments.

7.3 Thesis Evaluation

The objective of the thesis was to clarify and co-define roles and responsibilities for interaction for the stakeholders within a business department. The outcome did clarify the roles and responsibilities for the different tasks in the form of an aligned RASCI matrix. The aspect of interaction between the stakeholders is however not readily visible simply by looking at the matrix. That being said, the co-created Communication Guidelines and Ground Rules are implemented to allow for a clearer way for interaction between the

stakeholders. In this sense, the objective can be seen as fulfilled. However, pure interaction between any given parties was not analysed in this thesis. This could have provided more depth to the study.

A challenge was that since the interactive RASCI matrix exercise is so subjective, the differences observed by combining the different inputs from the stakeholders is not too reliable and clear trends are difficult to distinguish. However, not all differences can be explained with the subjectivity of the exercise. A different choice of approach for the current state analysis would have probably yielded more tangible trends and pressure points to further study.

One aspect that could have yielded interesting results would have been to group each stakeholders input from the interactive RASCI exercise and compare them to the other grouped inputs i.e. the Sales Engineers inputs would have been grouped and compared to the grouped Sales Managers inputs. This way, it could have been seen clearer what the other stakeholders expect of the other two stakeholders. A triangular comparison chart could have been created so that all stakeholders could have been analysed at the same time. However, it should still be kept in mind that in the end, the matrix was aligned to a single version. Therefore, it is doubtful that the triangular comparison chart would have changed the result from the iterative exercise, and so the end-result, in any notable way.

Given enough time, all the tasks done by each stakeholder during a period of time could have been mapped and compared to a similar period of time after the implementation of the results of this study. This way, the impact could have been measured and analysed to some extent. Now, the actual implementation and follow-up is left undocumented.

The positive or negative roles of interaction as presented in Section 3.3.3. could have been analysed and mapped for each stakeholder. This way, any unwanted behaviours related to interaction could have been identified and eliminated. Similarly, any positive behaviours related to interaction could have been highlighted and enforced. This would have resulted in a purer interactional exercise. As the topic for this study was the roles and responsibilities for interaction, this was not explored more thoroughly.

Next, the set of research criteria also needs to be mentioned to evaluate the quality of research work done in this study. Quality of research can be evaluated using different

research criteria. Four evaluation criteria are typically used to ensure trustworthiness of the research outcome and the research process, they are: internal and external validity, reliability, and logic.

Validity of research can be divided into internal validity and external validity. *Internal validity* assesses if the questions asked or methods used in the study are actually correct and provide an expected outcome to the presented business challenge (Quinton and Smallbone 2006:126-127). A similar evaluation term is *Credibility* which is a measure on how credible and believable the outcome is. To ensure credibility, the researcher needs to make sure that the study is based on the well selected diverse methods, with enough participants and well selected theory input as opposed to being based on single sources, methods or bias in theories. (Denzin, 1970: 315)

In this study, to ensure internal validity i.e. credibility, workshops were conducted in a group of relevant stakeholders. Both in the current state analysis and in the co-creation phase of the initial process, the stakeholders were involved in exploring the topic and co-creating the end-result, that ended in common understanding of the topic and proposed actions. Thus, the intermediate results and final outcomes were scrutinized *during* the process by multiple relevant stakeholders which increases the credibility of the study. If, on the other hand, the study would only have involved a small group of stakeholders this would have reduced the credibility of the study.

External validity assesses how well the outcomes or findings can be transferred and used in other, more or less similar contexts (Quinton & Smallbone 2006: 129).

In this thesis, external validity was ensured conducting the current state analysis and co-creating the proposals with *all* the stakeholders within the department. However, the outcome might not fully be applicable to other departments. As it can be assumed that most, if not all the departments in the company are different, or at least involve different day-to-day tasks, part of the *outcome* (the RASCI chart) cannot be applied directly to any given department. However, the *conceptual framework* that was used to reach the objective can be used by other parties. The other part of the outcome (Communication Guidelines and Ground Rules) can be used, at least as a starting point, by other parties.

Reliability is a research evaluation criterion based on replication of results, in other words if the same results would be obtained if the study was conducted again, whether by the

same researcher or by someone else (Quinton & Smallbone 2006:129). In qualitative research, this can be problematic as the answers or input given by the informants can change either by the influence of external factors, or by different conclusions regarding the topic between the two points of data extraction. Reliability of a study can be achieved by showing that the researcher has not misinterpreted or carelessly recorded or analysed the data. (Carcary 2009:14)

In this thesis, reliability is ensured by conducting workshops where the outcomes are seen and reviewed by the stakeholders during the events. In the second workshop (interactive RASCI matrix) the end result is not readily visible to the participants in the end of the workshop and misinterpretation of data could occur. However, the outcome is presented during the following workshop. The researcher will not actively participate in creating data. Most of the data will come from the stakeholders. As the researcher is a stakeholder as well, some data will, at least partly, be influenced and created by the researcher. Still, this will take place mostly during the last workshops where the outcome is visible to all participants and so, the negative effect on the reliability of this on the study should be minimal.

Logic is defined by Merriam-Webster (2019b) as “something that forces a decision apart from or in opposition to reason” i.e. the ability to make clear and understandable arguments for the decisions made. Logic can be established by ensuring the validity and relevance of the study. In this thesis, logic was also established by building a logical research design (Figure 1, Section 2.2) before conducting the study.

7.4 Closing Words

In the competitive environment nearly all business is tough. Competitive edge can be achieved partly by being able to seamlessly provide correct and timely support to the customer. This edge cannot be achieved while fighting internal battles due to poor internal communication practices, either within or between departments. Accordingly, to increase both customer and employee satisfaction, structures to enhance internal interaction, internal communication and internal collaboration must be in place. This study was done in hope to help the case organization of the research to improve in both internal and external interaction in such way as to gain and capitalize by this competitive edge that seamless interaction provide.

References

- Augustine, S. and Cooper, C. (2009) "Getting the Most from Strategic Partnering: A tale of Two Alliances", *Organizational Dynamics*, Vol. 38, No. 1, pp. 37-51
- Brownlee, D. (2012) "Team Charter", *Leadership Excellence Essentials*, 29(10), p. 15. Available from: <http://search.ebscohost.com.ezproxy.metropolia.fi/login.aspx?direct=true&db=bsh&AN=82954286&site=ehost-live> [Accessed 7.03.2019]
- Cadle, J., Paul, D. and Turner, P. (2014) *Business Analysis Techniques: 99 Essential Tools for Success*, BCS Learning & Development Limited, Swindon. Available from: ProQuest Ebook Central.
- Carcary, M. (2009) "The Research Audit Trial – Enhancing Trustworthiness in Qualitative Inquiry." *The Electronic Journal of Business Research Methods* Volume 7 Issue 1 2009, (pp.11 - 24), available online at www.ejbrm.com
- Chaneski W. S. (2009) "What are Your Team's Ground Rules?" *Modern Machine Shop*; Sep 2009; 82, 4 ABI/INFORM Collection pp 34-35.
- Coman, A. and Ronen, B. (2009) "Focused SWOT: Diagnosing Critical Strengths and Weaknesses", *International Journal of Production Research*, 47(20), pp. 5677–5689. doi: 10.1080/00207540802146130
- Denzin, N.K. (1978) *Sociological Methods*. New York: McGraw-Hill.
- DRM Associates (2016) NPD Solutions: *Team Groundrules*. Available from: <http://www.npd-solutions.com/groundrules.html> [Accessed 25.03.2019]
- Hill, N.S. and Bartol, K.M. (2018) "Five Ways to Improve Communication in Virtual Teams." *MIT Sloan Management Review*, vol. 60, no. 1, pp. 1-5.
- Holt, J. (2009) "A Pragmatic Guide to Business Process Modelling", 2nd ed. London. BCS Learning & Development Limited
- Huhta, M. (2007) "Connections: Communication Guidelines for Engineers." Helsinki. Edita.
- James-Tanny, C., Huettner, B. and Brown K. M. (2010) "Managing Virtual Teams: Getting the Most from Wikis, Blogs, and Other Collaborative Tools." Jones & Bartlett Learning
- Johnston, A. (2014) "Rigour in Research: Theory in the Research Approach", *European Business Review*, Vol. 26 Issue: 3, pp.206-217

- Kananen, K. (2013) "Design Research (Applied Action Research) as Thesis Research: A Practical Guide for Thesis Research." JAMK University of Applied Sciences
- Merriam-Webster (2019a) Merriam-Webster.com, "interaction" Available from: <https://www.merriam-webster.com/dictionary/interaction> [Accessed 14.04.2019]
- Merriam-Webster (2019b) Merriam-Webster.com, "logic" Available from: <https://www.merriam-webster.com/dictionary/logic> [Accessed 11.03.2019]
- Miles, M. B. and Huberman, A.M. (1994) "Qualitative Data Analysis: An Expanded Sourcebook". Thousand Oaks, CA: Sage Publications
- Peters J. (1999) "Ground Rules in Team Working", *Team Performance Management: An International Journal*, Vol 5 Issue: 4. Available from: <https://doi.org/10.1108/tpm.1999.13505daa.001> [Accessed 05.02.2019]
- Quinton, S. and Smallbone, T. (2006) "Postgraduate Research in Business. A Critical Guide." Sage Publications.
- Morgan, R. (2008) "How to Do RACI Charting and Analysis: A Practical Guide." Project Smart. Available from: www.projectsart.co.uk [Accessed 20.1.2019]
- Solomon, C. (2015) "RACI solutions; Teams that Work", Wynnebrook Manor: The New Group Consulting, Inc.
- Storbacka, K., Ryals, L., Davies, I. A. and Nenonen, S. (2009) "The Changing Role of Sales: Viewing Sales as a Strategic, Cross-functional Process." *European Journal of Marketing*, 43(7/8), 890-906
- Watenpaugh, N. (2018) "How a Team Charter Paves the Way to Collaboration Success", HR.COM, Aurora. Available from: https://www.hr.com/en/magazines/all_articles/how-a-team-charter-paves-the-way-to-collaboration-ifusdm1h.html [Accessed 10.4.2018]
- Wilkinson N. L. and Moran J. W. (1998) "Team Charter", *The TQM Magazine*, Vol. 10 Issue: 5, pp. 355-361

Team Charter Template

1. Team charter		
<input type="checkbox"/> Project		
<input type="checkbox"/> Task force		
2. Team Name:	3. Version:	4. Subject:
5. Problem/opportunity statement:		
6. Strategic alignment:	7. Team leader:	
8. Team sponsor:	9. Team facilitator:	
10. Team members:	Area of expertise:	
1. _____	_____	
2. _____	_____	
3. _____	_____	
4. _____	_____	
5. _____	_____	
6. _____	_____	
7. _____	_____	
11. Performance improvement AIM (mission):		
12. Scope (Boundaries):		
13. Customers (primary and other):	Customer needs addressed:	
_____	_____	
_____	_____	
14. Objectives:		
✓ _____	_____	
✓ _____	_____	
✓ _____	_____	
15. Success metrics (Measures):		
16. Considerations (assumptions/constraints/obstacles/risks):		
17. Team member time commitments:	18. Available resources:	
_____	_____	
19. Key milestones: _____	Date: _____	
_____	_____	
20. Communication plan (who, how, and when):		
21. Key stakeholders:	Area of concern (as it relates to the charter):	
_____	_____	
_____	_____	

(Wilkinson and Moran 1998:357)