

Essi Partti

# Order Delivery Process instructions

Guidelines and documenting

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<p>Order delivery systems and functions can differ greatly between companies and within the company's different divisions. For the customer to receive the greatest benefits, instructions are needed to support the ordering process. Instructions enable to unify the operations. With thorough instructions both the company and the customer benefit.</p> <p>The purpose of this thesis was to improve existing Order Delivery Process instructions for Company X. The written report of the thesis will focus on creating the guidelines and documenting them. Project goal is to create updated, clear instructions which provide information and support the order handler. The instructions are also expected to be used in training.</p> <p>The research was conducted as a quantitative and qualitative study. The quantitative method was the main method used. The quantitative study was performed in the form of a survey. To deepen the research a qualitative method was used in the form of an interview. The focus was on the current instructions and the quality.</p> <p>The findings suggested that the over-all satisfaction toward the instruction were at a good level. Despite the good result the need for updated instructions was emphasizes from some of the survey respondent as well as the interviews.</p>	
Keywords	Instructions, value to the customer, customer interface, process mapping

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## 2 Introduction

The process started due to the demand for updated Order Delivery Process- instructions (ODP). The focus group for the instructions is local Sales Unit (SU) order handlers. The original ODP was Microsoft Power Point- based and was considered to be too heavy for that particular format. The target is to create updated instructions.

The goal of improving the instructions is to increase the number of 'perfect'-orders. This enables to offer better value to the customers and improving the efficiency within the Production Unit (PU). Customers can be considered to be both the SU's and the End Customers. The ODP instructions can also be used for training purposes for both local SU's and for the Sales Administrators at the PU. In training the instructions are planned to provide sufficient information for the trainee to support the order creation. In addition the ODP provides a memory tool for the everyday ordering process.

Improving the instructions enables faster order processing which can then affect the entire production process. As the orders are created as 'perfect' it can also minimize any additional costs which might occur due to check up's and corrections within the order process in the PU. The actual product lead time can be shortened and On-Time Deliveries (OTD) can improve due to the sufficient information provided in the order. In case the order is created on the SU as 'perfect' this enables the orders to go into automatic order handling in the system and the order confirmation will be visible within 5 seconds. The fast automatic order can be seen as a direct benefit to the customer. Imperfect orders are handled manually by the PU Sales Administrators.

The instructions are operated and improved in the customer interface, within the PU Sales Administrator- team. The team is targeting both the PU benefits as well as the customers. The PU Sales Administrators first priority is customer orientation and satisfaction.

Due to the tough competition in the markets, updated and clear instructions are what enable the PU to offer shorter lead times for the end customers. While the actual lead time shortens, customers receive more value and sales numbers can be assumed to increase.

The preliminary feedback from the updated instructions is not expected to be high in quantity. The actual effects of the instructions will become clearer once the ODP instructions are distributed and adopted by the SU's order handlers. The actual benefits and the functionality of the ODP are expected to be visible by the end of 2015. The initial expectations are high in term of benefits. Many of the stakeholders are expected to experience the updated ODP results as quickly as SU's or the PU Sales Administrators.



### **3 Company introduction**

Company X is a multinational organisation which has Sales Unit offices in many different countries. The business consists of multiple different divisions which are divided based on customer segments and industries. Strong customer service has been recognised as a value function in order to strengthen the customer satisfaction.

## 4 Important concepts and theories

### 4.1 Subject matter expert

The instructions are created at the customer interface and utilized by PU Sales Administrators; the responsibility of the instructions is within the same team. The PU Sales Administrators are in daily contact with the SU's and have a high level of understanding when it comes to the content. Inaba et al. (2004: 90) states the importance of assigning the technical responsibility to a subject matter expert, and the writing and presentation responsibility to the writer. Often the subject matter expert has some good insights about the user population but some misconception as well. The writer also frequently detects technical problems while developing the instructions, yet generally is dependent on the subject matter expert for technical details. Noticing and developing the instructions is on a very pro-active level and this enables the operations to improve and generate more detailed instructions.

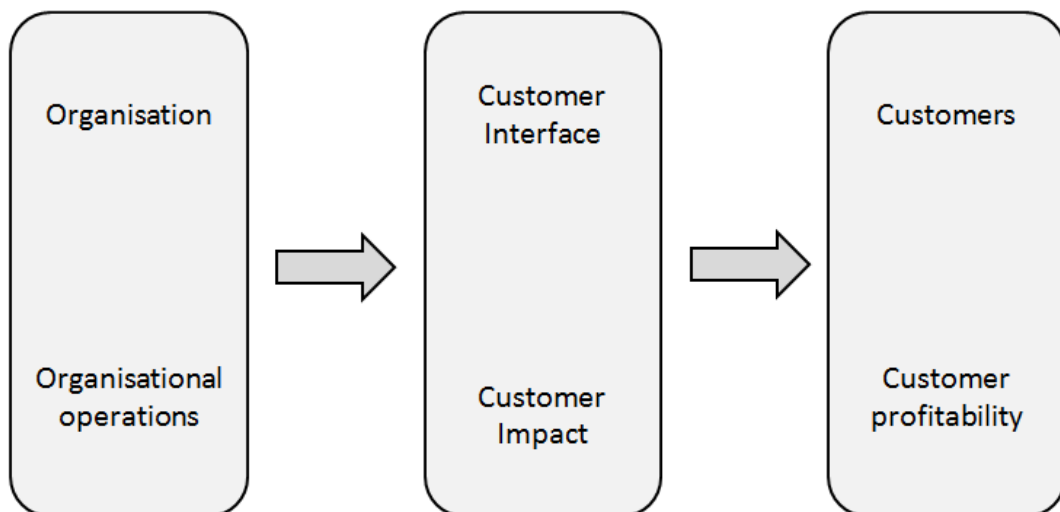


Figure 1 Customer Interface

The knowledge of customer interface could be utilized in order to develop. Encountering the customer emphasizes how strategic management is customer driven. Employees in the customer interface are likely to understand the customer and quickly influence the customer experience.

By creating consistently extraordinary experiences at the customer interface, an enterprise can easily distinguish itself from other enterprises. Customer interface is a highly leveraged place to invest, since the systems and people dealing directly with customers create expectations, get feedback on products, and services, and solve problems (Peppers & Rogers, 2004: 184).

Eden and Ackermann (2013: 95) provide an example that if the managers asserts that 'customer loyalty is the result of developing long term personal relationships with particular individuals' and that 'helping the customer solve problems is one important aspect of getting the right relationship instead of always treating the customer to sales pitch, as some of our less intelligent sales staff do.

The operational process should be examined through customer orientation – through the customer's eyes. The process then starts from the customer's needs and ends up in customer satisfaction (Hannus, 2003: 49).

## 4.2 Strategic Management process

Strategic Management process will be one of the methods used when utilizing the peer evaluations from the Sales Administrators. Analyzing, Formulating, Implementing and evaluating the changes made to the instructions is an ongoing and processed through as long as needed.

### 4.2.1 The Resource-Based View

The Resource-Based View (RBV) explains that a firm's resources are most important in getting and keeping a competitive advantage. Coulter (2013: 30) states that there are some key assets that can give a firm a competitive advantage. The resources include all the financial, physical, human, intangible and structural/cultural assets. Human resources include the experiences, characteristics, knowledge, judgment, wisdom, skills, abilities and competencies. Structural / cultural resources include the history of the organization, culture, work systems, organizational policies, working relationships, level of employee trust and the formal structure in use. Both human resources and structural/cultural resources can be tied to the training aspect of sufficient and clear instructions.

According to Coulter (2013: 31) the value addition means the resource can be used to exploit external circumstances which are likely to bring in organizational revenues or that it can be used to neutralize negative external situations likely to keep revenue from flowing in. Since the Company X has placed importance to good customer service levels it can be argued that sufficient instruction are a value adding resource. SU's are encouraged to create as perfect orders as possible to improve the actual lead time from order creation to order dispatch from factory.

RBV considers the need to look inside the organization for the unique resources and capabilities that can be exploited (Coulter, 2010: 34). Both internal and external views are considered to come up with strategies that have a chance of creating a sustainable competitive advantage, even just for a short period of time. This way the resources can be matched with the changing external circumstances. Since external environment is continually changing the competitive advantage can be found from different places depending on the time. The trick is to continually analyze both internal and external environments and taking the advantage of any positive changes within the organization's unique resources and capabilities.

#### 4.2.1 The Guerilla View

The Guerilla View is based on instability. According to Coulter (2010: 34) the environment is characterized by continual and often revolutionary changes. Disruptions in technology, market instabilities and other type of unpredictable changes challenge strategic managers' at creating a sustainable competitive advantage. A successful organization must rapidly and repeatedly disrupt the current situation and radically surprise competitors. New competitive advantages are based on the changing context. The key is to analyze both external and internal environments and taking advantage of any positive changes.

#### 4.3 Value chain

The importance of clear instructions can be argued to affect various stakeholders. Not only do instructions affect the outbound logistics, it also has an effect on Operations, Inbound Logistics, Marketing & Sales and Services (Coulter, 2010: 108). According to

Lynch (2006: 203-204) Porters Value Chain model (as seen below simplified) the added value of each part of the organization contributes to the whole organization and the contribution to the competitive advantage of the whole organization that each of the parts might make. Operations, Inbound Logistics, Marketing & Sales, Outbound Logistics and Services are also known as primary activities. The value chain model does however only work with existing structure, and will not be a comprehensive means to achieve competitive advantage.

In Porter's model the value the company creates is based to what customers are ready to pay for the products and services. The operations are profitable if the produced value exceeds the operational costs (Hannus. P52).

Value chain is a linked set of value-creating activities beginning with basic raw materials coming from suppliers, moving on to a series of value-added activities involved in producing and marketing a product or service, and ending with distributors getting the final goods into the hands of the ultimate consumer (Satya Sekhar, 2010:115)

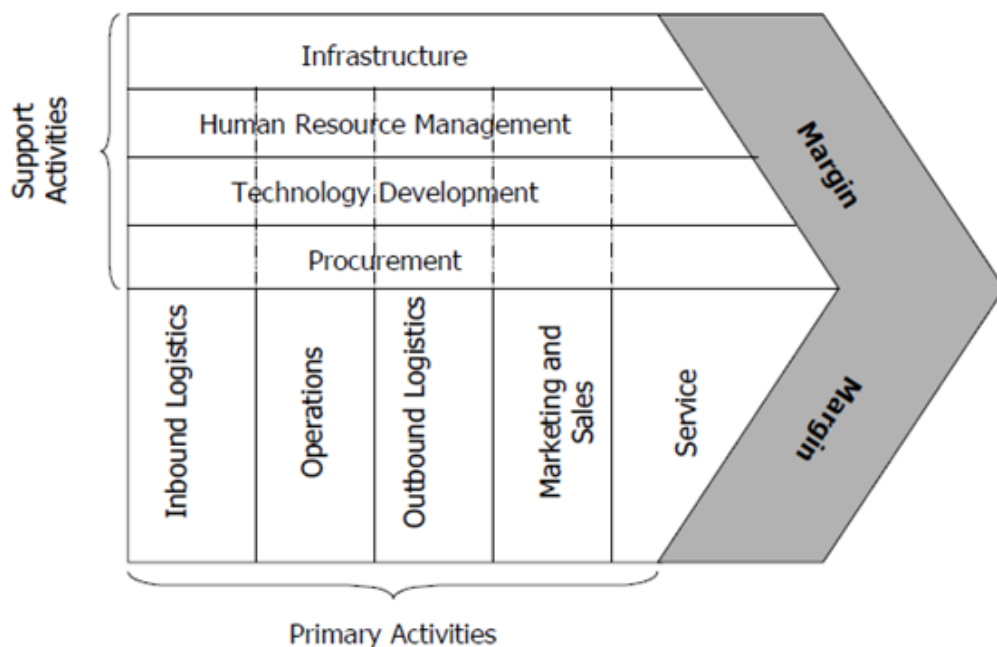


Figure 2 Porters Value Chain (source. Strategic Management Insight)

A company is split into primary activities of production, such as production process and the support activities such as human resources management that gives the necessary background to the running of the company. The activities cannot be identified with any individual part (Lynch, 2006: 203).

Primary activities are split into upstream and downstream activities. The following explains how the company's functions are distributed within the primary and support activities.

Support activities include infrastructure, Human Resource Management, Technology Development and Procurement. Primary activities are split into two categories; upstream and downstream activities. The five value generating primary activities are Inbound Logistics, Operations, Outbound Logistics, Marketing and Sales & Services. Inbound Logistics and Operations are upstream activities and Outbound Logistics, Marketing and Sales & Services are downstream activities.

Inbound logistics:

- Technology
- R&D
- Product features
- Product performance
- Quality

Operations

- Purchasing
- Productivity
- Economies of Scale
- Capacity
- Assembly
- Material flow
- Quality management

Marketing & Sales

- Distribution
- Prices
- Communication
- Technical Literature
- Packaging

- Brand

#### Service

- Sales force management
- Logistics
- Terms of sale
- Delivery
- Term of payment
- Inventory
- Customer service

This traditional structure has been used by business leaders for the past hundred years. The traditional focuses on the firm creating the value. Firm provides offerings through products and services and customer represents the demand for the products and services. According to Lync (2006: 203) the value chain links the value of the activities of an organization with its main functional parts. It then attempts to make an assessment of the contribution that each part makes to the overall added value of the business.

According to Prahalad & Ramaswamy this firm-customer interface has long been the locus of the producer's extracting economic value from the consumer. Managers focus on the "value chain" that captures the flow of products and services through operations that the firm controls or influences. The decisions on what to make, what to buy from suppliers, where to assemble and service products, and a host of other supply and logistics decisions all arise from this perspective. In the traditional system the operations are internally consistent. If the firm creates value, then the value creation process is separate from the market. Matching the supply and demand has been the core of the value creation process. The traditional structure does not however consider the vast range of products and services offered today. Consumers with new interactions and connection tools are interested in creating and co-creating value. The co-creation and interaction concerns firms, communities, professionals, service providers and other consumers. It is becoming difficult for companies to create value without the engagement with the customers (2004: 7-16).

#### 4.3.1 Co-creation of value

Prahalad & Ramaswamy state that the new starting premise is that the consumer and the firm co-create value, and so the co-creation experience becomes the very basis of value. The value creation process centers on individuals and their co-creation experiences. Managers must attend to the quality of co-creation experiences, not just to the quality of the firm's products and processes. Quality depends on infrastructure for interaction between companies and consumers, oriented around the capacity to create a variety of experiences (2004: 14).

Co-creation is not transferring our outsourcing activities to the consumer or a marginal customization of products and services. Customer events around the firm's offerings are not considered as co-creation either. The traditional company-customer interactions no longer satisfy most consumers today. The market begins to resemble a forum organized around individuals and their co-creation experiences rather than around passive pockets of demand for the firm's offerings (Prahalad & Ramaswamy, 2004: 16).

Dialogue between the firm and customer since it provides understanding in emotional, social and cultural context between experiences. Dialogue creates and maintains a loyal community (Prahalad & Ramaswamy, 2004: 23).

According to Hellman & Värilä (2009: 16) the company, products and customer are in strong correlations with each other. A change in one affects the other two.



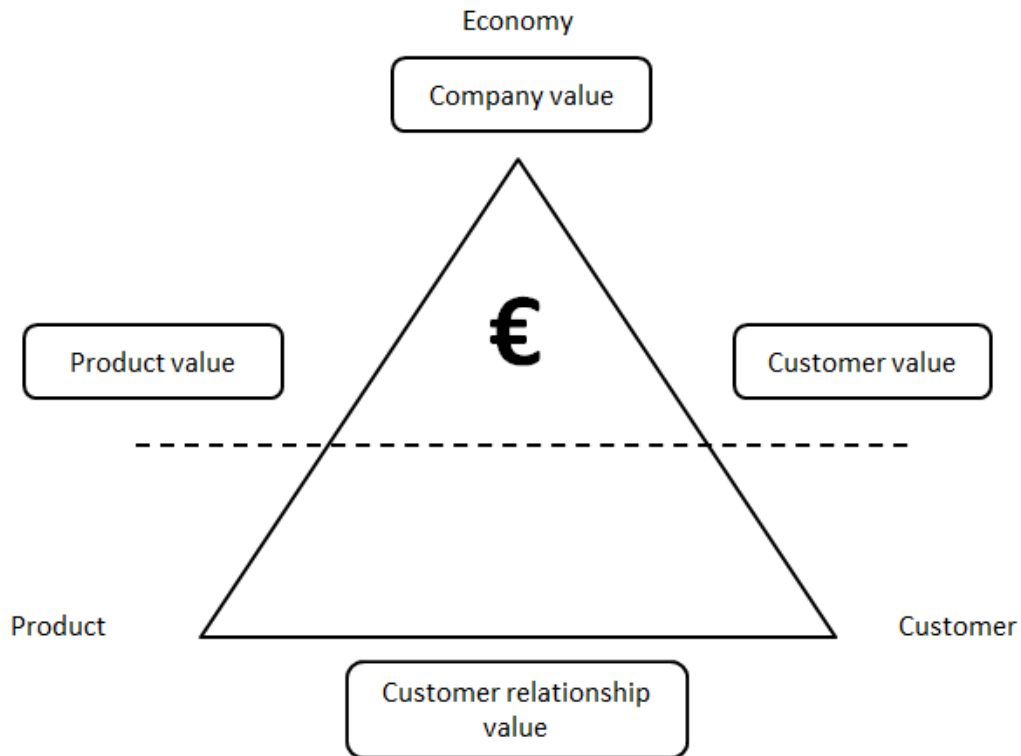


Figure 3 Management perspective

In the modern organization everyone involved with the customer wants to utilize both enterprise-level holistic and functions customer knowledge in their own activities Only through this are functional coherence and efficiency born which the customer appreciates. Improving and utilizing the management information and management tools requires coordinated and uniform measures from all functions. Each function has its own basic function (Hellman & Värilä 2009: 58). For the PU Sales Administrators the basic function is to operate closely with the global SU's who are in direct contact with the end customers.

The value creation is a process by which organizations transform inputs into goods and services that are worth more than the sum of those inputs (Magretta, 2012: 221). Magretta suggests that the value proposition is the element of strategy that looks outward at customers, at the demand side of the business. The value chain focuses internally on operations. Strategy is fundamentally integrative, bringing the demand and supply sides together. Value proposition is the element of strategy which outward at customers at the demand side of the business. A value proposition reflects the choices about the particular value the company will offer (2012: 97)

#### 4.4 Lean

The Lean thinking has become a popular concept of value as perceived by the customer and defined by the performance of the product. The Lean thinking principles are the pursuit of perfection, definition of customer value, identification of value streams & the removal of waste, organization to achieve superior flow of goods in production, response to pull from customers through the supply chain (Lynch, 2006: 326). From the principles, especially the superior flow of goods in production and response to pull from customers are what can easily be supported by creating the perfect order and hence avoiding last minute disruptions.

Capacity planning, forecasting, prognoses, performance targets and productivity are familiar to most production companies, but the administrative sector does not have the same tradition of actively planning and controlling the task flow. This is partly because administrative tasks are not structured and because organizations tend to be function based, with each function approaching the world from its own perspective (Eriksen et.al, 2007: 45).

## 5 Challenges

Once the ODP instructions are distributed, any additional changes will need to be informed to the SU's separately. The method of how to perform this is still unclear and requires analyzing on which method would be most efficient and clear.

The SU's are spread out in various countries within multiple continents. The wide variety of cultures and backgrounds challenge the clarity and comprehensiveness of the instructions.

According to Inaba et.al the users should be identified in terms of literacy level, level of knowledge about the general subject matter, and work environment (2005: 91). The instructions are targeted for the SU order handlers with sufficient knowledge about the products. The literacy level can be considered high. The instructions can focus on the ordering operation itself. The updated ODP is planned to include details concerning the ERP system used by the SU's.

Since the business is global the instructions need to consider this. The official business language is English which is mandatory for all employees. The level of English does however vary. Due to the official language not being the mother tongue for many, the instructions should not contain any unnecessarily complex or challenging word choices

## 6 Constraints

The primary goal in managing project constraints is to either remove or minimize the differences between the project objective and the project plan. Project constraints are scope, schedule and resources. Some constraints should be accepted since removing the constraints is not always possible. Understanding what the constraints and priorities are, and how they are determined enables to determine the approach. Every project requires least one freedom. It is unrealistic to manage all constraints of the project prior to completing a thorough analysis of the required work (Kendrick, 2009: 128–129)

There is one acknowledged constraint with the project, time. The ODP instructions are expected to be ready during spring 2015. The time constraint is not however too short. Time-wise the instructions are expected to be ready during spring 2015 which provides around 4 months for the creation and documenting of the instructions. The information needed for the creation is accessible for the PU Sales Administrators. Printing the booklet will create costs which have not yet been identified. The benefit gained from the instructions is considered to be greater than the cost and shipping of the booklet. The cost of the booklet is not however an obstacle for the project.

## 7 Research methods

For this thesis both qualitative and quantitative research were used. The qualitative research was performed by conducting interviews to the in-house customer interface as well as part of the survey sent to the SU's.

Originally the SU's were approached by an informal interview questions. The interview can be seen in Appendix 3. The rate of responses for the qualitative interview for SU's was expected to provide sufficient amount of data. None of the recipients replied. The response rate being zero, suggested that the creation of the qualitative interview and approach were not successful. The interview needed to be re-created with a new strategy and approach. Since the SU order handlers are also ordering from other Company X divisions, an interview with very broad questions might not encourage responding. The new research method strategy was decided to be performed as a survey. The survey was created to be short and simple and taking only a few minutes of the respondent's time.

The request for the instruction update came from the employer. There were certain time limitations set, since the updated instructions were expected to be ready during spring 2015. The project is performed aligned with the everyday work which creates some excess time constraints. Due to the constraints no extensive survey was performed.

The survey was created partially to consider the types of issues and questions the SU order handlers send to the PU Sales Administrators. The enquiries related to the instructions also provide a good insight on what topics and parts are unclear or which can be interpret in different ways.

The aim of this project is to improve and clarify the instructions provided to the local SU's. The topic of this study was relatively easy to examine; yet activating the local SU personnel to respond to the survey seemed to become more challenging than thought. The survey was originally sent out with wide e-mail distribution. This approach rather quickly proved to be ineffective since no responses were received. Another attempt

was gathered by simplifying the survey to as short and simple as possible. The survey was sent to each SU order handlers personally by e-mail. The current ODP instructions were sent as an attachment in case some of the recipients were not familiar with ODP. This has proved to be the case with some long-term SU order handlers. Sending the ODP instructions as an attachment was an aim to minimize the uncertainty of the survey topic. Another reason was to again familiarise or in some cases potentially introduce the instructions. The SU feedback is vital since they are the ODP target group and are expected to use the instructions the most.

The PU Sales Administrators also provided peer evaluations and comments during the project. The instruction creation requires multiple evaluation rounds (in order to cover all needed aspects). The process will start with analyzing the existing instruction and utilizing the know-how gathered based on the SU operations. Analysis, Formulation, Implementation and Evaluation will be an on-going process until the final version is published. The strategy does not however finish since the process is in need of auditing and evaluation to keep up with the changing operations.

Validity and reliability are research evaluation criteria's. Reliability is referring to repeatability of the research. Other researches should be able to repeat the research and produce similar conclusions.

### 7.1 Quantitative & qualitative methods

Research methods are systematic, focused and orderly collection of data for the purpose of obtaining information from them, to solve/answer a particular research problem or question (Ghauri & Gronhaug 2005: 109). The data collection can be divided into two main groups, qualitative and quantitative research. The research methods choice depends on the research question as well as the purpose of the study. The decision whether to use qualitative or quantitative method or to use both methods should be weighted.

In this study both methods, qualitative and quantitative, are used. For the first part quantitative method was chosen. The quantitative method was performed as a survey. For the second part a qualitative method was chosen in the form of interviews.

Qualitative research allows the respondents to express their observations about the research case. Qualitative research typically answers research questions such as “what”, “how” and “why”. The questions aim to describe situations, explain processes and consequences. Planning the research is important, although the research might not progress according to the research plan (Hennink et.al, 2011: 10).

Qualitative research is a circular process which demands movement between the research ideas. Normally interviews are social interactions, however due to the time constraints a written interview was performed. The interviews provide flexibility and arguments to opinions.

The procession of the research data includes analysis and synthesis. Analysis is classifying the data and synthesis is creating a general view and presentation of the research topic in a new perspective.

## 7.2 Data collection

The data collection for this study has been collected for this particular study and is referred to as primary data, and the secondary data is the data collected by others. For this thesis both primary and secondary data was used. Secondary data was used in the form of relevant theories and concepts (Jain et.al 2010-2011: 14-15). Primary data was collected in the form of survey and interviews. According to Ghauri & Gronhaug the main advantage of primary data is that they are collected for the particular project at hand. This means that they are more consistent with our research questions and research objectives (2005: 102).

## 7.3 Response rate

The survey was sent to 31 potential respondents in 23 different SU's. From the respondent 21 people (64%) replied. The response rate 64% can be considered to be reasonable response rate for this study.

### 7.3.1 Survey

The survey was not performed anonymously. Since the respondents were chosen from the existing contacts, approached personally and the responses potentially providing them assistance and improvement for their instructions the anonymity was not considered to be necessary. The decision appeared to be correct.

The non-anonymity was not an issue for the participants since the project will improve the instructions used by the SU's. The survey was conducted by e-mail.

In the survey, firstly a population should be defined. Due to the case study setting the population was the global SU order handlers. The target group is multicultural. The native language varies between the respondents. All have basic English skills. By population is referred to as the people who are of interest of this study.

In this survey only a sample of population was used. Sample of population means that only a selection of the population of interest is used for the survey is used. The reasons behind the choice were based on the response rate (0%) of the first qualitative interview distributed. The original plan was to include the entire population of interest, yet after no replies were received from the first qualitative interview a new approach was chosen.

The sample population was chosen on the basis of location and random selection of the SU order handlers. Firstly, the SU locations were listed and made sure the survey was sent to all continents. Secondly, from the list of SU's within a continent the sample population was chosen randomly in order to collect the data.

Since all SU order handlers have e-mail access, the survey was chosen to be sent via e-mail. An online survey was a considered option on how to distribute the survey. Due to the time constraints the SU order handlers were considered to have, it was decided the survey would be written into the e-mail to which the respondent could reply and send the responses by simply replying to the sent e-mail. This also enabled the respondent to have a copy of the attached instructions in their e-mail.

In this case email was also considered to provide the maximum response rate. Another point considered was the fact that during the time of the survey the SU's had another survey sent concerning the service levels. The other survey was online based. These



two surveys should not be mixed within each other, which strengthened the choice of e-mail distribution.

The aim of the survey was to receive opinions and feeling about the current ODP instructions.

In order to maximize the response rate the amount of questions were planned to be kept as few as possible. The questions were created by including 8 questions with numerical answers. One question concerned the geographical location. Two questions were open-ended which enabled the respondents to reply in more detail. The main focus was on the first 10 questions, since applying the numerical values was considered to receive the highest number of responses. The two open ended questions were considered in a way as a bonus. Not all the respondents were expected to reply to the open ended questions.

The numerical values were set to range from 1 to 5. Value 1 was in all questions handled as the worst grade. Value 5 was valued as the highest grade. For the recipient the response time was advertised to be maximum 5 minutes. This proved to be a good advert since many of the sample population replied within 30 minutes after the survey was distributed.

The survey focused on the location, experience within the ODP, clarity, job performance support, level of instruction update, terminology and over-all grade of ODP.

The survey was sent out February 10<sup>th</sup> 2015. The recipients were given 7 days to reply. Most responses were received within hours of the distribution. After a few days passed in was noticeable that the more days passed the less infrequent the responses became. Based on the occurred response times the seven day reply time appeared to be sufficient. The decrease of responses after a few days was most likely caused due to the high e-mail intake within the SU order handlers. Once the e-mail in question is no longer in sight the likelihood of remembering to reply increases.

### 7.3.2 Interviews

In addition to the survey, interview questions were sent out to the PU Sales Administrators who receive the created orders made by the SU order handlers. Due to the time constraints the interview was conducted by e-mail.

PU's Sales Administrators were provided the possibility to comment and suggest improvements. Each individual within the group were able to read and evaluate the instructions and comment their finding and feelings. They were also able to suggest ideas during the process.

The interview was semi-structured. Some of the questions were set to seek an answer to a particular section. The interview also provided two questions where the respondent was able to include any ideas and comments freely. The questions can be found from the Appendix 2.

## 8 Findings and analysis of the results

Both the survey and the interviews will be reviewed in this section of the thesis. The findings will be displayed as percentages, cross tables, correlation and averages. The figures are used to visualize the findings.

### 8.1 Survey result

The findings of the survey were analysed using Microsoft Office program Excel. Excel was used in various different ways. The analysis tools and functions used included charts, percentage, PIVOT charts, correlations and averages.

#### 8.1.1 Respondent profile

The first survey question concerned the locality of the respondent. The locality of the respondent is the only question concerning personal details. The respondent provided the country of residence, which were then re-grouped to continents.

##### Question 1: Country

The respondents were distributed between 19 different SU's. Only from one SU the survey received two responses. From the other 18 SU's one recipient responded from each. The respondents were requested to inform their location by country. This was to emphasize the survey was distributed globally as well as to analyze if there are any differences to the response rate when compared the locations.

Based on the responses from question 1, the respondents were categorized further to group the countries into continents. The purpose of grouping into continents is to display how the responses were distributed globally.

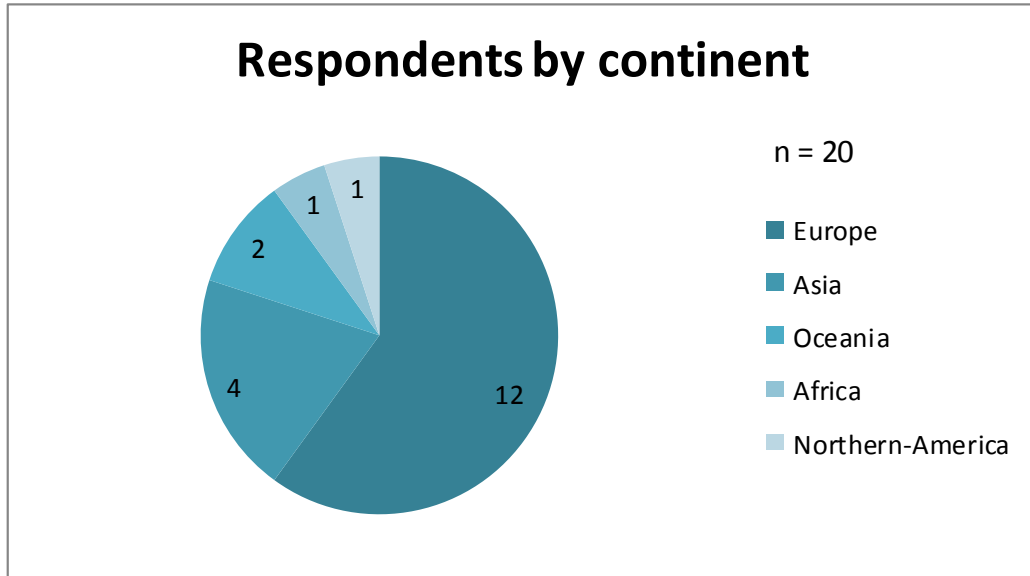


Figure 4. Respondents by continent

The survey received 20 responses from various continents. The majority of the respondents (60%) are working in the European SU's. The second most active continent to reply to the survey was Asia. Asia's SU's were responsible of 20 % of the responses. Oceania, Africa and Northern-American SU order handlers did also participate for the survey. In term of continents, South-America is the only region not represented in this survey.

#### Question 2: Order Delivery Process usage in years

The respondents were asked to inform how long they have been handling the orders within their SU. The purpose of this question was to gain knowledge on the level of experience in years. The amount of experience years does not however automatically correlate the understanding toward the process.

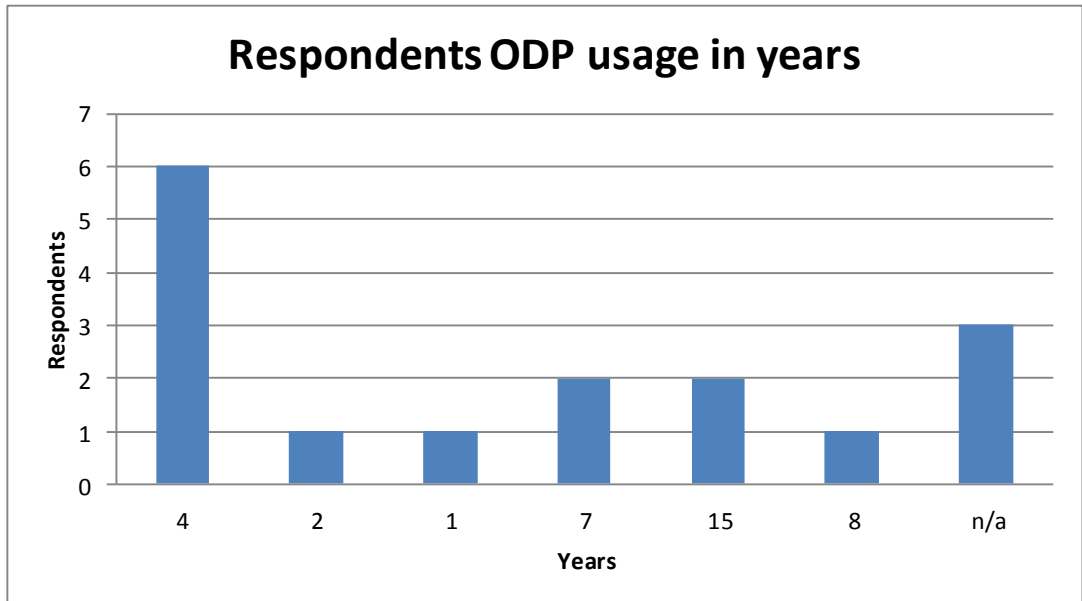


Figure 5. Respondent ODP usage in years

The level of experience with the ODP ranges from 1 year to 15 years. Some of the respondents (3 people) left this question unanswered. From the respondents 30% have 4 year experience in order handling. Two of the respondents (10%) have 15 years of experience in order handling. In average the respondents have 5,9 years of order delivery process experience.

### Question 3: How often is the ODP used

The aim of this question was to see how many of the local SU's order handlers utilize the ODP instructions. How often the instructions are used on particular time frames will provide information on how needed the SU order handlers find the ODP instructions.

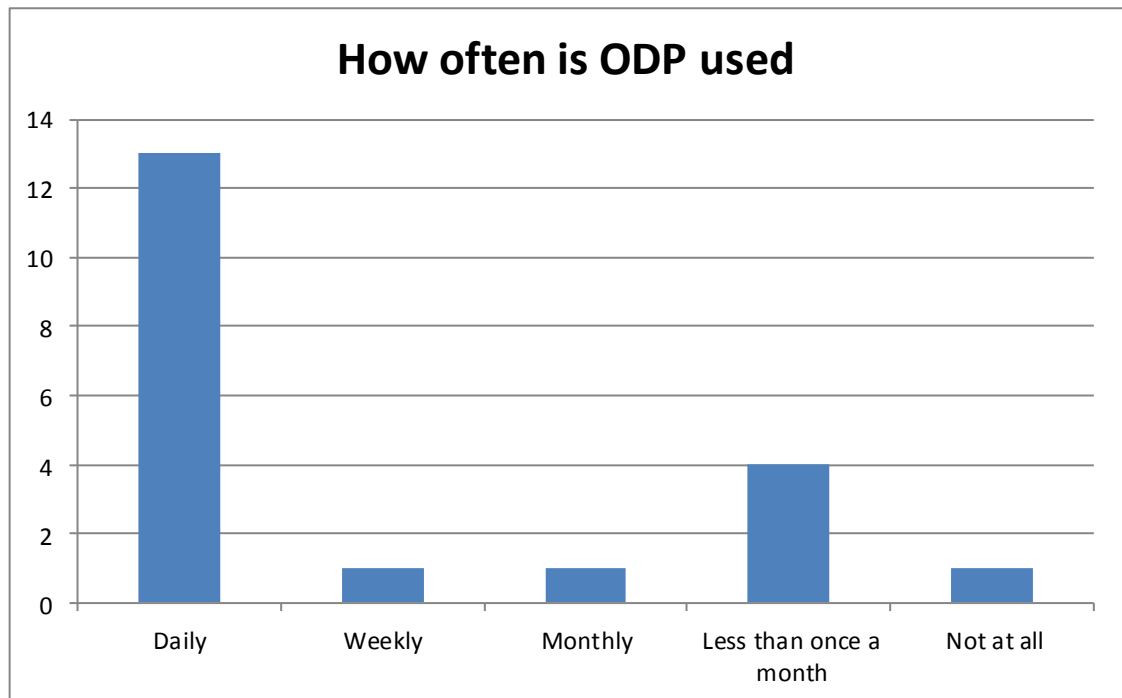


Figure 6. Frequency of ODP usage

From the respondents, 65% state to use the ODP instructions in their daily work. One respondent (5%) uses the instructions weekly and one respondent (5%) monthly. From the respondents 20% use the instructions 'Less than once a month'. One respondent (5%) replied not using the instructions at all.

#### Question 4: The level of clarity and instructiveness

Since the instructions include highly detailed information with many abbreviations this questions was set to see whether the level of clarity is at desired level. The order includes instructions from both Make-to-Stock as well as Make-to-Order processes. The level of logic in how the different aspects and parts have been aligned has been recognized to be somewhat confusing and unclear.

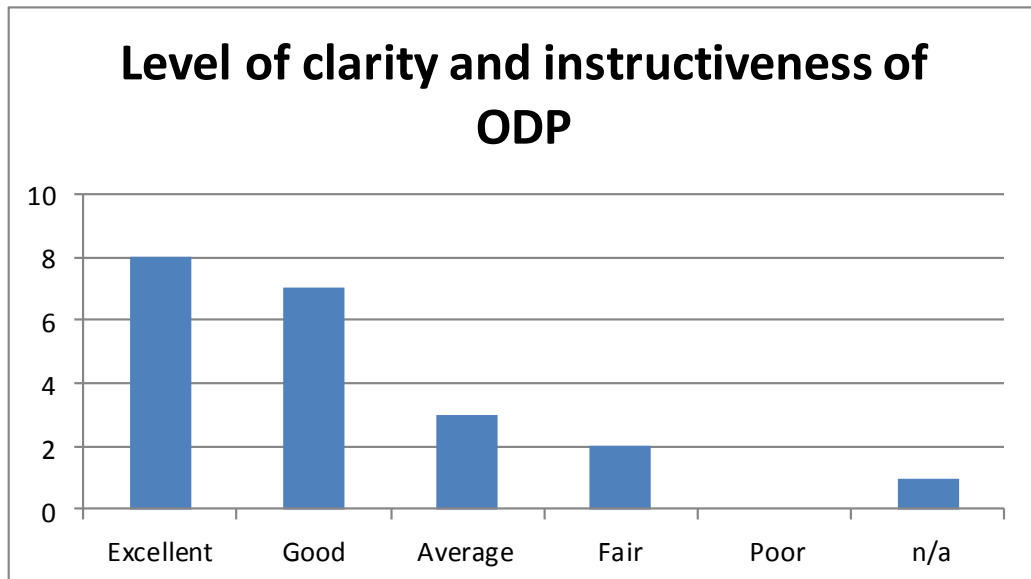


Figure 7. Level of clarity and instructiveness of ODP

Majority of the respondents (75%) consider the instructions to be either 'Excellent' or 'Good' in clarity and instructiveness. The grade 'Average' reflects the feelings of 15% of the respondents. Two respondents find the instruction clarity and instructiveness to be 'Fair'. None replied 'Poor', however one respondent left this question unanswered.

#### Question 5: Instructions facilitate job performance

Despite having clear and instructive instructions, it is also vital that the instructions create a better level of job performance. The instructions have originally been created to improve the effectiveness and to minimize errors. This question was set to see how well the purpose has been reached.

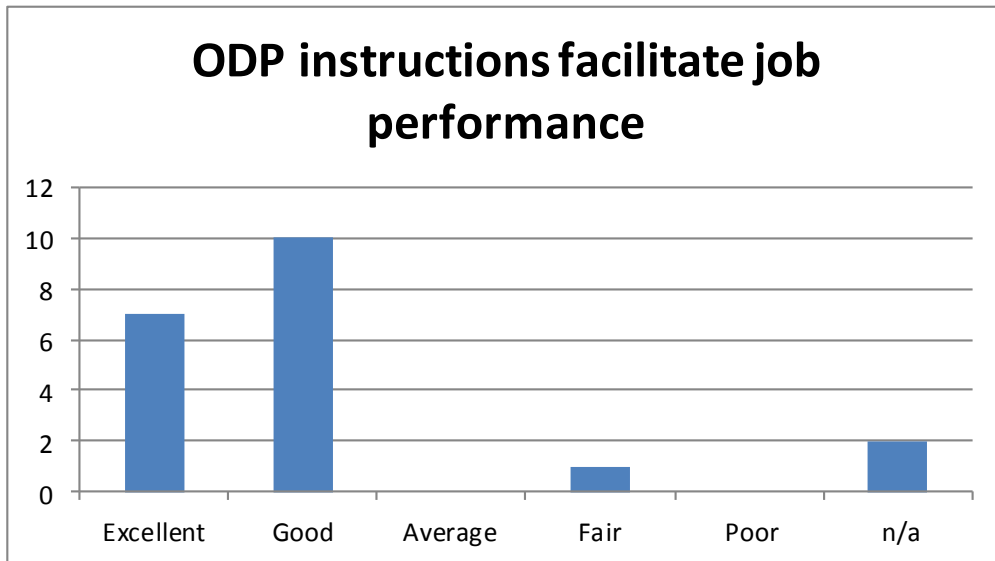


Figure 8. Job performance facilitation of ODP

This question measures how well the respondents find the instructions support their job performance. 50 percent of the respondents find support towards job performance to be 'Good'. 'Excellent' was the response of 35% respondents. None of the respondent found the support to be either 'Average' or 'Poor'. One respondent found the support to be 'Fair'. For this question 2 respondents did not provide an answer.

Question 6: The instructions are up to date

Since the operations at the PU are constantly changing and regulations updated the instructions should have the latest possible information.



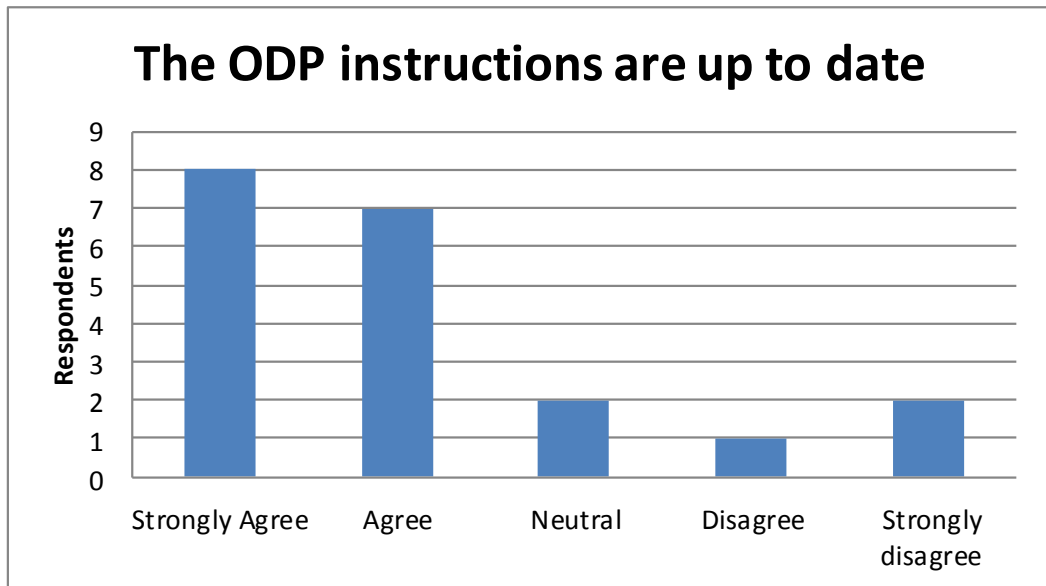


Figure 9. ODP instructions update level

From the respondents 40 % strongly agreed the instructions are up to date. 35% agree the instructions are up to date. In total, 15 % of the respondents disagreed or strongly disagreed with level on update. 2 respondents felt neutral toward the update level.

Question 7: The terminology is clear

There are multiple abbreviations which are needed to minimize the length of the instructions.

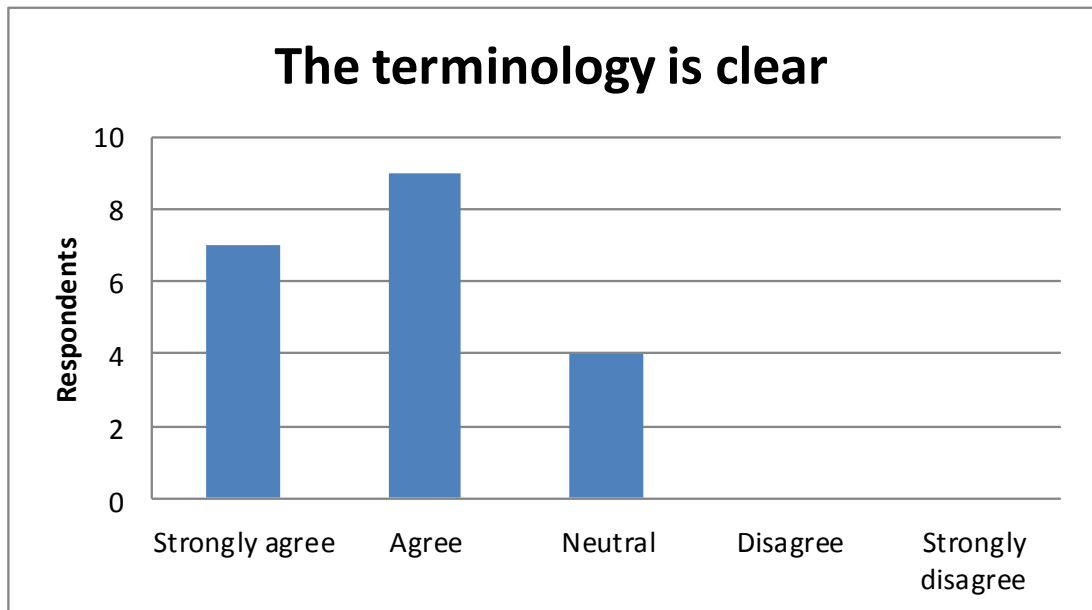


Figure 10. Terminology

The terminology in the instructions was considered to be clear for all of the respondents. For the respondents who strongly agree or agree consist 80% of the respondents. Neutral response was provided by 20% of the respondents.

#### Question 8: Over-all grade of ODP instructions

This question was to measure how the respondents in general find the ODP instructions.

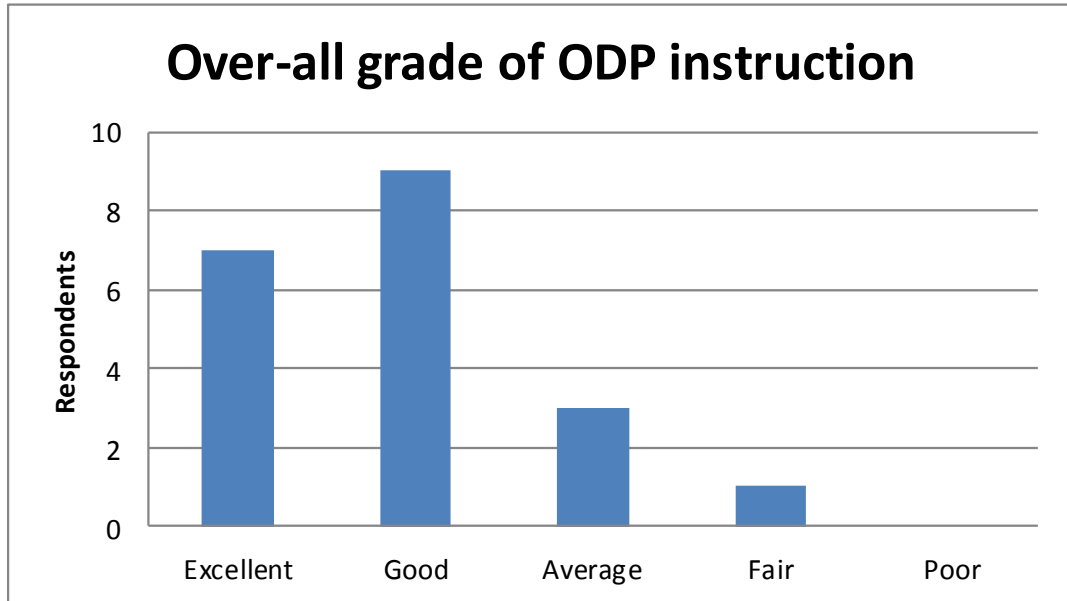


Figure 11 Over-all grade of ODP

Excellent is the over-all grade of 35% of the respondents. 45% consider the over-all grade to be 'Good'. The grade 'Average' was given by 3 (15%) respondents. One respondent found the over-all grade to be 'Fair'.

#### Question 9: Something relevant missing from the instructions

For this part the respondents were able to answer within their own words as to if the instructions were missing something that they wish to utilize.

I would like to have a similar ODP also for other Company X factories

Add revision process instructions

The "present stock levels"/ likely dispatch date if ordered now from factory or central stock (at the time of ordering) if visible may better our performance with improved predictability about delivery to customers or help us choose Air/Sea mode during ordering itself

There should be a slide for factory Orderhandling Team /Shipping Team /Sales and should be shown in an "organisation chart"-type form

Add terms of delivery that you can use

It is sometimes unclear what the differences are between ordering on the different warehouses

No all is there and believe that its very thorough

Freight calculator is missing

Some of the comments have already been included in the instructions which some of the respondents have not noticed. The misunderstanding will be informed to the SU order handlers in person to assist on finding and utilizing the information correctly.

#### Question 10: Improvement ideas

This question enabled the respondents to provide ideas how they would personally improve the instructions.

I am very busy day in day out. A document like this is more a reference tool that I use when I have questions about if a certain part can be rushed or not or if I can place it via ERP or XXX orders however it is a large document that I feel needs to be carefully studied so that I can know the ins and outs of your business. And frankly I never gave it the proper time. So to me it's much more helpful to ask the PU Sales Administrators because I feel as though you should be the expert and that I should get the help I need without having to read through lengthy documents. So yes I use it but VERY rarely. Maybe if I took the time to read it carefully I would find some tricks of the trade in ERP because seriously that program is quite extensive and in 9 years I have only scratched the surface. Believe it or not it is only this year that I learnt that I am super-user for ERP and have been for many years without my knowledge. I wish I could come to the factory one day and get a real feel as to how things work however that is but a dream!

online progress of the order vide ERP, for example if an order has 5 line items namely 10,20,30,40,50, and is confirmed delivery 20/02/2015, if we could have an option to see on 18/02/2015 about readiness of order line wise, and if urgency for us choice to decide on partial shipment ( in above example for instance if line 10,40,50 are ready and they are the ones required for urgency I can request for invoicing of those lines on 18/02/2015 itself)

Unify process with other factories

Would be better that we can change ALL fields before closing the order, e.g. if mistyped in wished delivery date or in delivery address or in PU internal text field, then this cannot be changed when we SAVED the lines. But we would prefer to have all fields open until we CLOSE the order

Many of the ideas related more to actual process than the ODP instructions. This suggests that when provided a channel to provide opinions and ideas all ideas relating to the particular division are expressed. The feedback will not however be bypassed. The feedback will be noted and distributed for further innovations or surveys within the business unit.

## 8.2 Survey question comparison

The purpose of this section is to compare the survey question results in order to display how the location, experience and experienced utility affect each other.

### ODP usage and over-all grade

The linkage between the ODP usage and over-all grade was cross tabulated to display the comparison or the ration between the two different aspects.

Table 1 How often is ODP used	Over-all grade for ODP				Grand Total
	excellent	good	average	fair	
daily	3	7	2	1	13
weekly			1		1
monthly	1				1
less than once a month	2	2			4
not at all	1				1
<b>Grand Total</b>	<b>7</b>	<b>9</b>	<b>3</b>	<b>1</b>	<b>20</b>

Table 1. Cross tabulation frequency of ODP usage and over-all grade

Based on the comparison, the respondents using the ODP daily have the most fluctuation within the over-all grade. The majority of the respondents (13 respondents) are using the ODP daily. From them total 10 respondents find the ODP grade to be either 'excellent' or 'good'. Two respondents find the over-all grade to be 'average' and one respondent finds the over-all grade to be 'fair'. The respondents using the ODP instruction more rarely or not at all gave the ODP instructions either grade 'excellent' or 'good'. In the case of one respondent not using the instruction at all gave an excellent grade.

To alter the responses into numerical form an average grade for the instructions can be displayed. In the survey the numeric grades were notified as following;

(5=excellent, 4=good, 3=neutral, 2=fair, 1=poor)

Based on the numerical responses to the over-all grade for ODP instructions, the average grade for ODP instructions is 4,1.

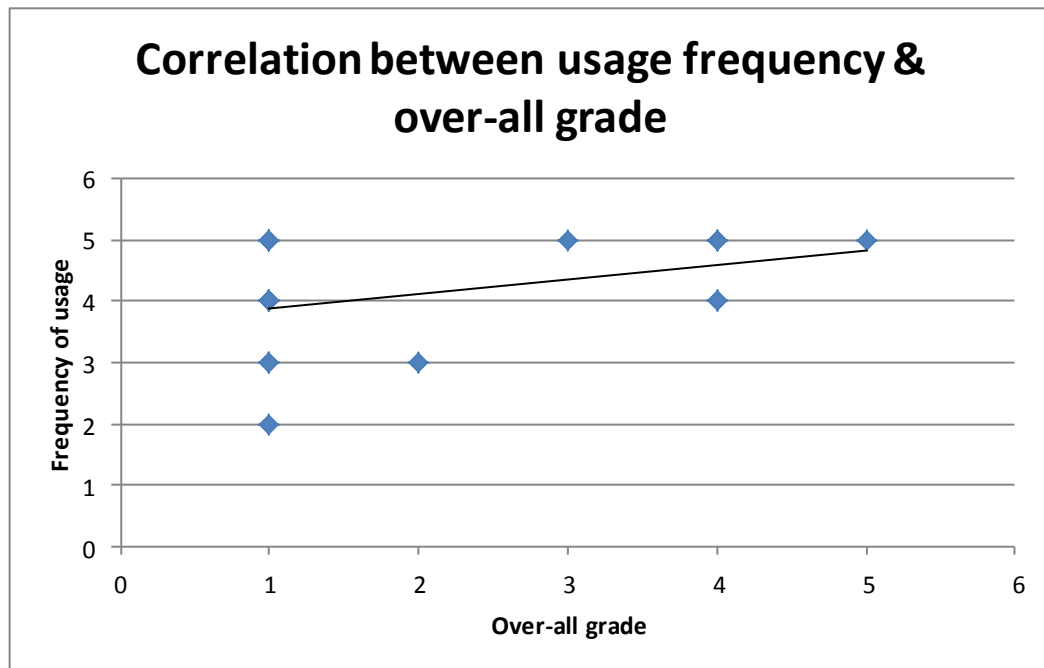


Figure 12. Correlation between frequency of usage and over-all grade

The correlation is calculated based on the known values. The correlation coefficient ranges between -1 and +1. The perfect positive correlation +1 suggests that as one value moves either up or down, the other value will move into the same direction. Perfectly negative correlation -1, means that when one value moves either up or down the order will move into the opposite direction. If the correlation is 0, the values have no correlation and are completely random.

The correlation between usage frequency and over-all grade is 0,3925. The correlation is positive, yet not very strong.

#### ODP usage in years and level of clarity and instructiveness

This comparison was to display whether the ODP experience correlates with the instructiveness and clarity.

Table 2		Level of clarity and instructiveness					
ODP usage in years	excellent	good	average	fair	n/a	Grand Total	
1	1					1	
2	1					1	
4	2	2	1	1		6	
5	1	1			1	3	
7		2	1			3	
8			1			1	
15		2				2	
(blank)	2	1				3	
<b>Grand Total</b>	<b>7</b>	<b>8</b>	<b>3</b>	<b>1</b>	<b>1</b>	<b>20</b>	

Table 2. ODP usage in years & clarity and instructiveness

The respondents with the shortest experience from the survey population find the instructions to be clear and instructive. Same level of clarity and instructiveness can be seen within the respondents who, from the survey population, have the longest experience with ODP. The respondents having ODP experience between 4 to 8 years display the greatest fluctuation towards the clarity and instructiveness of the ODP. In addition two of the respondents with an unknown ODP usage in years find the ODP to be clear and instructive.

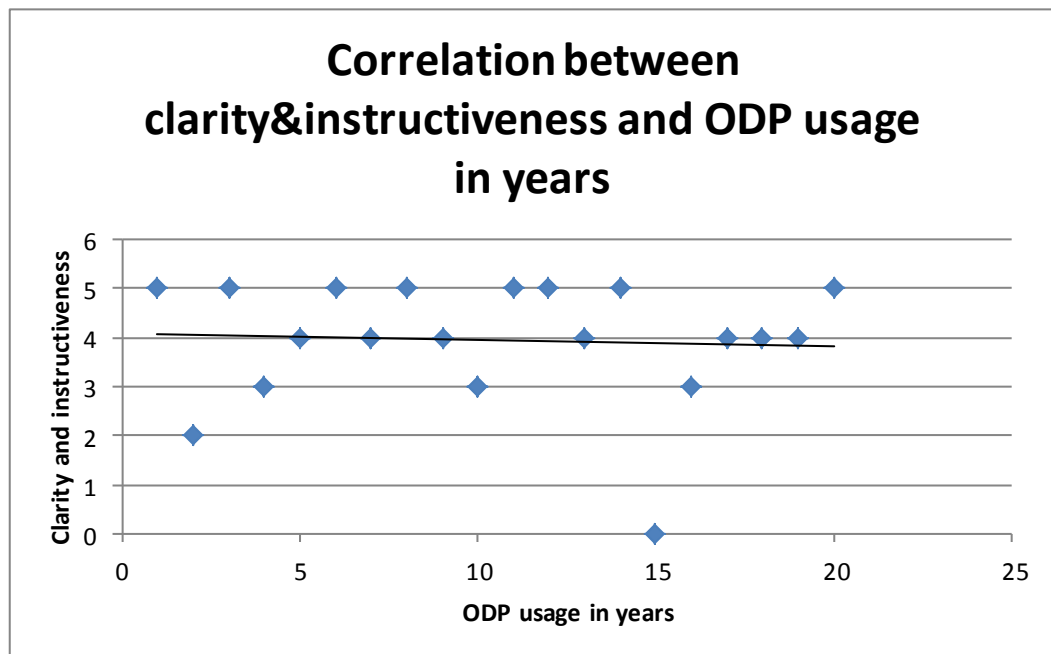


Figure 13. Correlation between clarity & instructiveness and ODP usage in years

The correlation between the clarity & instructiveness and ODP usage in years is -0,217. The negative correlation is not very strong.

### How often ODP is used and how ODP facilitates job performance

Comparing the usage and how well the ODP facilitates job performance is to evaluate whether there is correlation between frequency of use and the benefit.

Table 3 how often is ODP used	ODP facilitates job performance				Grand Total
	strongly agree	agree	neutral	n/a	
daily	5	6	1	1	13
weekly				1	1
monthly		1			1
less than once a month	2	2			4
not at all		1			1
<b>Grand Total</b>	<b>7</b>	<b>10</b>	<b>1</b>	<b>2</b>	<b>20</b>

Table 3. Frequency of use and job performance facilitation

The majority of the respondents using the ODP instructions most frequently find the ODP instructions to facilitate the performance well. 11 respondents using the ODP daily either 'strongly agree' or 'agree' the ODP facilitating their job performance. One respondent felt 'neutral' and two respondents did not provide an answer. The comparison does not display any great differences between the ODP usage frequency and job facilitation.

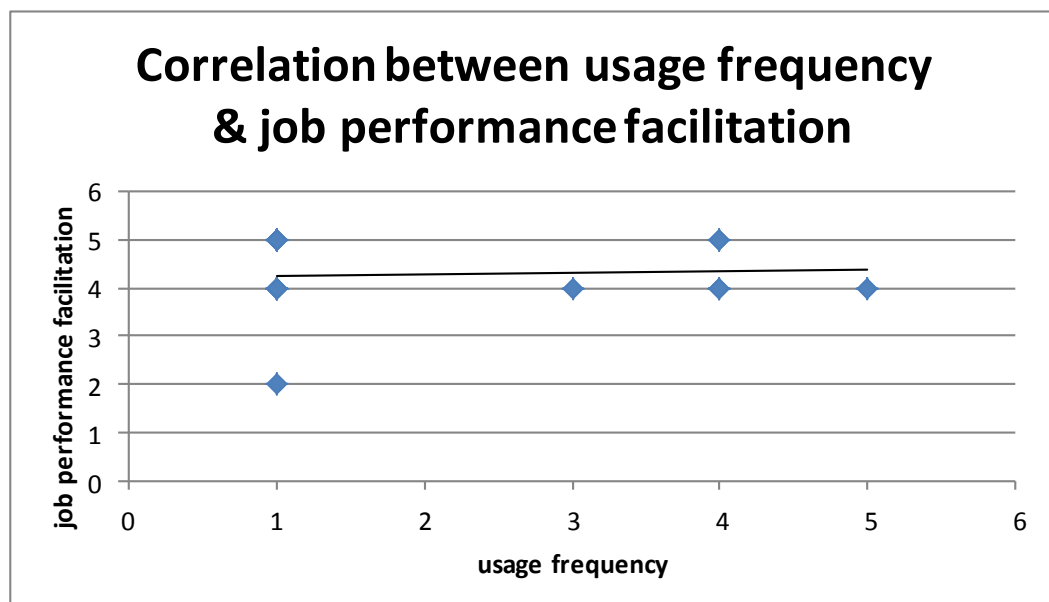


Figure 14 Correlation between frequency of usage and job performance facilitation



The correlation between the usage frequency and job performance is 0,0523. The correlation is very close to 0. This implicates the correlation is nearly random. The improvement of usage frequency will not affect the job performance.

#### Respondents continent and over-all grade

This comparison was performed to display if the satisfaction with the ODP varies between regions.

<b>Table 4</b>					
<b>over-all grade for ODP</b>					
<b>Continent</b>	<b>excellent</b>	<b>good</b>	<b>average</b>	<b>fair</b>	<b>Grand Total</b>
Africa	1				1
Asia	2	2			4
Europe	4	5	2	1	12
Northern-America		1			1
Oceania		1	1		2
<b>Grand Total</b>	<b>7</b>	<b>9</b>	<b>3</b>	<b>1</b>	<b>20</b>

Table 4. Continent and over-all grade

When comparing the over-all grade of ODP and the respondents continent African and Asian respondents appear to give the ODP either grade 'excellent' or 'good'. The greatest variety is between the European respondents. The grade varies between 'excellent' and 'fair'. From the respondents the majority are located in Europe which could explain the greatest variety of over-all grade when compared to other continents.

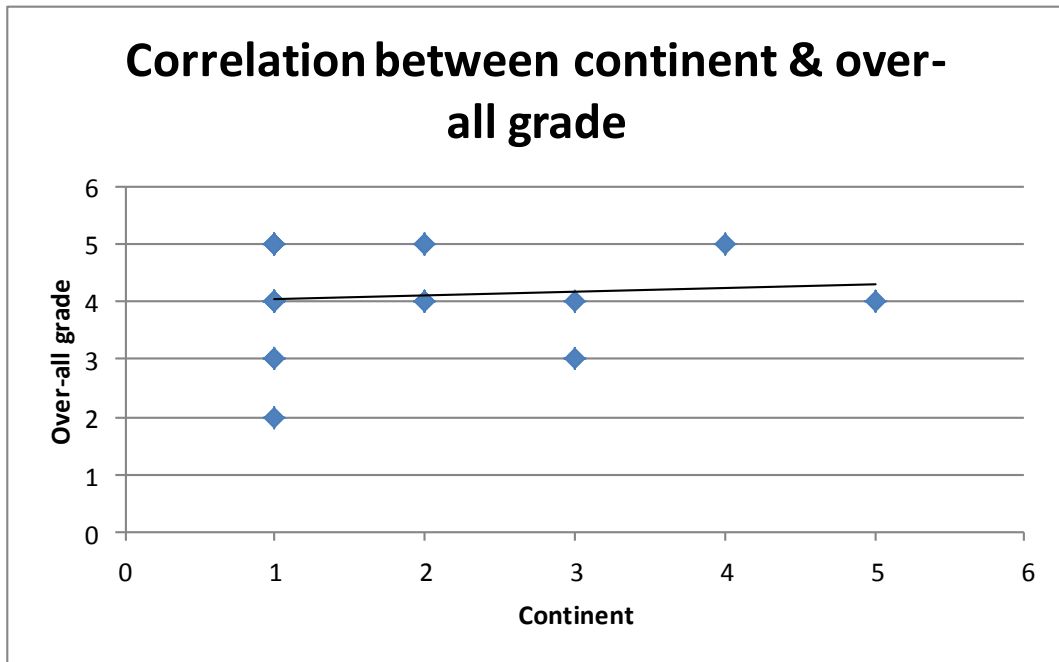


Figure 15 Correlation between continent & over-all grade

The correlation between continent and over-all grade is 0,0795. The correlation is positive, but not very strong. The value is very close to 0, which means the variables compared affect each other almost randomly. Even though more Africans or Northern-Americans would have replied, the over-all ODP grades would not be affected.

Continent and clarity of terminology

This comparison was done to analyse if the continental location affects the understanding of the terminology. Some of the respondents have English as native language, some respondents use English as work language. The survey did not enquire for the respondents native language.

Table 5 terminology is clear <input type="text"/>				
Continent	<input type="text"/> strongly agree	agree	neutral	Grand Total
Africa	1			1
Asia	2	2		4
Europe	4	4	4	12
Northern-America		1		1
Oceania		2		2
<b>Grand Total</b>	<b>7</b>	<b>9</b>	<b>4</b>	<b>20</b>

Table 5. Cross tabulation between continent and terminology

The majority of the respondents either 'strongly agree' or 'agree' the terminology being clear. African, Asian and European respondents are 'strongly agreeing' with the statement. Only European respondents (4 respondents) feel 'neutral' towards the statement.

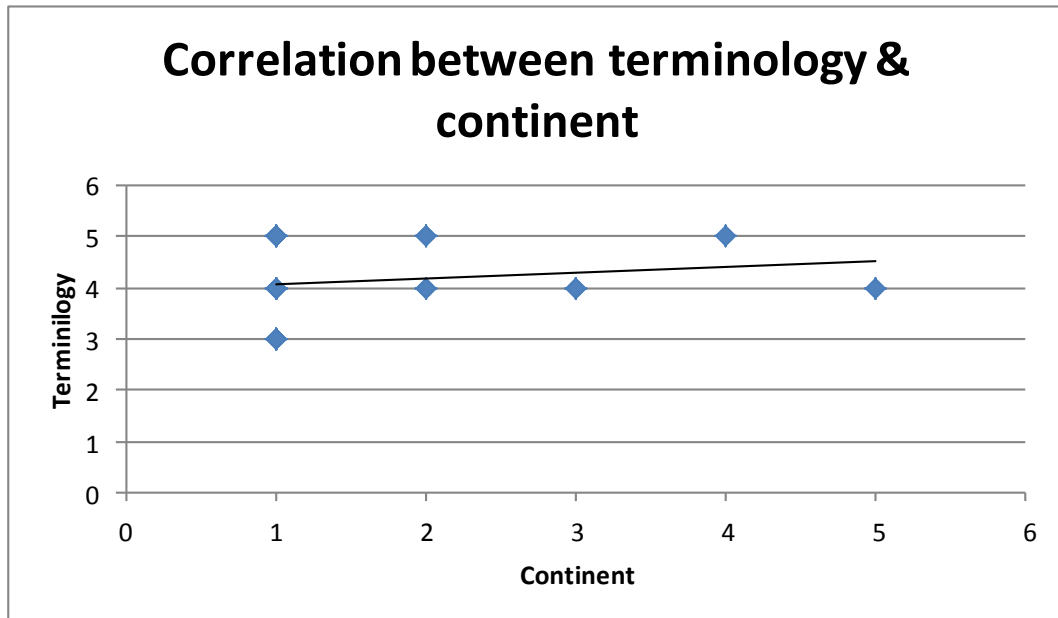


Figure 16 Correlation between terminology & continent

The correlation between the continent and terminology is 0,1668. The correlation is positive, yet not very strong. This means that there is a small linkage between the continent and understanding the terminology.

#### Instructions up to date and over-all grade

This comparison was done to see if the instruction update and over-all grade are linked.

Table 6		over-all grade for ODP <input type="button" value="v"/>			
instructions are up to date <input type="button" value="v"/>	excellent	good	average	fair	Grand Total
excellent	7	1			8
good		7			7
average		1	1		2
fair			1		1
poor			1	1	2
<b>Grand Total</b>	<b>7</b>	<b>9</b>	<b>3</b>	<b>1</b>	<b>20</b>

Table 6. Level of instruction update and over-all grade

Seven of the respondent found the instructions to be 'excellently' up to date and have provided 'excellent' as the over-all grade. The same amount of respondents replied the update level and over-all grade to be 'good'. In total two respondents found the update level to be 'average'. Two respondents felt the update level is 'poor'. The same two respondents also find the over-all grade to be either 'average' or 'poor'.

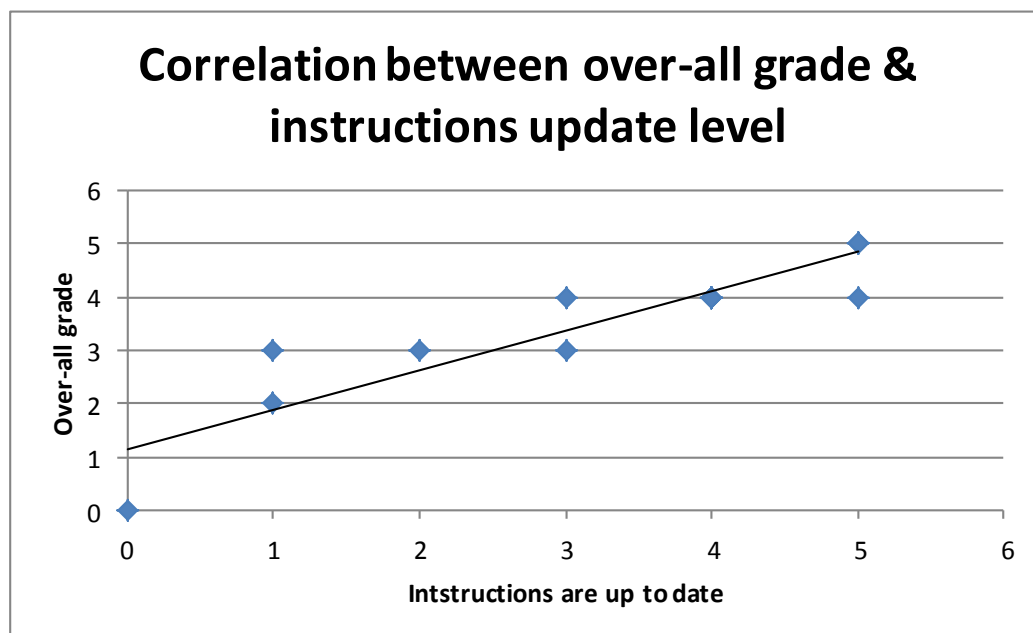


Figure 17 Correlation between over-all grade & instruction update level

The over-all grade and instructions update level have a positive correlation 0,92.

The correlation is very strong. This means that if the instructions would be better updated the over-all grade would improve.

### 8.3 Interview result

The interview was performed by the PU Sales Administrators. The questions are also visible in Appendix 2.

Question 1. How do you feel the Order Delivery Process helps in your work?

I use ODP nearly daily when there is a need to instruct and remind the local Sales Units in these matters. As production unit order handlers we are aware on how the process works, and we don't really use instructions as our personal guide line.

ODP is helpful when explaining to the SU's, a good tool for the production unit order handler and guideline for the SU order handlers.

Since there are many details within the process the ODP acts as a good tool when training internally as well as when assisting or explaining some matters to the SU.

Question 2. How do you feel the current instructions are working?

The current instruction could be reinforced and specified. In the current instructions the topics are divided under various subjects.

There should be more clear distinction between factory and warehouse processes.

The instructions are working but need updating and clarification on some topics. Since there is a multicultural user-base the interpretations can also appear very different.

Question 3. How do you feel the instructions support the Sales Units order handlers?

The ODP instructions are a terrific guideline for the SU order handlers, assuming they read it.

Only if the SU order handlers read the ODP we have provided for them. It is possible that nearly 50 pages long instructions will not be read by many. Recently there was a case the SU order handler was not aware that some products are ordered and delivered from the central stock, not from the factory.

The order handlers use various different IT-software during their day, if the ODP would be in the form of a booklet, it might enable more order handlers to check the ODP prior to contacting the production unit Customer Service Specialist. Sales Administrators are of course there to assist and help, but due to the many contact people, the ODP could act as a fast assistance. Since there is also a time

difference between some of the sales units and the production unit, the ODP also enables the order handler to save time when it comes to order creation.

Question 4. Do you have something else you would like to add concerning the ODP?

We have so many details within the ODP, there should be cross-check performed to make sure all is included

There are new order process pilot programs which should be added to the instructions. Even though not all SU's are aware of the piloting programs, the pilot programs should be added since all SU's will move under the new processes gradually. If the info is not added to the instructions now, a new version of ODP would be needed rather soon.

#### 8.4 Examination of the interview answers

The interviews were conducted via email and the interviewers were chosen based on the customer interface job description. All the interviewers are performing as Customer Service Specialists. Between the respondents, the experience in the particular job description varies between 5 months to 16 years.

#### 8.5 Final analysis of the findings

The findings were used to answer the research question in order to create as effective and comprehensive instructions possible. Based on the survey, many SU order handlers were satisfied with the instructions. For an over-all grade the ODP instruction received 4,1. This can be considered as a good grade. However the aim is to receive even higher level of satisfaction toward the instructions. The PU Sales Administrator interviews also suggest the need for updates, corrections and new look of the ODP instructions.

The survey also provided feelings, thoughts and info on other aspects which were not asked in the survey. Some of the SU order handlers used the opportunity to express some other aspects which they find to be working well, need change or is missing. The issues which are not linked directly into ODP were not taken into account when creating the instructions. The issues will be distributed to the responsible Sales Administrator to be utilized in a more suitable forum.

## 9 Message design

### 9.1 Company standards

Morrison et al. mentions that one aspect of the analysis is defining the characteristics of the target audience, or those individuals who are not performing as expected. The knowledge gained can provide information on how the instructions should be adjusted. The challenge is to identify the differences in learning based on cultural backgrounds. The individuals not performing as expected are most often order handler who doesn't either understand the instructions the way it was meant to or are confused by the amount of details required for a perfect order. How to design the message is important to the instructional strategy after which the focus can be turned to designing the message (2011: 176). Morrison et al. explains the process using techniques ranging from the way the sentences are structured by using signal words such as 'Recall in the last step..' to the use of typographical graphics, text, and typographical design can further enhance the readability and the learner's understanding of the instructions (2011: 16).

Some of the ODP details are targeted only for particular SU's. The unnecessary details for the other SU's are seen as potentially creating confusion. There are also piloting system and projects operating simultaneously with the ODP update creation. The pilots and other projects are a part of the ODP instructions and the phase of each project process must be forecasted to the instructions. This is to avoid the instructions becoming outdated the moment the booklet printing is finished.

When creating the instructions Company X style manual should be used in order to create a document which follows the Company X standards.

#### 9.1.1 Cultural variables in the communication process

'The logical progression of reasoning varies widely around the world and greatly affects the communications process' (Deresky, 2011: 142). Different cultures reason in various ways, hence the instructions should be as clear and straight forward as possible. The language can also cause miscommunication, due to a person's inability to speak the local language states Deresky. Since the official corporate language at Company X is English, miscommunication among the non-native English-speakers is possible.

Deresky also states that even between the same language (i.e. British vs American) the two countries are separated by a common language.

The ODP instructions were created using as simple and with as little room for interpretation as possible. All the abbreviations are explained in the start of the booklet and all terminology is explained in detail during the ODP.



## 10 Ordering process mapping

The ordering process mapping will be included into the instructions in order to also provide visual imagery to support the written instructions.

According to Cobb (2005: 23) a process map provides a diagram that shows how the various components of the process are interconnected, in a graphical format that is easy to understand.

Cobb states the numerous advantages of a graphical view of a process over a purely textual description. The overall process and the interrelationship between activities in the process can be much more easily visualized and understood. Processes can also be displayed at various levels to fit with different levels of interest. This way the interrelationship can be more easily understood.

Detailed maps are also valuable as documentation of the process. Maps can be used as future training tool or reference to procedures (Jacka & Keller, 2009: 316)

## 11 Conclusion

The purpose of this thesis was to examine and improve the ODP instructions provided for the SU order handlers at the case company. The author focused on personal mastery at work, gathering feedback within the Sales Administrator team and by gathering survey feedback from local SU order handlers. The objective was to find out which sections of the ODP instructions require updating the most, which sections require clarifications, what is completely missing and whether something is no longer relevant.

The objective was approached through a quantitative study executed with a survey questionnaire. The survey was followed by a qualitative study which was performed as an interview for the Sales Administrators working in the customer interface. Both the survey and interview focused on both understanding and personal opinions toward the ODP instructions.

Overall, the local SU order handlers seem to be rather satisfied with the current ODP instructions. The results of the survey and the in-depth knowledge collected from the PU Sales Administrators do however indicate that updated ODP instructions are necessary.

The cultural background and experience within the ODP instructions does not seem to have a strong correlation. Despite the cultural differences did not appear in the survey results the aspect was considered when creating the ODP instructions. Additional information concerning the updated ODP will be available once the current and possibly new SU order handlers have had the chance to use the updated ODP for a while. For the PU Sales Administrators the ODP development will become visible in the form of decreased e-mail enquiries, improved OTD's and faster order confirmations. These, and many more KPI's are constantly measured and the ODP updates are expected to affect the particular KPI's positively. An additional study should be made to ensure how the SU's find the update. The same survey could be sent to the same survey population to test if the change is seen to be towards better in the SU's point of view.

The relevant theories show the importance of instructions, especially within a larger organization. The benefit ratio is complex to measure, yet the benefits the various different functions within the organization receive are well recognized. Among the organizational benefits, the value addition to the customer can be considered to be the most important.

Due to the time limitations the size of the sample was restricted, yet the results did not suggest a greater survey population was necessary. Based on the survey results and the qualitative interview the total sample size remained relatively small. In this thesis the sample size did not however appear to require larger quantities of respondents. The possible value gained from a larger sample size would have been fairly small and most likely would not have created any extra value. Both the survey respondents and the Sales Administrators responding to the interview had the possibility to answer the questions independently which does minimize the interviewer from directing the answers to a particular direction.

Since all the respondents are familiar with the author, it would be interesting to see whether the survey responses would be different if the survey would be done more anonymously. This was not seen as an issue when conducting the survey since it was explained to the survey respondents that the aim is to improve the instructions and through the survey localize any issues. In general there exists an open two way communication and feedback culture within the SU order handlers and the PU Sales Administrators.

The goal of this project was to provide more value to the customer through Company X's internal instructions. The study suggests that companies can no longer manage by managing the value addition within organizations own operations and functions. An open two-way communication with the customers is needed in order to provide customers the value they require today. Customer interface holds an important role in this.

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## Survey Questionnaire

- 1) What is your country of location?
- 2) LAC Order Delivery Process usage in years?
- 3) How often is the ODP used?  
(5=daily, 4=weekly, 3=monthly, 2=less than once a month, 1=not at all)
- 4) The level of clarity and instructiveness of ODP (1-5)  
(5=excellent, 4=good, 3=neutral, 2=fair, 1=poor)
- 5) ODP instructions facilitate job performance (1-5)
- 6) (5=excellent, 4=good, 3=neutral, 2=fair, 1=poor)
- 7) The instructions are up to date (1-5)  
(1=strongly disagree, 2=disagree, 3=neutral, 4=agree, 5=strongly agree)
- 8) The terminology is clear (1-5)  
(1=strongly disagree, 2=disagree, 3=neutral, 4=agree, 5=strongly agree)
- 9) Over-all grade for ODP instructions (1-5)
- 10) (5=excellent, 4=good, 3=neutral, 2=fair, 1=poor)
  
- 11) Something relevant missing from the instructions?
- 12) Improvement ideas?

## **Interview questions**

- 1) How do you feel the Order Delivery Process helps in your work?
- 2) How do you feel the current instructions are working?
- 3) How do you feel the instructions support the sales units order handlers?
- 4) Do you have something else you would like to add?



## **Informal interview questions**

Dear Customer,

We are updating our “Order Delivery Process 201X” instruction package and would appreciate your input to improve it.

What are the most important things for you to have in the instruction package? Is there anything in the current package that should be clearer? Is there anything you would add to the current package?

The main aim of the package is to ensure quicker delivery for you by helping you to accurately input your orders. Your suggestions will be greatly appreciated.

We are looking forward to receiving your suggestions within two weeks. Kindly please keep Ms XXX as “cc” copy when replying to this message.

Thank you.

Best regards

XXX XXX

Customer Service, Operations