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How to Handle Intermediary Customer Requests

Process Development for a Small Consultancy Company

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It has been an interesting and inspiring journey to complete the Master's Degree programme. It all started by a brotherly competition, where one must show, what one can accomplish, when really trying to improve oneself. At the end, there is that sense of accomplishment and a small hint of sadness as all good journeys must come to an end.

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My dear parents, for all the love and support, always.

My dear brother Hannu, for setting the bar high.

My dear wife Taru and our boys, for being there when I needed you most.

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| <p>The objective of this Thesis was to develop an appropriate process to handle intermediary customer requests for a small consultancy company. The purpose was to address the current inefficient ways of working, lack of process description and lack of role and responsibility descriptions.</p> <p>This Thesis was based on qualitative research methodology, design research in the form of current state analysis with literature research from relevant areas to create a conceptual frame work. The data collection was done in three separate rounds, based on stakeholder interviews and workshops to produce a proposal of a process to handle intermediary customer requests.</p> <p>The proposed process for handling intermediary customer requests consists of process flow description, a RACI matrix-based responsibility area matrix to indicate roles and responsibilities during the process execution to clarify, for the relevant participants, what kind of actions need to take place during the process execution.</p> <p>The final proposed process for handling intermediary customer requests is relevant for the case company to improve the current ways of working and offering tools to mature the company culture and to offer clear descriptions for roles and responsibilities.</p> | |
| Keywords | Process Development, Consultancy |

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1 Introduction

The purpose of this Thesis is to focus on developing a new process for handling customer requests in a small new consultancy company. The case company is relatively new and does not have much supportive structures in place, including process to guide the everyday work as all the resources are focused on business cases and working in customer assignments.

This leaves the company development into sidetrack, for obvious reasons, but in order to prepare for future growth, it is important to improve ways of working by creating supportive structures in the form of processes.

The target is to investigate the current ways of working and identify areas for improvements and have a pilot case of proposed new process.

1.1 Business Context

IsoSkills Oy is an IT consultancy company established in 2016 to offer IT consultancy services in project management and quality assurance consultants for external customer assignments. The company does some small internal development work, but the focus of this thesis work is related to the external consultancy business.

The company has two ways of doing business, either having direct contact with the end customer for the services, or through an intermediary company, usually a larger consultancy company, which has the direct contract with a number of different end customers.

1.2 Business Challenge, Objective and Outcome

The challenge for the company is the current inefficient ways of working, when handling the customer requests from intermediary companies, there is no proper process in place to describe roles, responsibilities and schedules.

The object for this Thesis is to develop an appropriate process to handle intermediary customer requests.

The scope is limited to intermediary requests and leaves the direct customer cases out.

The outcome is a process for handling intermediary customer requests.

1.3 Thesis Outline

This Thesis consists of seven sections. Section 1 is the introduction to the thesis, to the case company and the business problem and the outcome of this study.

Section 2 describes the methods and materials used for the study, the used research approach, research design and the data plan.

Section 3 describes the current state analysis of the ways of working in the case company, describing in detail the nature of the intermediary requests, the customer needs, and the current approach to process the requests.

Section 4 describes best practices from relevant literature, how other companies have solved the same problem in their respective fields of business and which of those approaches would offer possible solutions for the case company.

Section 5 describes the proposed process to handle the intermediary customer requests, based on the current state analysis and the literature examples from sections three and four, respectively.

Section 6 describes the limited scope pilot and the feedback from the case company to the proposed approach to handle the intermediary customer requests and the final proposal for the process.

Section 7 summarizes the thesis work and the recommendations for the implementation of the proposed process including evaluation of the completed project.

2 Method and Material

This section describes general research methods and the selected approach in this study by describing in detail the research approach, data collection and analysis methods used in this Thesis

2.1 Research Approach

Research approach is a description of the research methods used for the data collection, which the current state analysis is based upon. The research method used in this Thesis is a multi-method approach. It combines different source materials for qualitative approach. The selected approach is described in more detail in chapters 2.1.1 and 2.1.2.

2.1.1 Design Research (AAR)

In general, research methods can be divided into qualitative or quantitative, each directing the focus of investigation from a certain angle.

Qualitative research focuses on investigating a phenomenon and attempts to describe the findings using information and not statistical analysis. It offers more flexibility for the conductor of the investigation by not been strictly confined to methods used. (Kananen 2013: 31-32)

Qualitative research approaches a phenomenon from a theoretical perspective, the questions used are derived from theory, and the purpose is to produce numbers to formulate a mathematical or statistical explanation to the phenomenon. (Kananen 2013: 34)

For a more practical approach, active research design is more appropriate due to the nature of practical nature of the thesis work, compared to the scientific based theoretical approach. Active research design bridges the gap between the theoretical and practical worlds, while still maintaining the accepted validation of the selected research approach. (Kananen 2013: 12)

Design research aims to combine development and research into a model for providing more scientific approach for researchers, as Figure 1 illustrates.

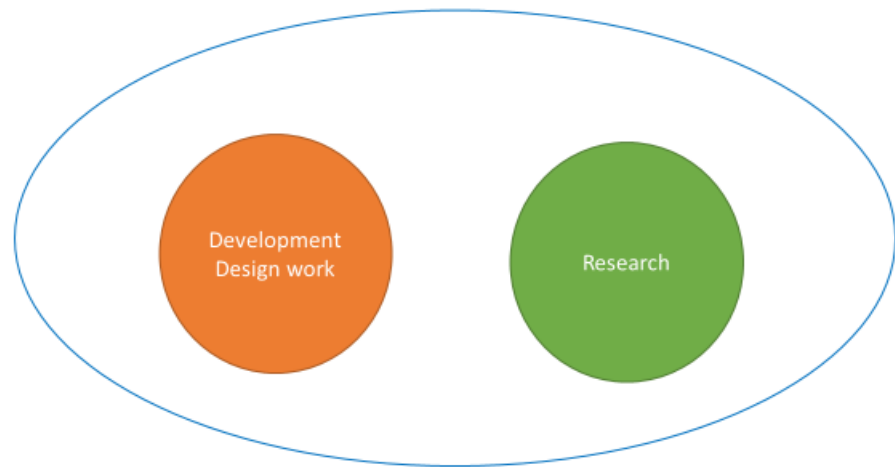


Figure 1 Combination of research and design

The principle for action research can be trace back Lewin's work, who investigating methods and weakness of those methods derived from natural sciences. He was concerned whether those methods can be applied to social sciences. (Blichfeldt 2006:2)

The purpose for action research was develop for the reason to focus on experimental manipulation of research object and to observe real life consequences of on the object of interest. (Blichfeldt 2006:2)

This Thesis applies design research approach in the format of interviews and customer feedback; therefore, the qualitative method is more appropriate option. This thesis does not utilize any statistical analysis or any other quantitative methods in the research. The selected approach is described in more detail in the following chapter 2.1.2.

2.1.2 Multi-Method: Multiple Qualitative Data collections

To solve a problem, there are different research methods available. The purpose of a research is to find a solution to a problem identified in the beginning of a study. The idea of a Thesis is to offer for a reader an understanding of a phenomenon, to illustrate what is this all about. (Kananen 2013:27)

The selection of method between qualitative research and quantitative research can lead into application of blended, the design research, illustrated by Figure 2 below.



Figure 2 Research methodologies.

Figure 2 shows the combination options for different research methods available to Thesis work, and the blend of both options in the middle. The selection of proper research method usually depends on the research problem if there are already existing theories available to explain the phenomenon. (Kananen 2013:27)

The purpose for this thesis is to utilize multi qualitative data collection method, as there are three data collection rounds. The analysis phase is supported by researching relevant literature to formulate a conceptual framework. The data collection for this Thesis is done in two distinct ways; by interviewing several selected colleagues at the case company, described in Table 1 in chapter 2.2, to identify the current ways of working based on a predefined set of questions, described in detail in Table 2 in chapter 2.3.

The purpose is to exclude the author as a source of information for this research, in order to validate the opinions and to focus only on the responses of the interviewees.

Another set of information is based on any feedback from the intermediary companies regarding the actual ways of working, excluding any comments regarding the quality of the candidates supplied to the customer, how well the case company was able to meet the requirements and focusing the ways of working instead.

2.2 Research Design

The selected research design consists of four parts; current state analysis, literature research, process development and small scale pilot. This is described in more detail in Figure 3 below; Research Design.

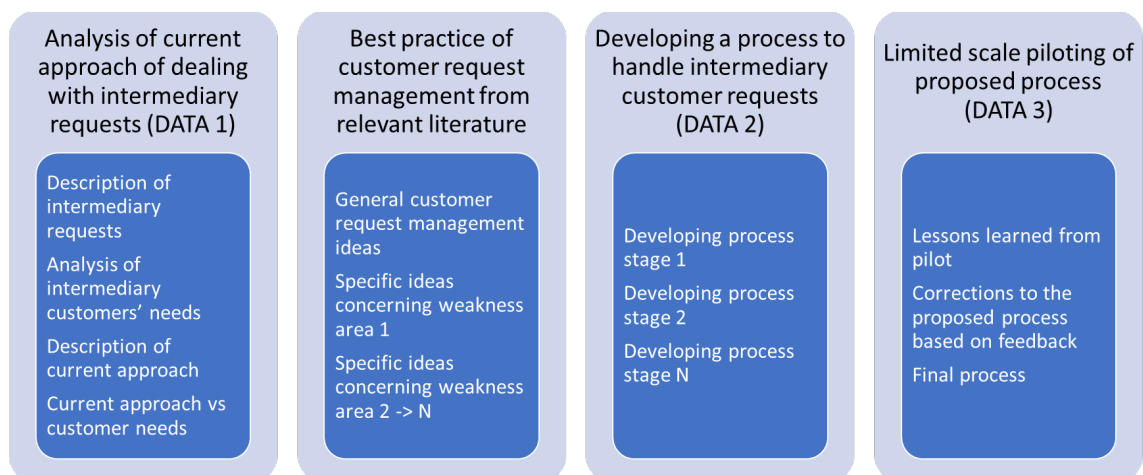


Figure 3 Research Design

Figure 3 illustrates the different data collecting points in the research and the appropriate steps of the research, when the data is applied.

The first part of the plan consists of current state analysis, where the main purpose is to investigate and identify the current ways of working, the main actors and the weakness areas, where the improvements should be targeted.

The second part describes the literature research approach, which has the purpose to identify possible scenarios, which would be able to offer solutions to the found weakness areas from the current state analysis phase.

The third part describes the process development work, based on the previous parts, the current state analysis and the applicable literature based examples. The purpose is to develop a working model for the case company, to cover the weakness areas found in the current state analysis.

The fourth part describes the limited pilot and the feedback from the implementation phase of the developed process model, including lessons learned and the final proposal as the process for handling intermediary customer requests in the case company.

2.3 Data Collection and Analysis

The research plan describes the approach selected for this Thesis and the applicable data collection points in the methods. This section describes in more detail the applied data collection methods. Figure 4 shows the data collection plan.

Data Plan

| | CONTENT | SOURCE | INFORMANT | SCHEDULE | OUTCOME |
|---|--|--|--|-------------------|--|
| DATA 1: Analysis of current approach of dealing with intermediary requests | <ul style="list-style-type: none"> Description of intermediary requests Analysis of intermediary customers' needs Description of current approach Current approach vs customer needs | <ul style="list-style-type: none"> Interviews with stakeholders | <ul style="list-style-type: none"> CEO Managing Director Sales Manager 1 Sales Manager 2 Recruitment Specialist | December, January | <ul style="list-style-type: none"> Strength and weakness areas identified |
| DATA 2: Developing a process to handle intermediary customer requests | <ul style="list-style-type: none"> Developing process stage 1 Developing process stage 2 Developing process stage N | <ul style="list-style-type: none"> Interviews with stakeholders | <ul style="list-style-type: none"> CEO Managing Director | March | <ul style="list-style-type: none"> Initial proposal of process to handle intermediary customer requests |
| DATA 3: Limited piloting & feedback | <ul style="list-style-type: none"> Lessons learned from pilot Corrections to the proposed process based on feedback Final process | <ul style="list-style-type: none"> Workshop | <ul style="list-style-type: none"> CEO Managing Director Sales Manager 1 Sales Manager 2 Recruitment Specialist | April | <ul style="list-style-type: none"> Final process |

Figure 4 Data Plan

As shown in Figure 4, the thesis relies on three different DATA, collected at different stages of the research. Three different DATA can also be called 'triangulated data'. The purpose to have three different data collection rounds would be to ensure the ideas and feedback from the stakeholders would be taken into consideration while creating the proposal for handling intermediary customer requests process.

The more data rounds there are used in this Thesis, the more opportunities the stakeholders have to interact and offer their viewpoints and improve the final proposal. This would also improve later on the actual implementation of the proposed process model, as the stakeholders have participated in the creation process as well. The DATA 1 consists of interviews of the case company, described in detail in Table 1 below.

| The participants | Role | Topic | Date | Duration | Reference Document |
|------------------|-------------------------------|--|------------|------------|--|
| ISO1 | CEO | Current ways of working, by going through pre-defined set of questions | 11.01.2019 | 18 minutes | OBS recording, written transcription in MS Word document |
| ISO2 | Managing Director, Finland | Current ways of working, by going through pre-defined set of questions | 17.01.2019 | 65 minutes | OBS recording, written transcription in MS Word document |
| ISO3 | Sales Manager | Current ways of working, by going through pre-defined set of questions | 22.01.2019 | 27 minutes | OBS recording, written transcription in MS Word document |
| ISO4 | Sales Manager | Current ways of working, by going through pre-defined set of questions | 22.01.2019 | 30 minutes | OBS recording, written transcription in MS Word document |
| ISO5 | Sales and recruitment trainee | Current ways of working, by going through pre-defined set of questions | 21.01.2019 | 43 minutes | OBS recording, written transcription in MS Word document |

Table 1. DATA 1 Collection

Table 1 explains the current state analysis part of this thesis, who are the stakeholders participating and how the data 1 will be collected for analysis. The predefined questions

are used for determining the current ways of working in the current state analysis. The purpose is to describe the roles, responsibilities and the tools currently used in the case company and how does the case company manage currently the intermediary customer requests.

The questions used were purposefully selected to be open type questions, in order to maximize the details and the respondents' opinions and observations to describe the current ways of working. This would present the bulk of the data for the current state analysis. Table 2 describes the questions used for the interviews.

| Number | Title of Questions |
|------------|---|
| Question 1 | How would you describe the current ways of working regarding the intermediary customer requests? |
| Question 2 | How would you describe the current roles involved in the handling of the aforementioned requests? |
| Question 3 | What kinds of tools are used in recording and processing the requests? |
| Question 4 | How is the progress followed up? By Whom? |
| Question 5 | In your opinion, what type of positive aspect there exists in the current ways of working? |
| Question 6 | In your opinion, what types of improvements are needed and why? |
| Question 7 | What kind of customer feedback there has been regarding the ways of working? |

Table 2 Interview questions

The DATA 2 part focused on the process development phase of this Thesis, and the DATA 3 focused on the limited pilot of the proposed process and the final proposal, based on the feedback and the observations from the limited pilot run. The plan is to have a workshop with all stakeholders to walk through all different steps in the proposed process and gather feedback and build the final proposal based on the material from the workshop.

3 Current State Analysis

This section discusses the findings from the interviews described in the previous section. The purpose is to describe in detail the requests, the interactions of the companies involved, how the data was collected; who were interviewed, what the key findings were and what the strengths and weakness of the current ways of working are.

3.1 Overview of the Current State Analysis Stage

The current state analysis was conducted in three steps. The first step was conducted with a series of interviews; the participants were selected from the case company based on the current roles of the people, in order to ensure that all different areas would be represented in the investigation; sales, recruitment and resourcing.

The participants were interviewed individually in five different sessions during January 2019, the interviews lasting from 18 minutes to 65 minutes, and the participants were prepared by providing the used questions in beforehand, to ensure efficient time management. The participants had the opportunity to familiarize themselves with the questions, but all information was collected over Skype calls. No written texts were submitted for the interview process. These Skype calls were recorded by using third party software and saved for the next step.

In the second step, after the interviews were completed, the recordings were transcribed into plain text and added to the Thesis as appendices. This data was used for the analysis in step three.

The third step consisted of analysis of the data collected in step one and, with the outcome of strength and weakness areas and key findings, which are used for the development of the future proposal of a new process.

3.2 Description of the Intermediary Requests

The case company's business is based on consultancy work; the company offers their competences to the customer to be used in various different projects under the customer's management and supervision. Customers are using the services for a limited time, either due to the competences being such a niche area that it is not beneficial to acquire the skillsets for in-house, but rather utilize existing service providers to accommodate the needs.

Figure 5 below illustrates the different relationships in the current business environment, with end customer and intermediary customer.

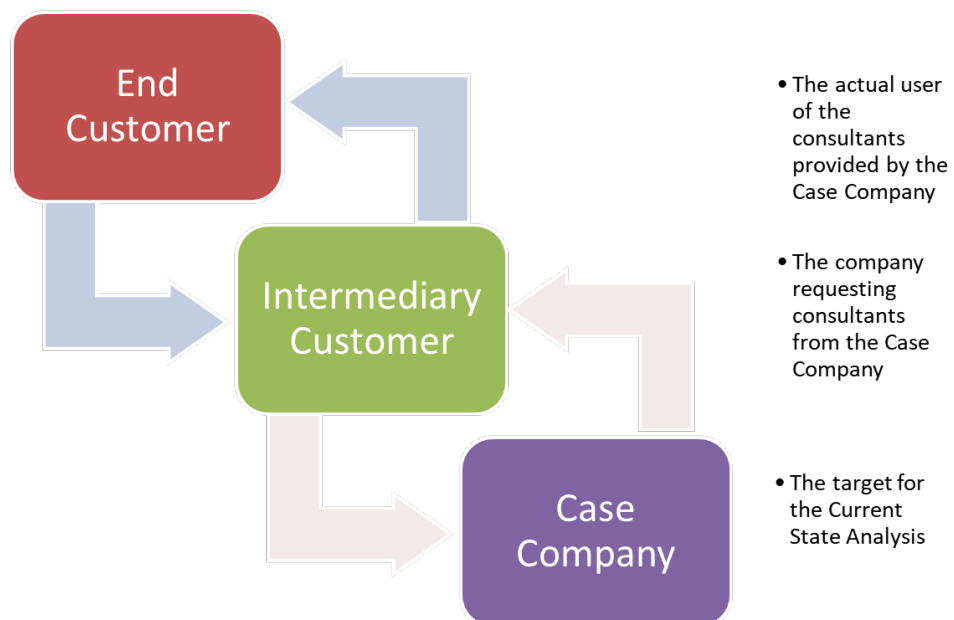


Figure 5 Company relationships

As seen in Figure 5, the intermediary customer in this context is a company requesting competences from the case company to be used in the end customer's projects. The case company does not have a direct contract with the end customer but has made the arrangements with the intermediary company to provide consultants, based on the requests.

The request for a consultant typically addresses a number of details, for example; role, skills, experiences, location, duration, workload and a number of few additional details,

which will determine the requested profile the customer, is interested in. An example of a customer request is presented in Table 3 below

| Title | Details |
|-----------------------------------|--|
| Project Description | Customer ERP upgrade project, target is to replace the existing ERP solution with latest version from different vendor |
| Role | Project Manager |
| Task | To manage the project as well as the project team, including the deployment into production |
| Competence requirements | ERP, SAFe methodology, typical office toolset |
| Experience | 5-10 years of experience from large projects in finance sector |
| Duration and starting date | 18 months, requested starting date on 1.8.2020 |
| Language | Finnish and English |
| Location | Capital region |
| Other | Ideally the candidate should be able to travel frequently to the customer headquarters in Belgium |

Table 3 Example of a customer request

The task for providing a suitable candidate is then for the case company to fill with the best of their ability, through their own network of consultants, either directly employed or subcontracted from other companies and Table 3 provides an example for candidate profile the case company may be requested to provide.

3.3 Analysis of the customer needs

The customer needs form the basis of the search conducted by the case company, the purpose is to find and propose a candidate to the intermediary customer, who would be as close to the request as possible. The analysis part is done in the case company; the outcome of the analysis is a profile of a candidate, which can be offered to the intermediary customer.

3.4 Description of the current approach

The current ways of handling the intermediary customer requests is described in more details below, Figure 6 illustrates the current black box type of approach, where there are inputs in the form of customer requests and outputs in the form of a selected candidate to be proposed for the intermediary customer.

Current Way of Handling Customer Requests

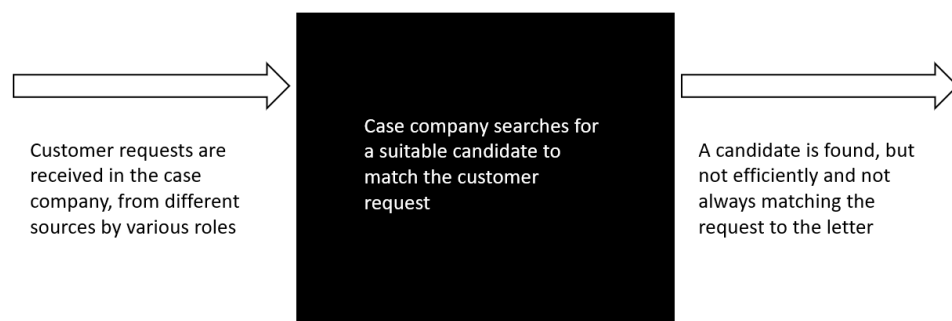


Figure 6 Current way of handling customer requests.

At first, as the Figure 6 illustrates, the case company receives a request from an intermediary customer, with several details describing the desired profile. Once the request is received, the case company analyzes and possibly requests additional information or clarification from the intermediary customer, to be able to select the best candidate to match the requested profile.

Case company searches and selects the suitable candidates, either from own employees, or from the network of people connected to the company via different platforms, for example LinkedIn or Facebook. The candidates can be either hired to be employees of the case company, or they can work through their own company, as subcontractors to the case company.

Management proposes the selected candidate to the intermediary customer, who will either approve or decline the candidate, which will then lead to finding an alternative candidate to be proposed for the assignment.

If the end customer also approves the proposed candidate, then the agreement is signed, and the process will end. The process can also be terminated, should some other company propose a more suitable candidate or if the case company fails to provide a candidate at all to the intermediary customer. There can be also some time limits for the proposal, for example, the case company must provide their candidate in two weeks or lose the opportunity.

In case the candidate is not approved, the case company usually has some time to propose an alternative candidate, within the agreed time limit.

3.5 Current approach versus customer needs

The current approach does provide candidates for the intermediary customer, but it has some limitations. The current ways of working are not very efficient; the people connected to the process are working rather ad-hoc style, case by case, so that there are no coherent, repeatable ways of working. The current ways of working also involve too many people, whose roles and responsibilities are not clear to all the participants and the selected candidates are not always matching the requests in such a way that the intermediary customer would approve them.

3.6 Key findings

The findings from the current state analysis is divided into two sections, the strengths of the current ways of working as well as the weaknesses observed and identified during the data collection.

3.6.1 Strengths

Based on the interviews, the participants indicated that there are a number of positive aspects; including the competences of the people involved as commented by several interviewees;

We have good network; we have lots of enthusiasm and talent to get the job done. Lots of good experience from this general business area, we have good potential to get this thing working. (ISO3)

There is also commitment from the management to support the change, as they have also recognized the need to improve the ways of working; this was also clearly indicated by the top management participating to the interviews:

I think what we need is, we need to organize a bit now that ISO5 came and so on and to start organizing a bit the tasks so basically define a bit more robust process. But I think it will be interesting, you know, to define those ones a bit better and try to have the people do a bit more let's say, to work in a bit more standardized way. (ISO1)

The participants were also providing a number of ideas, how to improve the current ways of working, as they have a great deal of experience from other companies, who have a more mature structure in place to support this kind of business.

We could try to create virtual teams, based on our own network of people, to walk through CVs, how to improve, what to write on them, so that the profile would be easier to sell to the customer. We can create different teams based on the experience, test manager team, project manager team. We don't have dedicated teams on focusing different business areas. But if we could get more people joining forces, maybe we can provide better ideas as a result of the cooperation. (ISO3)

The analysis indicated that there are more ideas available from the participants than the current ways of working would enable the participants to utilize in their daily work.

3.6.2 Weaknesses

The interviews also exposed multiple areas, where the improvements need to take place; most of the comments were rather similar in nature, confirming the views of others, making it easier to determine the impact of the current ways of working.

3.6.3 Unclear Roles and Responsibilities

The participants indicated in multiple interviews that they are not certain, which roles are participating in the process of handling the intermediary customer request, nor are they aware of the responsibilities of the participants, who should do what and when. This was the most common answer during the interviews, and it can be even identified to the people who are more recently joined the company, emphasizing the fact that the current ways of working are not clearly defined. One participant described the situation very directly:

We don't have a proper internal process on who has what kind of responsibility and who knows what kind of candidates and who is responsible for contacting the candidates who we have in our pool and are interested in working with us. So now when the request comes, we share the little information we have and then everybody will start running around in every direction. (ISO5)

The participants, who have been involved for a long time already, are more aware of the roles and the tasks connected, but they also agree that the documentation does not exist now, which would describe the current situation:

Like I said, the currently the process is not something that is written, it is something we know, it is something we will follow, and we are way flexible on what everybody does, right? (ISO1)

One of the participants had a long and detailed description of the roles and responsibilities, but compared to the newcomers, the descriptions were not communicated to all or adopted into the daily working routines.

3.6.4 Lack of Visibility of the Overall Process

Many participants indicated during the interviews that it is not clear to them, how the overall process works, how their tasks connect to the big picture and how they can improve their current work. One participant expressed her lack of visibility very clearly:

I don't have any visibility, I mean, there was a case where we needed a test manager in Tampere, and I found one, but actually, it wasn't supposed to be a test manager but rather some software testers in Tampere, so I go look for them. Then the case goes forwards, but I don't know if those candidates are ok or not, but most of the time they are not ok. (ISO4)

There are other views as well, which indicated that the process was clear to them, but the discrepancy of the answers would indicate that the knowledge of the current process may exist but is not shared properly with all the participants or it is not available in any written document. The first person interviewed a clear idea and understanding of how the process would go:

So, basically its either myself (ISO1) or ISO2 or then somebody sending an email to the team, to everybody saying that we have this request and then we will look into the people we have in our database to see if we have a match and if we do, we will send that profile to the customer. Of course, in between, we need to speak to the person to see if they are still available or not or what is the status. And so on. (ISO1)

But there were many more comments indicating the exact opposite:

Currently when thinking about the IsoSkills Company, we are doing things in chaotic way. One point is that there is no prioritization, no deadlines known, not enough details, also, I think we should keep things in one place. Now we get them (requests) in emails, in SMS, in excels, it makes it you know, difficult. We have some kind of process in place, sure, and it works, sort of, but it is chaotic. (ISO3)

The contradictory viewpoints indicate that the current ways of working are not clearly defined and communicated for the people involved in the process of handling intermediary customer requests.

3.6.5 No Process Description Available

The lack of process documentation was evident based on the interviews, every participant indicated that they are not aware of any detailed description of how the current ways of working can handle the intermediary customer request, and the company documentation repository does not contain any such document.

We don't have fancy tools, we don't have a CRM or this kind of stuff, we are using excel and word documents and then we are storing them in some shared drives, we are sharing them with everybody, then emails and LinkedIn accounts. (ISO1)

The management acknowledged this as well, while the other participants did not even mention the documentation as a source for information.

3.6.6 No Proper Status Checks or Follow-Ups.

Current ways of working do include a weekly meeting, where a number of items are processed; however, it is not necessarily very efficient. The participants are not always available, the follow ups are not performed always to the finest of details, and the lack of follow-ups with the submitted proposals as well as the potential candidates are not performed continuously, but rather infrequently.

In my opinion, it is not followed up at all, we were just walking through candidates and I assume that somebody will pick up the suitable ones for presentation to customers, but I don't know if it is followed up. Maybe more on those who are promoted to the customer? We don't necessary keep in touch with the candidates at all after the initial contact. I don't know... I mean, I do check the excel list from time to time, as I have lots of people in my LinkedIn network which I never added to the excel list of candidates. (ISO4)

The missing follow ups and the lack of visibility were mentioned very often by the participants, so it was a clear indication that the area needs to be improved for the future.

3.7 Conclusion

Based on the current state analysis, there were different observations and areas of improvement needs mentioned by the participants. The five participants provided insight from their perspectives and based on their roles and provided data, which leads to the following areas of improvement.

The strengths identified by the participants were connected to the management's willingness to change the current situation, they did acknowledge the facts that the current ways of working were not efficient and didn't provide the best support for the people to perform the daily activities.

The second strength commonly referred was the amount of experience of the participants and generally the employees of the company, based on their experience, there were few different suggestions brought up during the discussions which also demonstrated the willingness to adapt and to improve the current situation. This would also be beneficial for the organization during the later stages, as the resistance to change is commonly referred as an obstacle for any number of changes for the ways of working.

For this Thesis work, the focus is on three larger improvement areas mentioned most often, or which would provide the most benefits for the case company in the near future and which would offer the most needed improvements for the daily operations.

The weaknesses mentioned by the participants for the current state analysis were lack of role definitions, there were number of participants, who were not certain, who is supposed to be involved and in what capacity to handle the intermediary customer requests. There were no written documents for easy referral in case there were any uncertainty regarding the responsibilities.

Other significant area for improvement pointed out by the participants was the lack of visibility of the overall process flow of handling the intermediary customer requests, what are the necessary steps taken to follow up the daily operations. For this there were no written documents available for referral either.

The last, but not least, area pointed out by the participants, was the actual handling process itself or rather the lack of it; how the handling of intermediary customer requests is currently planned to be organized in the case company.

Based on these findings, this Thesis will focus on the three key areas; defining roles and responsibilities, increasing the visibility of the progress of handling requests, defining clear process flow and documenting the overall process.

4 Existing Knowledge of Process Development

This section discusses existing literature related to similar new companies, who are adjusting their processes to match the needs of the company, based on articles instructing the basics of process development and customer requests management. This section examines topics related to the most highlighted issues from the previous section and provides the theoretical backbone for this Thesis in the next subsections.

4.1 Theory of Process Development

Theory of process development can be simplified into describing process as a sequence of events leading from an idea to a service or product in a very broad sense. The sequence of events is based on best practices generated from experience from people participating in executing the events of the sequence. (Ponsignon et al. 2012: 8)

Best practices can be collected from other business practices, as long as those ideas can be replicated and implemented in the desired fields as well, there is no reason to create an idea from nothing, if best practices are already existing somewhere else and by adopting those best practices, the outcome of the current sequence of events would lead to a better one. (Ponsignon et al. 2012: 8)

Process development is the backbone of any successful company, as there are no large organizations which currently exist, which don't pay attention to the continuous process development, design and management. Process design aims to provide the maximum capacity to deliver the requested service of product any company plans to sell and profit from. (Ponsignon et al. 2012: 3)

The purpose of creating process flow charts, diagrams, process mapping and other visual representations of process description is to present and analyze problems visually. That method also helps to provide details and insights, how the sequence of events organized is, which parts are included, and it offers a visual opportunity for analyzing any deficiencies, delays, and other hindrances to the efficiency of the process. (Yadav & Paliwal 2012: 156)

Objective of a business process in any company is to execute logical steps in order to achieve a set of business targets. Common targets can be e.g. to develop a new product,

creating a marketing plan, processing a customer request or writing a proposal of a contract. (Davenport & Short 1990:4) Usually the objective of a process is related to cost reduction, time reduction or output quality. (Davenport & Short 1990:7)

Cost reduction is a traditional reason to redesign or to improve current ways of working in companies, even though it isn't a sufficient reason in itself. Too narrow focus on just cost cutting results to tradeoffs with other factors, which are not always approved by stakeholders. Optimizing just costs rarely brings about any other objective. (Davenport & Short 1990:7)

Time reduction has traditionally been a secondary objective in improving current ways of working, however, nowadays the importance has increased significantly, as companies are trying to distinguish themselves from competitors by offering their services quicker. There are options to reduce the time by executing process steps simultaneously rather than sequentially, however that approach is not always sufficient solution to all process types. (Davenport & Short 1990:7)

Output quality is an important area for process improvement, especially in service industries, as the quality of the service or product is the leading factor for success of any service delivery company. Quality can also be an internal factor, it may impact the company culture, learning opportunities, or leading to empowerment of employees to have greater control of their own outputs. (Davenport & Short 1990:8)

4.2 Designing a Business Process

In the current world, there are several factors that contribute to the overall success of the process and the outcome of a business in general. Customer is the most important factor of them all, the decision maker. Other factors include lead time, production volume and quality. (Sorli & Stokic 2009: 4)

Key issue for process development is to identify the areas of improvement, those areas and ways of working need to be identified and prioritized in order to be most effective of the change when creating a process or improving existing processes. The exhaustive method is to identify all processes or ways of working, which need to be improved and

to prioritize all processes based on urgency of the needs to improve. High impact approach is to identify only the most important areas or, the areas which have the most conflicts between business visions and process objectives. (Davenport & Short 1990:8)

The exhaustive approach is usually associated with information engineering, developed in early 1980s by James Martin, where the key concept is that the data of the organization defines which processes should be improved upon. The interaction of the data between different cells of a matrix inside companies define the areas for improvement. To identify all relevant processes can be very time consuming and requires vast amounts of resources to successfully execute the improvements for all of them. (Davenport & Short 1990:9)

High-impact approach benefits from the key idea to improve only the most high-impact processes or areas, which leads to more effective use of resources, which are often scarce in most companies anyways. All areas for improvement should be broken down into smaller pieces in order to keep the scope of the process improvement manageable by the participants. (Davenport & Short 1990:9)

One very relevant approach in high-impact process improvement method is to appoint an owner for the process. And the key factor is to nominate the owner from above of the organization working with the improved process area in order to provide necessary execution power for the owner to drive the change in the organization. (Davenport & Short 1990:9)

In order to improve current ways of working in any organization is to understand and measure the existing ways of work or existing process before any redesign can be done. The problem must first be understood in order to avoid repeating the current mistakes and problems in the future. Also, measurement of the current ways of working shouldn't be done for the sake of measuring, but rather by setting specific goals which need to be reached in order to provide improvements for the existing situation. (Davenport & Short 1990:10)

To design and to build a prototype of a process for any organization is not the end of the development process, but rather the first step on a longer journey with several iterations

to improve the current ways of working. Key factor for the process design is to understand the basics and to create generic design, which can lead to various organizational prototypes for further development. (Davenport & Short 1990:11)

Process definition is an important step in process design phase for any organization, as the type of the process will define the quality aspects for the process, which the organization proposes to improve. There are three major dimensions that can be used for defining a process; organizational entities, type of objects manipulated and type of activities taking place. (Davenport & Short 1990:12)

To illustrate the different types of process types, Figure 7 offers simple definitions for the aforementioned types. (Davenport & Short 1990:13)

| Process Dimension and Type | Typical Example | Typical Objective of Process |
|----------------------------|-----------------------|---|
| Entities | | |
| Interorganizational | Order form a supplier | Lower transactional costs; eliminate intermediaries |
| Interfunctional | Develop a new product | Work across geography, greater simultaneity |
| Interpersonal | Approve a bank loan | Role and task integration |
| Objects | | |
| Physical | Manufacture a product | Increased outcome flexibility; process control |
| Informational | Create a proposal | Routinizing complex decisions |
| Activities | | |
| Operational | Fill a customer order | Reduce time and costs; increase output quality |
| Managerial | Develop a budget | Improve analysis, increase participation |

Figure 7 Type of Processes

Interorganizational processes are those taking place between two or more business organizations engaging in business transactions to buy and sell services or products. Typical example of an interorganizational process is an order from a supplier. The supplier is using internal process to provide the service or a product to the buyer. Typical objective of that type of process is to lower transactional costs. (Davenport & Short 1990:14)

Interfunctional process exists between different functions or divisions, involving more people and more roles to participate in the execution of the process. It usually operates major objectives for the company, e.g. new product launches, asset management or production scheduling, where it requires management of the process across several parts of the organization. (Davenport & Short 1990:14)

Interpersonal process involves tasks within small work groups, typically within an organization or function, rather than across the entire company. This type of process type is increasing its popularity as companies are looking for more self-management from even smaller groups of people working towards common goal. (Davenport & Short 1990:14)

Process needs to have its object defined by the organization, which plans to implement a new process or when improving existing process. The objective can be categorized into two different type; physical or informational. (Davenport & Short 1990:16). The more interesting aspect from this Thesis point of view is to address the informational process objective i.e. to create a proposal.

The process activities involved in a typical informational based process type can be described in operational or managerial activities. Operational process revolves with the day to day activities carried out by the participants of the process execution in order to reach the business targets set upon them by the management. Managerial activities concern control, plan or providing resources for operational process activities. (Davenport & Short 1990:17) This Thesis focuses more on the operational aspects of the process activities.

To complete a process improvement implementation or implementing a new process for any organization, it is very important to have strong commitment from senior management. Employees of the organization need to have the feeling and support of commitment from the management to drive the participant to accept the change and embrace the new ways of working in a situation which can lead to outside of their comfort zones. It is essential for the management to identify the areas which require the support and to provide required resources to create a successful transition for the whole organization. (Davenport & Short 1990:20)

4.3 Process Definition Methods

This thesis investigates two of the more proficient methods for process development, Total Quality Management (TQM) and Quality Function Deployment (QFD). Total Quality Management has been successful in proving companies in their efforts to improve the efficiency and effectiveness and the management of their business processes, since TQM serves as a link between organizations business and performance. (Al-Ibrahim 2014: 124)

Total Quality Management involves application of operating methods and resources to improve processes, services or goods to define which customer needs must be satisfied in the current situation and in the future. The purpose is to apply management techniques, improvement ideas and tools to target the selected improvement area. (Sorli & Stokic 2009: 8)

Quality Function Deployment method is generally used for translating customer requirements into design requirements, or into service requests to be fulfilled by the supplying organization. The objective for applying the QFD method is to improve customer satisfaction, reduction of product or service deployment time and to develop customer driven knowledge base. (Sorli & Stokic 2009: 23)

4.3.1 Total Quality Management

Total Quality Management (TQM) is a collection of guiding principles to address the quality improvements of an organization. It has multiple focus areas, providing directions to the organization, i.e. how to move towards improved quality. The main principles of TQM are; customer satisfaction, deployment of policies, involvement of all personnel, ongoing improvement, management of data and management by processes. (Sorli & Stokic 2009:9)

Customer satisfaction is integral part of any service delivery business, as the customers are the sole reason a company will be able to do business. All company efforts should target the maximum customer satisfaction by offering the best possible service or product for the customer. (Sorli & Stokic 2009:9)

Deployment of policies in the Total Quality Management sphere require that business objects are deployed and utilized in all levels of organization, that all participants are executing the policies adopted by the organization to support the business processes. (Sorli & Stokic 2009:9)

Involvement of all personnel is essential to reach all business targets, team work is the core of company culture, as the contribution towards common goals are needed in order to provide the best possible results. This requires the empowerment of employees to get the maximum effort. (Sorli & Stokic 2009:9)

Ongoing improvement can be obtained by implementing the “plan-do-check-act” (PDCA) cycle, to introduce the organization to the concept of continuous improvement. The concept is accredited to the Six Sigma development method. (Lunau et al. 2009: 263) Figure 8 illustrates the PDCA cycle below.



Figure 8 PDCA Cycle

The Figure 8 describes the four parts of continuous improvement method by focusing into four actions, which can be used in all organizational levels. Planning phase describes the activities of defining the problem, collecting the data to perform an analysis of the problem.

Do phase define the activities included in developing and implementing a solution identified earlier in the cycle in the Planning phase. It includes all activities required to complete the Do phase before moving to next phase. After the Do phase is completed, the activities move to Check phase, where the results of the Do phase are verified, by data analysis. The final part of the PDCA cycle is to provide recommendations and documentation based on the previous phases of the cycle. (Sorli & Stokic 2009:10)

Management of data and management by processes define the information, which is used to manage the process and the outcome of the process and the process itself, which will lead into more lean organizations by providing the toolset to improve the organizational effectiveness. (Sorli & Stokic 2009:9)

The Six Sigma toolset also provides a method for defining processes, called DMADV, it consists of five phases; Define, Measure, Analyze, Design and Verify. (Lunau et al. 2009: 10). Figure 9 illustrates the design cycle below.

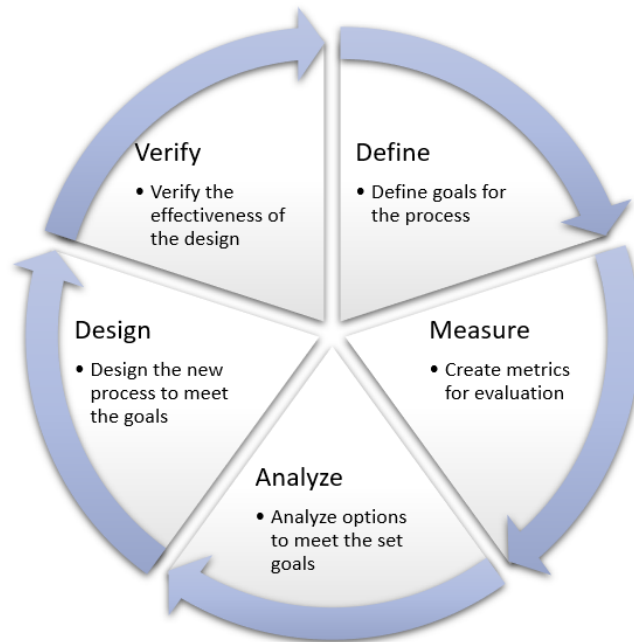


Figure 9 DMADV Cycle

Figure 9 offers few more steps for process development compared to the previously described PDCA cycle. DMADV development cycle is split into five different steps, each one concentrating into a smaller aspect of process development.

Define phase identifies the purpose of the process, the objectives of the process, the outcome and the goals the process wants to achieve, once it is implemented into practice. In this phase the needs are translated into requirements.

Measure phase defines the metrics and the data collection, which the process plans to utilize during the execution of the process. All relevant data is identified and recorded for the next phase of the cycle.

Analyze phase analyses the data collected in the previous phase, to analyze relevant options to meet the targets set in the first phase of the cycle. The initial process is tested, and the metrics used to measure the process is then analyzed during this phase.

Design phase defines the process flow, based on the analysis from the previous phase in order to create a process to accomplish the targets set earlier in the process development cycle.

In the last phase, verification is done for the process in order to reach the conclusion of the effectiveness of the of the new process based on the set targets, collected data and set measurement methods. The outcome of the final phase of the process development cycle is the final product or process ready for implementation for use by the organization. (Selvi & Majumdar 2014: 17-18)

This Thesis adapts the concept of DMADV for describing the proposal of an intermediary customer request handling process.

4.3.2 Quality Function Deployment

Quality Function Deployment (QFD) was initially developed in Japan, with the principal idea of translating customers' requirements into design requirements and it has become a proven method to improve multiple factors in business process, e.g. customer satisfaction, reducing product cycle times and lowering startup problems. (Sorli & Stokic 2009: 22)

The idea can be summarized as structure process which aims to gather the customer view and translate that into process design requirements, while receiving contributions from all participants to the execution of the process. (Sorli & Stokic 2009: 23)

Quality Function Deployment is a method frequently used as supportive method to structure and systemize sequence of steps and operations which are not properly executed in organization, when executing a process for service delivery or manufacturing goods. (Sorli & Stokic 2009: 23)

The main aspect of the Quality Function Deployment is the handling of information, it helps to structure it, classify it, while promoting cross functional participation, i.e. all relevant personnel would be involved in all stages of production, in order to guarantee no scenario would go unnoticed through the development process. (Sorli & Stokic 2009: 23)

The benefits of utilizing Quality Function Deployment method are differential performances, reduction of development time and reduction of engineering changes.

Differential performances are promoted by the Quality Function Deployment method and it enhances the performance of team members by boosting the search of new excellent ideas and performance improvements for process execution. (Sorli & Stokic 2009: 24)

Reduction of development time is achieved by utilizing cross functional teams while involving multiple participating teams from several functions simultaneously. This leads to shorter time to market values, increasing the success possibilities of the organization. (Sorli & Stokic 2009: 24)

Reduction of engineering changes is achieved by the above activities, involving multiple functions to operate during all stages of the process, in order to improve the effectiveness and quality of the participating teams. This is achieved by participating of all functions to make sure all requirements are met during the process execution. (Sorli & Stokic 2009: 24)

These matrixes would be able to pinpoint all information relevant to each stage of the process. The matrix of relevant actors can be applied into creation of a process model to describe the corresponding lines to responsibilities and actions connected to each step of the process.

For the roles and responsibilities, more details are given in the following subsections, so that the last subsection gives a full picture of how this Thesis will prepare a proposal for the case company to address the original business case.

4.4 Roles and Responsibilities

The importance of roles or actors in any process is significant in several ways. The roles are defined to give the participants a greater understanding of who are involved and what they are supposed to do at any specific time of the process.

A Project Management process utilizes a responsibility assignment matrix to determine the responsibilities of project management tasks and assignments of the project re-

sources. (Project Management Institute 2013: 262) An example of a responsibility assignment matrix is a RACI matrix, a shortened term to indicate different type of responsibilities; Responsible, Accountable, Consult and Inform. Table 4 below illustrates a typical format of a RACI matrix.

| RACI Matrix, example | | Person | | | | |
|---|------|--------|------|------|------|------|
| Activity | ISO1 | ISO2 | ISO3 | ISO4 | ISO5 | ISO6 |
| Create process | A | R | C | I | I | I |
| Collect data | A | C | R | C | I | C |
| Define requirements | A | C | I | R | I | C |
| Submit change request | A | C | I | I | R | I |
| Develop test plan | A | C | I | I | I | R |
| R = Responsible, A = Accountable, C = Consult, I = Inform | | | | | | |

Table 4. RACI matrix example

As depicted in Table 4, the principle idea of the matrix table is to have only one person to be accountable for any given assignment in order to clarify the levels of authority over the assignments. The person responsible for completing an assignment can be both accountable as well as responsible. Consult and Inform are usually less active or less important for the actual completion of the given assignment, even though their inputs are relevant for the assignment.

The RACI matrix can be used also in process development, to create an easy to understand type of table to indicate who is responsible to perform any kind of assignment connected to the actual process execution. (Project Management Institute 2013: 262)

Regardless of the method used for describing the roles in the process execution, the main idea is to clearly identify the unambiguous owner of each assignment, who all have solid understanding their own responsibilities. (Project Management Institute 2013: 261)

Responsibility is basically the combination of applying the authority and competence to the role for any given assignment within the execution of the process (Project Management Institute 2013: 264). Responsibilities can vary from a very small fraction of the total activities of the process execution to the overall responsibility of the owner of the whole process. Each of the tasks assigned to a role connected to the process execution is needed for the successful completion of the process.

4.5 Process Flow Description

The business process can be described by two modelling domains, i.e. entity domain and behavior domain, which have distinct differences regarding the activities connected to the domains. Behavior domain describes the activities and their relationships between, and the entity domain describes the resources performing the activities and how those are organized. (Jonkers, H. & Franken, H. 1999:2)

The level of maturity and the one important factor for the process development activity is the level of abstraction, i.e. should the process be on a high level with very little details, or should it be on a more detailed and lower level of abstraction. (Jonkers, H. & Franken, H. 1999: 2)

On higher levels the actors involved in the process execution are teams, departments or business units, and the timescale in days, whereas on the lower levels, actors are individual people and the timescale can be minutes. (Jonkers, H. & Franken, H. 1999: 2)

One final aspect to be considered, when defining the process flow, synchronizations, the actors involved need to be able to perform the actions in a certain order. There are activities, which must be completed before the next step can started in predefined order. (Jonkers, H. & Franken, H. 1999: 2)

4.6 Defining Process Steps

The basic steps needed for process definition can be divided into five, separate, yet equally important, steps. There are number of different models, which can be used as a template for defining the necessary steps in very basic levels. This Thesis investigates

the adaptation of project delivery model to define the basic steps, based on a template described in detail below.

Project and process phase is basically a collection of logically related actions and activities, which will result into a delivery of a service or a product as an outcome, when all steps have been executed in predetermined sequence by participants. (Project Management Institute 2013:40)

Step based structure allows the separation of tasks into different steps, which can be broken down into smaller pieces to help the easier management and execution of activities connected to each step. This is also helpful when connected to a responsibility area matrix to determine roles and responsibilities of each task in each step. (Project Management Institute 2013:41)

Figure 10 illustrates most common template of steps in a project management process.

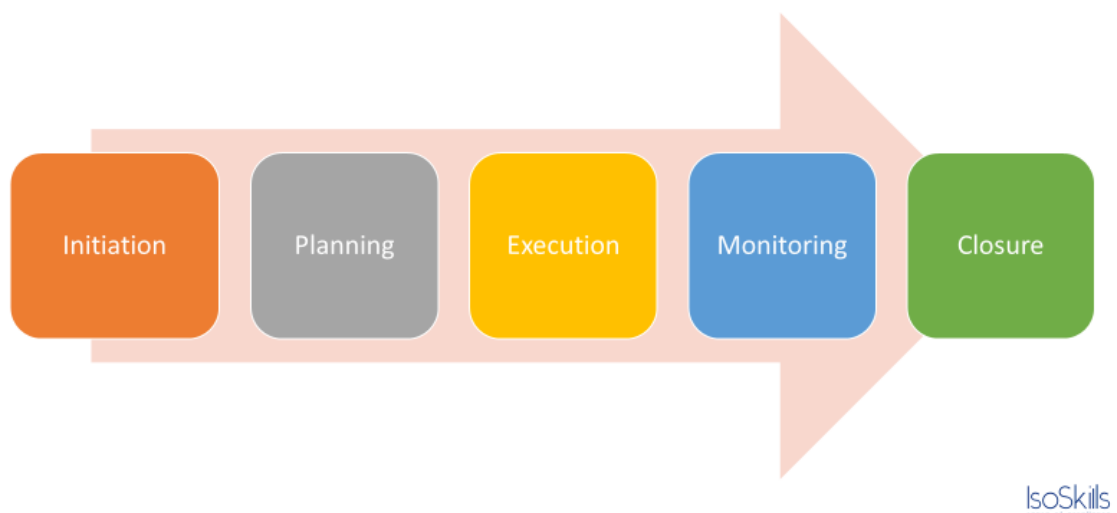


Figure 10 Project Management template

As Figure 10 describes, there are five basic steps included in this process delivery template. First step defines the requirements for the process or project, what are the entry criteria to initiate a project. These details are commonly received from customer, either from internal or external. (Project Management Institute 2013:54)

Second step includes the planning activities, how the project or process will be executed, based on the requirements from the first step. It is very important to realize the common situation of changing requirements during the execution of the process. (Project Management Institute 2013:55)

Third step defines the execution of the plan, to complete the work detailed in the planning phase in step two. All the details required to complete the work needs to be addressed and all steps must be covered during the execution. (Project Management Institute 2013:56)

Fourth step includes all activities necessary to track, review and manage the progress and performance of the process. This step also includes the identification of any required changes to the plan and implementing those changes. (Project Management Institute 2013:57)

Fifth step defines the activities required to close the process, the ensure the delivery of the process outcome defined in the very first step of the process flow. This can also include documentation of lessons learned, post-delivery review and any other assessment of the success or failure of the delivery. (Project Management Institute 2013:58)

By following each step in logical order, the organization can deliver the requested service or product and follow up the progress of the case. The above described steps can be implemented into various fields of business, with small variation.

For the people acting in the process flow, it is relevant to be able to follow up the activities and the synchronizations, so that they are able to interact with each of the other roles involved in the execution of any process. (Sorli & Stokic 2009: 99)

The principle of documenting is that the actions and activities are described in enough details that all actors can perform the assignments with ease and efficiently. This becomes more relevant the bigger the organization grows, the more complex the process evolves. The importance of documentation should be clear to all parties involved. The organizations need to set up data repositories to address the needs for common documentation. (Sorli & Stokic 2009: 100)

4.7 Conceptual Framework of This Thesis

For this Thesis, the conceptual framework is built to answer the weakness areas described in the Section 3, Current State Analysis and when combined will produce the basis for the proposal of the structural framework for handling intermediary customer requests in the case company.

Figure 11 below describes the conceptual framework and the key components of it, with the connection to the findings from Section 3.

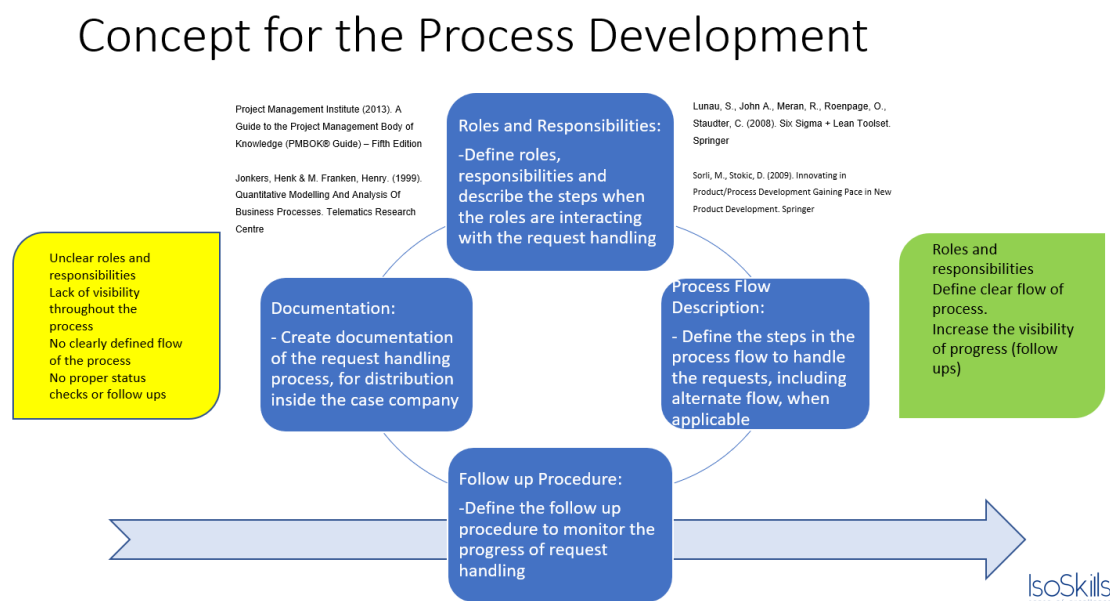


Figure 11. Conceptual Framework

The key components of the conceptual framework are described in Figure 10, by adding the elements from the current state analysis and from the literature analysis into the same layout.

The first element are the weakness areas, which are described in the yellow box on the left side of the Figure 10. The weakness areas identified from the current state analysis consisted of unclear roles and responsibilities, no clear definition of the process and the lack of visibility of the process, including the follow up and status checks.

The second element of the conceptual framework are the improvement areas and activities selected for the proposal of the new process for handling the intermediary customer requests. Those actions are described in the blue boxes and the literature sources used to identify the common methods the industries have used for tackling similar issues in other relatively new and already established companies in similar fields of business.

The improvements listed in the blue boxes are roles and responsibilities, process flow description, follow up and status checks and documentation. These will form the basis of the proposal described in Section 5.

The third element of the conceptual framework is the outcome of the process development work, the proposal for the process of handling intermediary customer requests in the case company. These activities are described in the green box on the right side of Figure 10.

The green box describes the activities; roles and responsibilities are defined, process flow is defined, the status checks and follow ups are defined and all above are documented and published in common repository, so that all parties and actors involved in the process execution can access the data.

The fourth element of the conceptual framework is the selection of color of the boxes and the large arrow indicating the movement of time. In the beginning the yellow box will be combined with the blue boxes over time and gradually both will evolve into the green, which in many project and process management statuses indicate that the situation is correct, or rather targets have been reached.

With these elements now defined, this Thesis will progress to describe the proposal for handling intermediary customer requests in Section 5.

5 Building a Proposal of Handling Intermediary Customer Requests

This section combines the data from the current state analysis from section 3 and conceptual framework from section 4 and describes a proposal for handling intermediary customer requests for the case company.

5.1 Overview of the Proposal Building Stage

The current state analysis described in section three highlighted findings and observations based on the interviews of the participants from the case company. During the interviews, the participants were able to identify a number of improvement actions and areas to focus on this investigation. To support the proposal building, relevant best practice was found from a few selected literature sources.

The most common findings from the current state analysis focused on the roles and responsibilities, the lack of documenting those for the participants and the general lack of information regarding how those roles are connected to the handling of intermediary customer requests.

The second observation concerned the actual process of handling the intermediary customer request, it was not clear to all participants, how the process or ways of working are designed in the case company, when the participants should act and how the end-to-end handling of intermediary customer request is supposed to be executed. The lack of documentation did not help the situation; there was no support available from the company documentation.

The proposal building started from the basics, by breaking down the elements from the general process and project management aspects. The stakeholders from previous data collection phase were invited to participate, but the major contribution can be divided between ISO1, ISO2 and ISO5. Unfortunately, ISO 3 and 4 were not able to participate for this data collection phase due to other commitments.

First, there must be actors who have different roles involved in any process and in general project management. Those roles must be nominated, and the selected roles must have some responsibilities to act upon during the execution of any business process.

Second, the actual process flow was broken down into smaller pieces to identify the actions performed by the case company in correspondence to the intermediary customer, what activities were identified during the processing of the intermediary customer requests. Once those actions were identified, the steps were recorded and placed on time line to address the synchronization needs for the connected roles.

The third step to build the proposal was to document the actions and participants, who were involved, why and when those actions should be performed. The emphasis was to have at least some written instructions and documentation to support the daily operations instead of having nothing in the common repository to use.

5.2 Findings of Data Collection 2

The current state analysis discussion and later sessions with the participants have produced few suggestions and ideas, how to improve the current ways of working. Table 5 below describes the most relevant suggestions by the key stakeholders. The suggestions and ideas are grouped into a formatted table for further analysis.

| | <i>Key focus area from CSA</i> | <i>Suggestions from stakeholders, categorized into groups (Data 2)</i> | <i>Description of the suggestion</i> |
|---|--------------------------------|---|---|
| 1 | Roles and Responsibilities | Define the roles and responsibilities connected to the process | There should be detailed description of roles, who does what, how those roles act during the process and what is the RACI matrix or equivalent responsibility table |
| 2 | Process Flow Description | Define the process steps for handling intermediary customer requests | Process description available, describing the necessary actions in each step from end to end during the execution of the process of handling intermediary customer requests |
| 3 | Documentation | Create relevant documents to describe the process, roles and responsibilities | Create documentation of elements 1 and 2 to support the participants of the process execution. |

Table 5 Suggestions from Stakeholders

Table 5 describes the common ideas and suggestions brought up by the stakeholders from the case company. There are a few more detailed suggestions, which are analyzed further in the subsections below. The main idea behind the suggestions is to build the

basic components of ways of working and purify them into a working process model for the case company. There were no high-level and fine-tuning type of suggestions, but rather very basics, like for example to produce a written process model of the handling of intermediary customer requests as there are currently nothing even closely resembling a written instruction.

5.3 Roles

At first, it was clear to determine the actual roles involved in the process of handling intermediary customer requests inside the case company, who are the people and what actions should they perform during the execution of the process. The roles connected to the process are based on the responsibility areas and to the relevant roles operating there already. The idea was not to discover and develop new roles to support the process, but rather identify the existing roles and define the connection to the new process.

The responsibility areas involved during the current state analysis can be broken down into three major components: sales, recruitment and management for decision-making. Each area has a role, which can contribute to the execution of the process of handling intermediary customer requests.

5.3.1 Sales

Sales is the first point of contact with the intermediary customer, due to the responsibilities in customer management, sales will receive the customer request first and will initiate the execution of the process of handling the intermediary customer request.

Sales has the responsibility to record the request to the case company tools, and provide this information further to the organization, stating that the case company has received a request for a consultant and providing all relevant details for the other parties to start the process.

After the initial request has been recorded into the case company's database, Sales will notify recruitment to start processing the request in the next step of the intermediary customer request handling process.

After recruitment has completed the search for a candidate and the management has made the decision and chosen the most suitable candidate, Sales will promote the selected candidate to the intermediary customer and follow up with the intermediary customer any possible feedback.

If the candidate is accepted and the end customer interview is confirmed, sales will take an active owner role of the case and follow up with intermediary customer any necessary steps required by the end customer to ensure that the interview is done and prepared for.

In case the original candidate is not approved by the intermediary customer, Sales will hand over the case back to recruitment to do another search, or in case there are already other candidates the case company can offer to the intermediary customer, then Sales need to request Management decision to select an alternative candidate and promote the new option to the intermediary customer.

Once the end customer approves the candidate, Sales will continue the discussion with the intermediary customer in order to agree the possible open items and prepare for the contract, in case it is needed. There may be already some frame agreements in place, which usually cover the rate, the termination period, changing of a candidate during ongoing assignment and many other important aspects of the mutual agreement between the two parties.

For any management decision needed, Sales can request a decision or guidance from management to cover any open details in the last two steps of the process to support Sales in the process execution.

5.3.2 Recruitment

After Sales has initiated the process execution of handling an intermediary customer request, the next area of responsibility is recruitment. In the case company context, the recruitment team will be responsible for analyzing the intermediary customer request, what type of competences, experience or any other defining characteristics the end customer is looking for.

Based on the initial analysis of the request, the recruitment team needs to inform sales, in case there is a need for any additional information to identify the potential perfect match profile, which the search will be based on.

Once the profile analysis is completed, the recruitment team will start searching for a matching profile of a candidate, either from existing database of consultant profiles from previous searches, or from online resource databases, such as LinkedIn or Facebook or other relevant sites providing the possibility to connect jobs to workers. This is the most important phase of the process, as good candidates are the key for the next steps.

Once the recruitment team identifies matching candidates, they must interview the candidates to develop an understanding of the candidates, their motivation, their needs, and their willingness to accept the offered consultancy agreement. There are many different factors in selecting the right candidate, but ideally the selected one should be matching all the requirements of the customer request and is available for the indicated starting time of the new customer assignment.

5.3.3 Management

The role of management in the process of handling an intermediary customer request is to give support and make decisions during a few selected steps of the process execution phase and provide necessary guidance to the participants regarding the direction the process needs to go.

The decision point of choosing the candidate to be promoted for the intermediary customer requires management involvement, mainly to make the decision, that the selected candidate would be the most suitable one. The decision making can be done in a joint discussion, involving other roles from Sales and from Recruitment to offer all the necessary details regarding the options to choose from, or it can be done without the consultation, if all necessary details have been provided prior to the decision-making situation.

The decision can also be that there are no suitable candidates available for further processing, the decision to stop the process at this step may also be necessary in order to turn the focus to the next case and stop the unnecessary work by Recruitment team.

The second and third step where the management guidance is needed is after a candidate has been selected to be promoted and given to the intermediary customer for further processing, as the financial details may need some fine tuning and approving by the management.

5.4 Responsibilities Illustrated as a RACI Matrix Table

As discussed in previous section 4, one method to illustrate the responsibilities of roles during a process execution is to utilize a responsibility assignment matrix, a RACI matrix. The RACI matrix for this case should consist of the roles mentioned in previous subsections and allocate responsibilities in each specific task related to the execution of the intermediary customer request handling.

RACI matrix consist of four different types of responsibilities, R = Responsible, A = Accountable, C = Consulted and I = Informed. Based on each step of the process execution, different roles have different level of responsibilities, indicated by the corresponding letter.

In Table 6 below, the relevant tasks and roles have been assigned into a RACI matrix to illustrate the different tasks and responsibility levels during the execution of the process.

| Process Step | Task | Sales | Recruitment | Management | Notes |
|--------------|---|-------|-------------|------------|---|
| 1 | Receive intermediary customer request | R | I | I | Usually the sales splits the responsibility with management, depending of the customer |
| 1 | Create an entry in to the database | R | I | I | |
| 1 | Assign the case to Recruitment | R | C | A | |
| 2 | Analyze requests | I | R | I | |
| 2 | Search for a candidate based on requested profile | I/C | R | I | |
| 2 | Interview candidates | I/C | R | C | |
| 2 | Select matching candidates | I | R | A | |
| 3 | Choose the candidate the be promoted to intermediary customer | C | C | R | |
| 4 | Deliver the candidate profile to the customer for evaluation | R | I | A | |
| 4 | Arrange the possible interviews with customer | R | C | A | |
| 5 | Create agreement material for the case | R | I | A | Unless there is some type of frame agreement already in place, then there is no need for negotiations |
| 5 | Sign the agreement and agree the delivery date | R | I | A | |

Table 6 RACI Matrix

As Table 6 illustrates, different responsibilities have been assigned to the participating roles, with different level of authority during the process execution. Sales is responsible for the actions related to the customer interface, whenever there is a need to interact with the customer.

Recruitment has the responsibilities connected to the analysis and searching the most suitable candidate for each intermediary customer request and handling the selected candidate until the case is closed, either when the candidate is accepted to the customer project or until the candidate has been rejected by either intermediary customer or end customer.

Management has the role to support the actions during the execution of the process and during any conflict scenario, when there are for example several cases active. Management decision is needed to determine which of those active cases the current resources need to focus, or if there is a need to stop the process execution during any step of the process.

In general, sales and recruitment can act independently, as long as management is informed and consulted whenever there is a need. In the end, management is accountable for success and failure of the process and business eventually.

5.5 Process Flow Description

Based on the current state analysis and the literature research, the process should be simple for the case company, as the maturity level is fairly low. There is a need for basics, not for the latest industry standards for companies who have had decades to improve their business processes. By introducing five separate steps for the process of handling intermediary requests, the process flow can be described in the subsections below.

5.5.1 Step One

In step one, the case company receives a request from an intermediary customer to provide a candidate for a consultancy project for an end customer with additional details

describing the required competences, experiences and starting date as well as some financial details, in case there are no prior agreements in place. The request is assigned to a responsible person to start the analysis.

Roles, which participate in the execution of the process in step one, are from sales and recruitment, as described in section 5.4 on the RACI matrix. The tools used are usual office type of tools to record the request in the database and communicating the status to other relevant parties via email.

The status of requests should be followed up on a weekly status check meeting, in order to inform all relevant parties of the progress and to make sure all requests are processed by responsible roles.

5.5.2 Step Two

In step two, the request is analyzed by recruitment in order to create an understanding of what kind of candidate profile would be the most suitable to meet all the requirements of the intermediary and end customer for the candidate. In this step, recruitment should verify from Sales that all relevant details are provided for the case company and ask for clarification of missing details if needed.

Recruitment will initiate a search for a candidate who would match the competence profile created from the analysis of the requirements and contact number of promising cases to check their interest and availability for the consultancy case. At the end of step two, there should be a few selected candidates listed in order to be able to move to step three.

Roles active in step two are Recruitment and Sales, while most of the activities are taken care by Recruitment. Tools are normal office tools, to update the case information in database and LinkedIn and other similar job advertisement internet-based tools which offer profiles of professional candidates.

The status of requests should be followed up on a weekly status check meeting, in order to inform all relevant parties of the progress and to make sure all requests are processed by responsible roles.

5.5.3 Step Three

In step three, the short-listed candidate profiles from step two are reviewed with the support from sales and management to identify the most suitable candidate for the case. If needed, interviews of the selected candidates would take place in order to get the understanding of the motives and personalities and to see how well those would match the case company's professional profile.

After the interviews are completed, the candidate profiles would be ranked from most suitable to least suitable and with the help of management, the decision to proceed with the most suitable candidate would be done. In case there are no suitable candidates available, due to various reasons, availability, missing competences or languages, management may need to stop the process for proceeding and change the focus of the team to start the execution of another request, if applicable.

Roles in step three are recruitment and management, and the emphasis is that recruitment is responsible for presenting the candidates and management to make the decision, which candidate is selected as the most suitable.

The tools used are normal office tools and email for communications, and in case not all people are available for face to face meetings, some type of communications software, like Skype or similar is used for teleconferencing.

The status of requests should be followed up on a weekly status check meeting, in order to inform all relevant parties of the progress and to make sure all requests are processed by responsible roles.

5.5.4 Step Four

In step four, the selected candidate from step three is presented to the intermediary customer as case company's preferred option to match the intermediary customer's requested profile. The intermediary customer will review and verify the candidate with their own methods and process, which is not visible to the case company and will either approve or disapprove the candidate.

In case the proposed candidate is approved, the process will proceed to step five, and in case the proposed candidate is not approved, then the process will move back to step two for further analysis. There may be some additional information available after the intermediary customer review, which may lead to building a different type of competence profile, which can be then used for a basis of a search.

Alternatively, there is a possibility to end the process completely, if there are no other suitable candidate profiles available for promotion to intermediary customer after the initial disapproval of the original candidate. This would require a new management decision, if it was not already discussed in step three.

Roles in step four are sales and management, as the activities are performed in the customer interface, and the tools used are normal office tools as well as emails and phone calls for communications purposes.

The status of requests should be followed up on a weekly status check meeting, in order to inform all relevant parties of the progress and to make sure all requests are processed by responsible roles.

5.5.5 Step Five

In step five the selected candidate is proposed to end customer for approval, as in normal case, the intermediary customer doesn't always have the final decision-making authority, unless they are planning to utilize the proposed candidate in their own project work.

In case the end customer approves the proposed candidate, the process ends in step five. There can be some agreement negotiations in case there are no frame agreements in place, but from intermediary customer request perspective, there are no actions left to perform by the case company.

In case the end customer doesn't approve the proposed candidate, the process will move to step two to search for more suitable candidate to match the needs of the end customer. Or, if there are no suitable candidates to promote, management can make the decision to stop the process. In some cases, if there are more than one suitable candidate, it is possible to promote the next one to the intermediary customer in step four, but that is more of an exception to the process execution.

Roles in step four are sales and management, as the activities are performed in the customer interface, and the tools used are normal office tools as well as emails and phone calls for communications purposes. The emphasis is more on sales however, the decision making of management is essential in case there is no possibility to reach an agreement with the customer.

The status of requests should be followed up in weekly meetings as in previous steps. However, in step five the emphasis is to make sure the process is completed and reported to the database with reasons for early termination as well as reasons what convinced the end customer to approve the selected candidate.

5.5.6 Completed Process Flow

To summarize the previous subsections, Table 7 below illustrates the completed process flow of the previously described five process steps to handle intermediary customer requests

Completed Process Flow

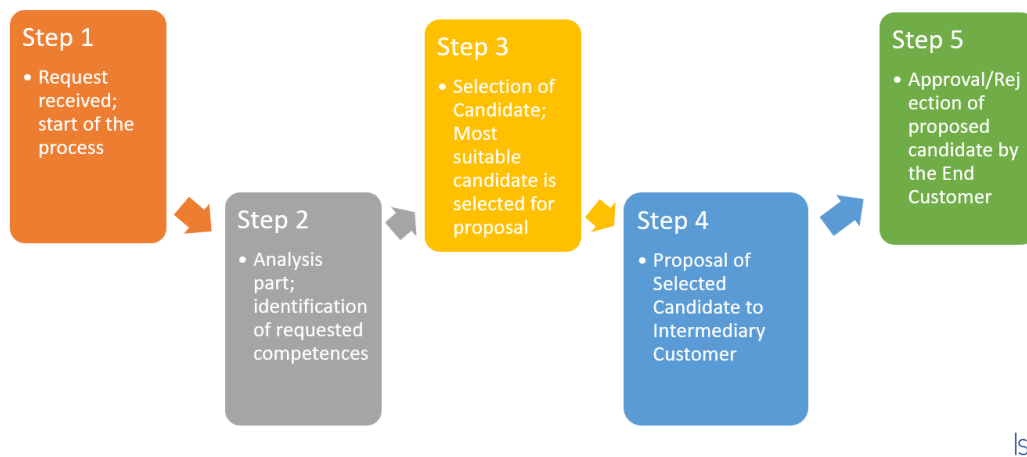


Table 7 Completed Process Flow

Table 7 illustrates the basic five steps in a single picture, how the five process steps are connected to each other and the high-level action, which would take place during each step.

5.6 Documentation

As discussed in previous sections, documentation is essential for process execution, from the roles and responsibilities to management of candidates and from the search for matching candidates to agreement negotiations. For all roles connected to the process execution it is important to be able to verify the next steps from documentation in order to be able to perform all relevant tasks in correct sequence.

As the case company is rather small from the number of employees' perspective, there is no need for massive customer relationship management (CRM) tools to manage the customer and candidate data. However, this item may become more relevant in the future, should the case company grow in employee numbers to much larger, so that the normal office tools are not the most efficient solution to manage large amounts of data.

The proposal of this Thesis is that the case company would determine to collect and record the process description to one document and publish the location to all relevant roles for further use. Roles and responsibility (RACI) matrix should also be written into a document and published as well.

For the daily work point of view, the most important data to be collected and saved for common use are the intermediary customer requests and the additional details collected and analyzed during the process execution, as the information will be very useful for the next assignment in case the process is not completed with a successful outcome. All additional information can be used in the future for a more successful approach. Also, some of the discovered candidate profiles can be utilized later in some other requests, which means the work is not done for nothing.

The currently used tools, office type of toolset is good enough to support the needs of the case company, as there is rather a small pool of people participating in the process execution. However, as mentioned above, this may change in the future. This Thesis doesn't investigate the possible tools themselves, or the need of tools for the future, but rather focuses on the current situation.

5.7 Proposal Draft of Handling Intermediary Customer Request Process

In order to summarize section five, Table 8 below illustrates the combination of the previously discussed elements of the proposed process of handling intermediary customer requests in the case company's point of view in one single table.

Proposal for Intermediary Customer Request Handling process

| Process steps/ Actions | STEP 1 | STEP 2 | STEP 3 | STEP 4 | STEP 5 |
|---------------------------|--|--|--|--|--|
| Process flow | Customer request received by the case company Assigned to a person to start the processing of the request | Responsible person starts the request analysis; role, duration, competence Based on profile, starts searching for a match | Matching profile found and contacted CV is reviewed and polished to match the customer request If no matching candidates are found, end of process | Selected candidate is presented to the requesting organization If approved, sent to the end customer for interview If not approved, back to step 2 | End Customer approves the candidate -> Contract signed -> End of process End Customer declines the proposed candidate -> Back to Step 2 |
| Roles | Sales, Recruitment | Recruitment | Recruitment, Management | Sales, Management | Sales, Management |
| Responsibilities | Start the activities, record the request | Analysis of the request, search of the candidate | Interviews, decision making: GO/NO GO | Customer Management | Agreements, operational decisions |
| Documentation | Request is logged into process list | Progress is recorded into a follow up document | CV, backlog of candidates | CV, contact data, feedback | Agreement |
| Follow up | Status checks, weekly basis | Status checks, weekly basis | Status checks, weekly basis | Status checks, weekly basis | Status checks, weekly basis |
| Tools | Office tools, emails | Office tools, emails, LinkedIn and similar databases | Office tools, emails | Office tools, emails | Office tools, emails |

Table 8 Proposal for Intermediary Customer Request Handling Process

The proposal is divided into five steps as discussed earlier, in a matrix format to include the important elements for addressing the findings from the current state analysis in section three as well as the findings from relevant literature sources in section 4. The process will progress in sequence from step one to step five in order. Each step must be completed before the process can progress to the next step.

The proposal consists of process flow description, in high level, described in the first row, to determine the activities, which must occur in each step of the process execution. It also describes those situations, when there may occur a transition backwards due to various reasons and into which step the process execution must jump to.

The second row describes the roles connected to each step, the major participants, and a more detailed list of responsibilities is described in section 5.4 when the RACI matrix is introduced with all roles who have actions to perform in each step.

The third row summarizes the responsibilities of the roles in each step in high level, for easier understanding of the essential actions to be taken in each step by the relevant actors. More detailed description was discussed in section 5.5, when the steps were described one by one.

The fourth row indicates the documentation each step either produces or is processed during the process execution. It is assumed that the responsible roles are the main producers of those documents, however it may vary from step to step, as some of them are delivered by third parties outside of the case company, for example CVs and contractual materials.

The fifth and sixth rows describe the follow up procedure and the tool used in each step of the process execution. These are most suitable for the current size and needs of the case company, however, as discussed in section 5.6, some more elaborate CRM tool may become necessary in the future, depending of the growth of the company and the amount of people connected to the process execution.

This proposal covers the findings from the current state analysis; the lack of process description, unclear roles and responsibilities and the lack of documentation. As a summary, the proposed process for handling an intermediary customer request is described in this section and should be validated in a small scale pilot before large scale implementation can take place in the case company.

6 Validation of the Proposal

This section discusses the results from the validation stage of this Thesis and indicates a few development ideas and updates to the initial proposal for a process to handle intermediary customer requests in the case company. At the end of this section, this Thesis will present the final proposal for the process of handling intermediary customer requests as well as recommendations for next steps.

6.1 Overview of the Validation Stage

The proposal was based on the current state analysis performed in the beginning of the Thesis work by involving the key stakeholders of the case company to provide their opinions regarding the ways of working regarding the handling of intermediary customer requests in the case company.

The analysis provided three main areas of improvement, *lack of definitions of roles and responsibilities, lack of process description and general lack of visibility of the process flow*. Also, it was pointed out that there was *no documentation available to support the participants in their daily work*.

The proposal was built based on those findings as well as relevant literature research on the topic. The idea was to keep the process model simple enough to support the activities of the participants but detailed enough to give support in most common situations, which may occur while processing the intermediary customer requests in the case company.

The validation of the proposed process of handling intermediary customer requests was concluded by introducing the proposal to the key stakeholders in a workshop, so that most of the earlier participants, ISO1, ISO2 and ISO5 were present and were able to give comments and feedback to the author. Unfortunately for this data collection phase, ISO 3 and ISO4 were not able to participate.

The proposed process model was introduced and walked through one step at the time and all actions for each role were discussed in detail as well as the overall responsibility area matrix (RACI matrix) to further illustrate the different responsibility levels involved in the execution of the complete process of handling intermediary customer requests. The proposed process model covered all findings of the current state analysis.

6.2 Feedback from Walkthrough of the Proposed Process Model

During the proposal walkthrough in a workshop, the participants gave a few comments and improvement ideas to update the proposal with some selected details. The purpose of this section is to address them and build the final proposal based on the initial proposal with the comments and feedback given during the validation phase.

Table 9 below lists some of the more relevant ideas and improvements proposed by the key stakeholders.

| | <i>Key focus area from CSA</i> | <i>Suggestions from stakeholders, categorized into groups (Data 3)</i> | <i>Description of the suggestion</i> |
|---|--------------------------------|--|--|
| 1 | Roles and Responsibilities | Roles in the proposal are more high level | Instead of calling roles; Sales, Recruitment and Management, you should have used proper role names, like Sales Manager and Recruitment Specialist |
| 2 | Documentation | Create the proposal in a power point with flow charts | Please provide the process flow in power point format, it is quick and easy reference guide for new people as well. |
| 3 | Documentation | Tools used in the future | Should we consider some CRM tool for the future? Do we need one? |
| 4 | Process Flow | Finetune the presentation | Include the roles in different colors |

Table 9 Feedback from Workshop

Table 9 illustrates the more relevant comments and feedback from the validation workshop, some other comments were also recorded for future use. However, those fall outside the scope of this Thesis and are more relevant to the overall business process, including the sales and marketing aspects.

Most of the findings are related to the presentation format of the proposal and how the actual process flow was presented and not related to the substance of the proposed process for handling intermediary customer requests.

6.3 Developments Based on Findings

The feedback given by the key stakeholders indicated some changes into the proposed process for handling intermediary customer requests. A major change would concern the roles participating in the process execution. In the original proposal, the roles were sales, recruitment and management, and according to the feedback from the workshop those terms are too vague and do not indicate precisely who is the one performing the action, if there are more members in the responsible area than just one.

The solution would be to clearly define the roles in precise terms and match them with the current existing roles in the case company. It would then clearly define the responsible roles for each step. For the final proposal, roles sales, recruitment and management will be replaced by Sales Manager, Recruitment Specialist and Account Manager, respectively.

The other findings and feedback from the workshop were targeted more towards the actual presentation format of the proposed process for handling intermediary customer requests, some of those can be also implemented to the final proposal in this Thesis document as well.

Finally, the rest of the feedback and findings were more related to sales, business process and items outside of this Thesis, hence those are not covered in the final proposal of the process for handling intermediary customer requests.

6.4 Final Proposal

Findings from the stakeholder workshop requires an update to the responsibility assignment matrix (RACI matrix) with new roles names replacing the old terms sales, recruitment and management. Table 10 describes the new updated RACI matrix

| Process Step | Task | Sales Manager | Recruitment Specialist | Account Manager | Notes |
|--------------|---|---------------|------------------------|-----------------|---|
| 1 | Receive intermediary customer request | R | I | I | Usually the sales splits the responsibility with management, depending of the customer |
| 1 | Create an entry in to the database | R | I | I | |
| 1 | Assign the case to Recruitment | R | C | A | |
| 2 | Analyze requests | I | R | I | |
| 2 | Search for a candidate based on requested profile | I/C | R | I | |
| 2 | Interview candidates | I/C | R | C | |
| 2 | Select matching candidates | I | R | A | |
| 3 | Choose the candidate the be promoted to intermediary customer | C | C | R | |
| 4 | Deliver the candidate profile to the customer for evaluation | R | I | A | |
| 4 | Arrange the possible interviews with customer | R | C | A | |
| 5 | Create agreement material for the case | R | I | A | Unless there is some type of frame agreement already in place, then there is no need for negotiations |
| 5 | Sign the agreement and agree the delivery date | R | I | A | |

Table 10 Updated RACI matrix

The new roles are presented in the RACI matrix, replacing the old terms. This would offer a clearer picture to the users of the RACI matrix, as there may be more than one person working in sales or in recruitment area in the case company.

The final proposal of the handling of the intermediary customer request process is presented in Table 11 below, with new more precise terms used for participating roles, which correspond better to the current existing roles in the case company.

Final Proposal for Intermediary Customer Request Handling Process

| Process steps/ Actions | STEP 1 | STEP 2 | STEP 3 | STEP 4 | STEP 5 |
|---------------------------|--|--|--|--|--|
| Process flow | Customer request received by the case company Assigned to a person to start the processing of the request | Responsible person starts the request analysis; role, duration, competence Based on profile, starts searching for a match | Matching profile found and contacted CV is reviewed and polished to match the customer request If no matching candidates are found, end of process | Selected candidate is presented to the requesting organization If approved, sent to the end customer for interview If not approved, back to step 2 | End Customer approves the candidate -> Contract signed -> End of process End Customer declines the proposed candidate -> Back to Step 2 |
| Roles | Sales Manager, Recruitment Specialist | Recruitment Specialist | Recruitment Specialist, Account Manager | Sales Manager, Account Manager | Sales Manager, Account Manager |
| Responsibilities | Start the activities, record the request | Analysis of the request, search of the candidate | Interviews, decision making: GO/NO GO | Customer Management | Agreements, operational decisions |
| Documentation | Request is logged into process list | Progress is recorded into a follow up document | CV, backlog of candidates | CV, contact data, feedback | Agreement |
| Follow up | Status checks, weekly basis | Status checks, weekly basis | Status checks, weekly basis | Status checks, weekly basis | Status checks, weekly basis |
| Tools | Office tools, emails | Office tools, emails, LinkedIn and similar databases | Office tools, emails | Office tools, emails | Office tools, emails |

Table 11 Final Proposal for Intermediary Customer Request Handling Process

Table 11 presents the final proposal with changes from the key stakeholder workshop, i.e. new updated role names for better indication of responsible roles for performing actions.

6.5 Recommendations

This Thesis recommends the implementation of the final proposal to the case company for improving the current ways of working. However, the scheduling of the implementation work needs to be agreed separately, as it is more of a business decision and outside of the scope of this Thesis.

7 Conclusions

This section summarizes this Thesis and evaluates the success as well by comparing the business problem to the solution this Thesis offers for the case company for handling intermediary customer requests.

7.1 Executive Summary

The objective of this thesis was to address the current ways of working in the case company for handling intermediary customer requests. The current ways of working were considered ineffective and confusing for most of the participants as there was no proper process in place to support the daily work.

The research for this thesis was done by applying the design research method with multiple qualitative data collections, by performing a current state analysis and literature research for applicable business area.

The current state analysis indicated three major improvement areas for the case company; *lack of role and responsibility definitions*, *lack of process flow description* and *lack of documentation*. The literature research indicated some methods to improve the discovered areas. However, the need was to create a simple and easy to understand process to support daily operations.

The proposal for handling intermediary customer requests consists of role and responsibility definition in the form of a RACI matrix, process flow description and all relevant data in written documents.

The RACI matrix provides the levels of responsibilities for each role connected to the process execution of handling intermediary customer requests, informing all relevant stakeholders, what tasks are assigned and who is responsible for performing those activities.

The process flow is described in sufficient details including which roles are connected to the process execution, in which steps the process is executed and what are the outcomes of each step. All this would be then monitored in weekly follow ups for easier management for the relevant accountable roles in each step.

Documentation created as part of the process development offer the case company written guidance and easy reference for the different elements of executing a process for handling intermediary customer requests.

Validation of the proposal was conducted in a workshop with relevant stakeholders, where the proposed process for handling intermediary customer requests was examined in detail, including the responsibility assignment matrix (RACI matrix) to illustrate the roles and responsibilities during the process execution. Based on the feedback, the proposal was addressing the findings from the current state analysis and improves the current ways of working.

The proposed process for handling intermediary customer requests for the case company improves the daily work, it offers more efficient ways of working, and more importantly, it would deliver the basic backbone for any new employee who would be assigned into the management of customer requests. The documentation would offer the easy reference for the case company roles participating in the process execution.

7.2 Next Steps and Recommendations

The final proposal for the intermediary customer request handling process is very useful for the case company, it offers clarification of roles, responsibilities and it provides clear documentation for users to support their daily operations while working with intermediary customer requests.

The first step to implement the process would be to negotiate with the company management to make the decision to implement the process of handling intermediary customer requests into the daily operations of the case company. The author of this Thesis would estimate that after a few months of running the process, it would already benefit the company by clearing the uncertainty aspects of roles and responsibilities and offer written documentation, to support the daily operations and to speed up the processing times of intermediary customer request.

The second step would to obtain the support from management and address the change management needs for implementing the process model into practice. However, the current state analysis already indicated strong support from the management to implement

the final proposal into use in the case company. The actual implementation project falls outside of the scope of this Thesis; however, the author of this Thesis would be grateful to offer all the needed support.

The third step would be to offer training for the relevant roles of the process, namely who would be doing what and when, according to the process flow explained in Table 10 and based on the RACI matrix, explained in Table 9. After the trainings, everybody involved should have clear understanding of how to operate under the new process.

The fourth step would be to agree and set up weekly follow up meetings and assign each active case to a responsible person, in order to be able to track the progress of each intermediary customer request already in progress and agree on the first new case, which would be processed according to the new process.

The fifth and final step would be to organize a review session after a predetermined period of time to evaluate the current process and to see how well it is utilized in the case company and if there are any updates required, identify those, and set up the plan how to implement the agreed improvements to the process.

7.3 Thesis Evaluation

The objective of this Thesis was to develop an appropriate process to handle intermediary customer requests for the small case company operating in consultancy business. Based on the findings from current state analysis, the improvement areas were; *lack of clear roles and responsibilities, lack of proper process flow description and general lack of documentation.*

This Thesis provides a solution in the form of a process proposal for the case company to address those findings, by presenting a simple yet effective process flow description, responsibility matrix with suggestions how to divide the responsibilities to several roles and offering documentation to support the roles in their daily work.

The evaluation of this Thesis, from the four categories of validity, reliability, logic and relevance of search, is discussed below.

Validity and Reliability in qualitative study was defined to be the relevance of the credibility of the data acquired during the research phase of this Thesis. As the selected method included multiple qualitative data collections in the form of current state analysis with multiple stakeholders from the case company, as well as literature research for the relevant areas.

One can argue that the data provided by the stakeholders was raw, the data was acquired directly from the participants by asking open ended questions, and the data was recorded into files by recording software. The data was later extracted into written format, see appendices 1-6, word by word, with no interpretation or opinions provided by the author.

The authenticity of the data was secured by engaging all relevant stakeholders of the case company, all relevant opinions were collected during DATA 1 and 2 phase of this Thesis. However, one area of improvement would be the different levels of engagement of the stakeholders of the case company. Not all participants were available for extended periods of time to provide material, food for thoughts for this Thesis, which may have led to certain development actions from a fewer points of view along the development process. Should one change one thing from the data collection part, there perhaps should have been more thought put into making sure all relevant parties would had had the same amount of influence over the topic.

To address the logic of this Thesis, one can argue that the weakness areas from the current state analysis were presented in a clear fashion, all relevant findings were analyzed, and addressed in the proposal phase of this Thesis, and all findings from DATA 3 were commented on in the validation phase of this Thesis.

In retrospect, one area for improvement would be in the framework part of this Thesis, as the initial reaction was to research for the latest and most famous methods to improve business processes in the top companies of the world, there was plenty of material available. However, the realization of the case company's need for more basic approach, changed the approach into more basic level materials, which perhaps should have been noticed at much earlier stage of the development process of this Thesis.

7.4 Closing Words

This proposal is aimed at a relatively new company, which hasn't had the time to learn and adjust the individual people's ways of working into a company working culture that would require time and effort from all participants. However, this proposal can offer the basic building blocks for the case company to start the learning process. The future will hopefully offer new opportunities to fine-tune or introduce new, more complex and intricate solutions to help the case company to become even more sophisticated in handling the customer requests.

It has been an interesting learning experience to investigate and propose something new, something which has an immediate effect to real life ways of working for a small, yet enthusiastic group of people, who have been very supportive throughout the process of writing this Thesis. I am humbled by the attention this work has gathered during the process of writing this Thesis, for which I am ever grateful.

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Appendices

Current State Analysis Interview of ISO1

Question 1: How would you describe the current ways of working regarding the customer request handling?

So, basically its either myself (ISO1) or ISO2 or then somebody sending an email to the team, to everybody saying that we have this request and then we will look into the people we have in our database to see if we have a match and if we do, we will send that profile to the customer.

Of course, in between, we need to speak to the person to see if they are still available or not or what is the status. And so on.

Also, usually we are asking more details from the customer, because not necessary everything is, you know, is in the first email. So, we need to know the length of the assignment, also if they accept contractors, if they are flexible in any way with anything that is in the job spec and so on. So, we need to clarify a bit of that. Basically, first step is that. We go back and ask if we have any questions if the request is not clear.

Second step will be to check our databases to see if we have somebody matching the profiles or profile matching the request. Then if we have them, we send it across. If not, then we anyway inform the team and then everybody can search to see if we have somebody available matching this one or we search for a new person based on the job specs.

And then when we search for a new person, then we look different, basically from different applications, online applications from LinkedIn, Monster and so on or whatever we find a new person, Facebook.

Question, can you describe that what is the usual length of this process, how long it usually takes?

Usually we need to react very fast, I mean it should not take longer than one or two days. Because usually the positions are not any more available. Of course, there might be

some niche ones, those can be available. If it takes longer than two days, we are too late.

Question 2: How would you describe the current roles involved in the handling of the aforementioned requests? Who are the people involved and what do they do?

Basically, me (ISO1) and ISO2, we are receiving the requests. In most of the cases, for example, ISO2 does the process from the beginning till the end. He is also correcting the request, searching for the person, identifying, interviewing, sending the profile to the client follow up, and then even close the deal if the person is selected and gets the contract.

So, the roles, how is see it, in the ideal way of working, I think we should have some people specialized in that, meaning that in the handling the request and then the people recruiting and then somebody handling the contractual part. But course, we are a small company then, this one can be done, can be split, we can split the responsibilities. Now with ISO5 coming, the idea is that she will take care of, let's say, new request, helping us identifying the new possible clients and new resources. And me (ISO1) and ISO2 will concentrate on maintaining the current clients and try to help in different areas but not necessary doing end to end anymore.

Question 3: What kinds of tools are used in recording and processing the requests?

We don't have fancy tools, we don't have a CRM or this kind of stuff, we are using excel and word documents and then we are storing them in some shared drives, we are sharing them with everybody, then emails and LinkedIn accounts.

Question 4: How is the progress followed up? By Whom?

Usually the person that has started the discussion with the customer, is following up it until the end. I mean if it is the closed deal or is not. I mean if will start a discussion about, about with somebody, about a position, and I am sharing some profiles with, for example, with customer X and I am following that until the end. I am responsible for following up with the customer, also with the person (=candidate), for which profiles I shared, keeping them updated. So, I will be the one doing that.

But in some cases, we might also share that, basically, I get the requirement and share it with the team and then maybe Bogdan can take over, if it is related for example to project management and I don't have that much experience in that area. So, depending also on the request. If it is testing related, test automation, so I am trying to do that myself, if it is project management related and so on, then some cases go to Bogdan.

Question 5: In your opinion, what type of positive aspect there exists in the current ways of working?

I think communications works well, we are communicating very, very, often, and then we are trying to be aligned on everything we do, so I think that one is working well.

Question 6: In your opinion, what types of improvements are needed and why?

For the improvements, what we need, I think we need to, I will say that, a bit more structured in this sales stuff, and maybe improve the communications towards customer, maybe marketing, image, so this kind of stuff we need to be improved.

But for the process, I think the communications, and the alignment, we know each of us we do, and the flexibility, we are very flexible in what everybody does, we don't have, let's say, written in stone, what everybody should do, so it is a flexible process. That one is working well.

Question 7: What kind of customer feedback there has been regarding the ways of working?

Well, actually, we are in the process of requesting, that one, I am requesting that from customers A, B and C, I think they are very happy, what is let's say good in our side is that, we are reacting quite fast, I mean probably comparing with other bigger companies, where they don't necessary rely on one particular job, for us, everything is important. It doesn't matter how small it is, it is important, we are trying to react to that, if we have something we know we can help with we are reacting and getting back to the customer immediately. And then I think that is something we are good at. The feedback is being positive, verbally, nothing in written, but we are trying to get now also statements to be published on our website, that one will give more insight, but like I said, we have good

relation with our customer, with current customers, and I think, like I said, our main stuff is that we are reacting fast and then we are in continuous touch, you know, continuous communications with the customers, so they know what we do and we know what they do.

Question, has there been any kind of critical/improvement ideas coming from the customer's perspective, from the customers side?

Actually not, we didn't receive anything that they would see differently that we do it. I think we also learned during, let's say last year how to handle the customers and how to basically to answer to their needs, so. No, we didn't receive any negative or suggestions for improvements from their side.

Any other observations regarding our communications, or the process of how we handle the customer requests?

I think what we need is, we need to organize a bit now that Salla came and so on and to start organizing a bit the tasks so basically define a bit more robust process, because like I said, the currently the process is not something that is written, it is something we know, it is something we will follow and we are way flexible on what everybody does, right? But I think it will be interesting, you know, to define those ones a bit better and try to have the people do a bit more let's say, to work in a bit more standardized way.

Current State Analysis Interview of ISO2

Question 1: How would you describe the current ways of working regarding the customer request handling?

Ahm, ok, so, like what you said, we have a number of customers, from where we get intermediary, so called intermediary requests for jobs, they are coming in a terms of resource requests for specific projects, the end customer have, or in some cases the intermediary customers are having their own products and are assembling a larger team and then delivering it in a project or as an product to the end customer. So, this could be also two cases, within this intermediary process. So far we have been mainly working with, ahm, with process based, resource by resource based, getting resource requests for specific roles, ahm, recently as you know, especially with this Solita case, it's one customer creating a team, to build a product to the end customer.

So maybe we should be focusing on the request based requests, for a specific request need, as we have been working so far, for example with Experis. We, at first, of course, we have an established relation, with the customer as you know, and in order to build this relation you will also need to have a contract, it's about the same situation as with the direct end customer, we have our own intermediate contract, let's say with let's say with between IsoSkills and Experis, usually this type of contract they are done, they are kind of mirrored, between what Experis is having with KONE, and then created in a kind of mirror effect contract with us, although they might introduce some particular Experis terms inside.

They, at the moment, some of the companies are creating a frame agreement, so they are open to have a frame agreement between companies, and determine frame agreement and based on that frame agreement they are creating work orders. With Experis, they only have work orders and some aspects of related to what could be in a frame agreement; they are introduced in the specific work order. And usually Experis is creating one work order per resource. The usual request we get, in this intermediate model, so far, they are resource based, and based on the customer resource request.

In order to get, to handle this type of request, of course, as a company, you need to have some defined roles, and responsibilities inside, and we have this so called account manager, although that it is not very, very, official at the moment we are, some of us, mainly as you know, me and Dan we are the account managers for specific customers, for some long time, I have been managing those more or less, but then as work effort has grown, so Dan has also started to take from them, so kind of defining an account manager that has besides taken care of the account manager, it also takes care of the, not only the job requests but the whole relation with the customer, with the intermediary customer eventually the end customer as well if it is needed.

The account manager will regularly ask for jobs also from the intermediate sometimes, especially if we don't get jobs for some time, you will need to ask the partner from the intermediary company about any new jobs, it might be cases they are thinking of sourcing them internally, they might have some requests and they are not sending necessarily all the requests to us, and then it is good that we remind them from time to time about us, about the consultants we have, especially if we have some good consultants at the moment, in the roles they we know that they are usually sourcing, then we try to promote our consultants.

So getting the job requests, promoting our own services and our consultants periodically are part of the responsibilities of an account manager, and also having the relationship, close relationship with the customer, intermediary customer, is also part of the responsibility.

Question, what would be the next steps, once we have received the request from the intermediary customer?

Right, so once we get the clear requests, and you know, we have also in the beginning we have established let's say some channels, of getting these requests, so we have been establishing these channels, so the main channels are the emails, at the moment the channel is the email channel, to different specified addresses, that are agreed in the beginning, in general these intermediate suppliers are working with other suppliers and they have clear channel, used for the request delivery, and the, in some other cases, sometimes they just call for example, especially when they are hiring some roles and not having too many details or knowing that we might have a candidate, so then they might

be skipping this official channel of emailing and just calling the account manager from our side and asking for a specific role.

So, the first step, let's say is an email of request coming to us, we have been encouraging all the time that this is coming officially through the email, we have been talking and they are already sending, as you know, the request in specific format, as many details as we get is good because we really need to have a clear understanding of the role, in both technical and soft skills, of the candidate that we should be providing. Clear job description, and the, of the name and of course as much details as possible of the responsibilities inside.

There are different aspects to be introduced there, in addition to the technical and soft skills, and would be good to have also contract duration, the location of the job, and the of course the starting time, all of those you have to have better understanding what is inside, to also give you some information about the position, you can offer to the candidate, the contract, if you can make it permanent, or temporary contract, and eventually the rate that you get for that type of role, to have an idea depending also on the candidate level to know how to fit the proper candidate or to negotiate back to candidate in that case.

So, once you get this good understanding of the request, sometimes it might not be working through one email, it could be that they don't have, although they have a good template already established during the years, it could be sometimes that some details would be missing, or more requests for information are required, so in that case we are answering an email and providing, requesting to provide little more information, that we know that we need in that particular case, or even call and try to clarify that information by call.

Once we have these things clear, the next step will be for the account manager to make this, of course the account manager can already provide some kind of feedback to the, to his counterpart so to say, in the intermediate company, about the possibilities we have, eventually he knows what kind of candidates we have available already, and giving some intermediary feedback, or information about what we can provide, to them and eventually when we can provide, and when we are sending the first candidate, for that would be the next step from our side.

The next step internally, for the account manager, to share the role and the information he has, internally with all the necessary people having a need to know and working for example in recruitment and sales, internally, to get this role acknowledged.

Another step at the same time is to introduce the job in the, in our database, in our job database, and so everybody can see that clearly, that we have all details on files, and we can consult that anytime, to not necessary to look in emails, it is in one place, it is easy to access.

Once the job is promoted internally, there might be some directions, there might be some ideas, there might be some hints, general ones or some more specific people that, the account manager knows, that they might be having, or some ready contacts, for example, the recruitment collaborators, as we have now, ISO3, ISO4, ISO5, they might be having some candidates, and there might be some information, some additional information to be presented, in that regard for selection of candidate, or eventually the account manager has been already knowing about what we are having in the database, he could be even asking some profiles, some profiles that he knows might be good the be presented to the candidates.

So the first thing would be somehow for the account manager and also for the people after the internal recruiters, let's say, after they got the information, it would be searching through the database. And then to start to identify in to the database, the right candidate, available to work with us or the candidate that has been contacted and but hasn't necessarily answered yet with his availability to work with us. Or interest to work with us. And then we need to emphasis that and then with the main candidate selected, the persons or let's say the recruiters who are owners of that specific candidate, so those who have been identifying and being in touch with the candidate, to clarify the situation of the candidate.

They will go to the candidate, either by calling or sending an email, depending on how fast we need to speed up, in some cases or depending on the situation of the relation with the candidate or eventually what has been discussed previously with the account manager, what is the best way to contact the candidate and they will be contacted and they will be made aware of our job, or our role, and trying to get their interest, trying to

get their interested with the role, trying to discuss and to see if they fit the role if they consider the role, and getting a feedback from the candidate about the role and their interest with the role.

So, in some cases there might be some up to date template, CV to be delivered also, eventually refreshed by the candidate, or tuned by the candidate, also to be polished and to be fitting to the job. Or making sure somehow, trying to increase the chances to be promoted, as you know, many cases the selection needs to be prepared properly. They are looking for some key words, without going through the whole expertise of the candidate and we just try to make it somehow more visible, to be more attractive, to whom we send it. And that comes somehow with experience, it is done more based on experience of the people working with that process.

Ok, so once we have the interest and we have the candidate, we have the candidate interested in to have a discussion with the intermediate company, we are revising it internally, so we do a step to revise internally what we've got for the consultant, so the account manager will need to verify with the recruitment what is the latest state of interest and put on the list of candidates to be sent for that account, or otherwise deciding of not selecting for some particular clear and dedicating reason, of not been selecting. We might know some specific customer request, in that case, for some reason that candidate might not fit. And we really like to send the best candidates to the customers. Even they could be a good fit, we try to select the best to the customer and try to have our chances increased.

So, a short list, let's say, is created with candidates we have and the account manager might be working with different people, different recruiters in that regard, to create the short list, getting information and... so getting the profiles from different recruiters in that case and assembling the list usually putting it on an email and assembling the list of profiles, when we send the profile to the customer, usually we create a short profile, so the account manager also needs to create that kind of small profile, a short summary and polish it a bit, and create it as a profile, we have noticed it is much easier for the people we send it to, to go through the profile and to have a clear understanding of it, they will get more understanding once opening the CV. But the list will give a quick summary, an understanding of what we sent to them.

So, account manager will get this kind of list of one or two or three profiles, if we can, that we consider that we consider are good options, try to put them in right order, so that the most, the ones fitting most to the position would be the front positions, and once all this process is finished, the list is clarified, eventually it is discussed internally with some other people for example with you, Sales Director, with some other managing partner, eventually that has also, maybe can provide some advice or things like that, discuss internally, having one final internal review on management level, then the profiles are sent to customer, to intermediary company

Now, there is also to consider the timing, so usually we noticed that if you like to have good chances, to get your candidates through, it is good that you assemble and send the profiles in about a week. Everything more than a week it could be that the intermediary company has already received some candidates or identified internally or received from some other companies, it looks like in Finland that somehow it is some kind of cultural thing that first one is served.

If you are a good candidate and if you are one of the first, they can take the first good ones without considering later on too much, even if you... I think there have been cases that we provided good candidates, but they did not consider since some candidates have been already sent. And only you get the chance to, you could get a second chance if the end customer it's somehow not taking on the first candidate. Here is a lot also; also there might be differences if you work for direct customer, than intermediary, so it could be a little bit more flexibility, if you work with direct customer, and you centralize the contacts, you can still promote and influence the customer little bit more of your candidate.

This is another let's say issue we can clarify, how to improve, how to promote and get our profiles through the intermediary companies somehow, how to ensure that we provide good candidates maybe better than they got from some other companies and select our company in the detriment of some other, that they get some other company, sometimes that takes time, sometimes it requires discussion with the intermediary counterparts and this is what we wanted to promote, it was part of our improvement in our delivery.

We asked, for example our counterparts to have regular meetings, regular discussions sometimes formal, sometimes informal, so we wanted to understand a little bit more on their side; how do they do selection both technical and soft skills perspective and also,

maybe also to build trust, tell them a little bit more of us, about our consultants, so trying to be in their eyes a bit more trustful partner. Building the relation, building the trust, these are the two things we do to get a little bit more visibility and to increase the chances also to try to understand the customer better. And to be able to send them better candidates.

So, once we have sent the profiles, we also need internally also to be organized, keep track also to everyone involved in the process, that these details are up to date, in the job profiles, for example, adding the names of the consultants we have entered into our database for further use.

Current State Analysis Interview of ISO 3**Question 1: How would you describe the current ways of working regarding the intermediary customer requests?**

Currently when thinking about the IsoSkills Company, we are doing things in chaotic way. One point is that there is no prioritization, no deadlines known, not enough details, also, I think we should keep things in one place. Now we get them (requests, editor's note) in emails, in SMS, in excels, it makes it you know, difficult.

We have some kind of process in place, sure, and it works, sort of, but it is chaotic.

Question 2: How would you describe the current roles involved in the handling of the aforementioned requests?

I would say that the roles are unclear; they have not been properly defined.

Question 3: What kinds of tools are used in recording and processing the requests?

We use excels, emails, SMS; for communications, but those are not for recording. We also use the Google G-drive for document storing.

Question 4: How is the progress followed up? By Whom?

I would say, on weekly basis for new requests, old requests are not followed up properly. Neither is the new resource cases followed up. Bogdan is most often the person checking the status.

I think the roles are unclear, as stated earlier.

There should be more details marked in the follow up excel about the candidates offered to the customers, what is the current status vs previous week.

Question 5: In your opinion, what type of positive aspect there exists in the current ways of working?

We have good network, we have lots of enthusiasm and talent to get the job done. Lots of good experience from this general business area, we have good potential to get this thing working.

Question 6: In your opinion, what types of improvements are needed and why?

We are currently finding jobs first and candidates later, whereas in my opinion we should sell our existing candidates to customers first.

We could try to create virtual teams, based on our own network of people, to walk through CVs, how to improve, what to write on them, so that the profile would be easier to sell to the customer. We can create different teams based on the experience, test manager team, project manager team.

We don't have dedicated teams on focusing different business areas. But if we could get more people joining forces, maybe we can provide better ideas as a result of the cooperation.

We talk to people, try to get them interested in us, but then we do not continue keeping in touch with the candidates.

We need to establish better control of how we offer candidates, into which companies and tell them not to apply directly to the potential customer case. We need to invite them to our office, get their commitment to us, to build the trust between the company and the potential candidates.

We need to have some easy quick guide or similar to tell the customer who we are, what is IsoSkills, so that the story would be consistent from everybody.

Question 7: What kind of customer feedback there has been regarding the ways of working?

Not yet so far.

Current State Analysis Interview of ISO 4**Question 1: How would you describe the current ways of working regarding the intermediary customer requests?**

So, currently it happens so that IsoSkills will receive these requests from different customers, from somewhere, but I don't know how, but I will receive requests for various roles and positions, and the details vary a lot from time to time. Basically I can receive an SMS with a request for technical service manager. In some cases I will receive an email with more details describing the request or it can be just PM (=Project Manager, editor' note) for logistics. That's it.

After that, I will find that kinds of profile from LinkedIn, and make a connection to the person and usually they will replay quickly, if they are interested in the proposal. Then I will usually have a short meeting with them, but I have currently a principle of not interviewing them over the phone, because I am not able to tell them much about the company or about the customer or the project. I can't really say much to them. But it depends of the situation a lot.

But if I am happy with the discussion I have had, and the people are happy to continue the discussion, they aren't always, but usually they are, then I will send their CVs to Bogdan with the schedule when they are available for phone interview with him and their phone number.

And then at some point I will update these details to the excel we have. It varies a lot, as sometimes there are so urgent cases coming that the excel gets update when it gets updated, if it gets updated. But the important part is that I will get Bogdan to call the candidate. I must be able to sell the candidate the Bogdan. In some cases I will call Bogdan and say this and this person is really good and has great profile, with good experience, likeable personality and is really good candidate for the case. Bogdan will then call them and after that he may call me and agree that this candidate was very good.

Sometimes it may happen, when we have very urgent case ongoing and suddenly, I can find something like five candidates simultaneously, I can then send them to Bogdan for

preselection, to screen the best options, so that he can point out which of these candidates he would like to see and interview. And then he lets me know, that this one, this one and that one. Or just this candidate. Then if it goes so that Bogdan will do some stuff I am not aware of, I don't know anything.

Question: How much visibility do you have for the case after you have provided candidates for ISO2 to process?

I don't have any visibility, I mean, there was a case where we needed a test manager in Tampere, and I found one, but actually, it wasn't supposed to be a test manager but rather some software testers in Tampere, so I go look for them. Then the case goes forwards, but I don't know if those candidates are ok or not, but most of the time they are not ok.

Question 2: How would you describe the current roles involved in the handling of the aforementioned requests?

Roles, yes, I don't really know, what roles are involved currently, I just had a discussion with one person, where I described my role as a positive bouncer guiding people in. I am trying to get people involved and interested in our company but I don't make any decisions, regarding anything, and Bogdan, Dan or customer does something.

Question 3: What kinds of tools are used in recording and processing the requests?

We are using the excel file, it has been edited a lot, but hopefully it is now up to date of what kind of data we need to fulfill, in the top row. Then, I use a lot of LinkedIn, well mostly that and then in some more rare case, email as well. Basically, mostly just LinkedIn, including the messaging tool within the LinkedIn.

Question 4: How is the progress followed up? By Whom?

In my opinion, it is not followed up at all, we were just walking through candidates and I assume that somebody will pick up the suitable ones for presentation to customers, but I don't know if it is followed up. Maybe more on those who are promoted to the customer?

We don't necessary keep in touch with the candidates at all after the initial contact. I don't know... I mean, I do check the excel list from time to time, as I have lots of people in my LinkedIn network which I never added to the excel list of candidates.

Question 5: In your opinion, what type of positive aspect there exists in the current ways of working?

Well, I like the area I am working on, I like the fast type nature of the business, to quickly get somebody with impossible time limit to the case. I can make the first contact easily, most of the time, with some exceptions, but most of the time it goes well. And Bogdan buys the case and starts processing it further.

Question 6: In your opinion, what types of improvements are needed and why?

Sometimes I feel like there is some massive disparity in some of the actions we take, I mean, sometimes we have really unclear ideas of who, what and why to sell to our customers, for instance in replying to job ads and in clear cases when the customer is looking for consultants instead of recruiting internal people for the roles.

I mean, what is the strategy of the company, or our sales targets? Who are our ideal customers, targets we want to acquire?

We need aggressive attitude towards the customers and not to use excel based sales tactics. To put the pressure, I mean when you reach the targets or not?

I think now when we have a recruitment trainee, we should probably get a sales trainee as well, to have more focus on the sales activities. I it also more of will and attitude question, we have to does things we want to do.

I also I feel that when I am communicating with the candidates, I feel like I should be able to tell more about our company as well, the current material isn't that supportive.

What we can also try out is some kind of collective networking and sparring and supporting role for the company, there are lots of good professionals looking for work, which for various reasons they have not been able to secure so far, like old Nokia employees, we

could formulate some kind of peer networks and support them in their search for their next assignments. We could be able to search suitable candidates for our own use as well?

I mean, if we are able to help them, they could feel some kind of compassion for our cause as well.

We should network more and take our candidates and sell them to customers!

Question 7: What kind of customer feedback there has been regarding the ways of working?

No, there is no visibility, I have not seen any feedback regarding the ways of working.

Current State Analysis Interview of ISO 5**Question 1: How would you describe the current ways of working regarding the intermediary customer requests?**

Scattered, hard, sometimes the customers include very little information to the request. They will send it to one source, which is our office email address and where from it is potentially forwarded and filtered, I mean the information available is very little.

We don't have a proper internal process on who has what kind of responsibility and who knows what kind of candidates and who is responsible for contacting the candidates who we have in our pool and are interested in working with us. So now when the request comes, we share the little information we have and then everybody will start running around in every direction.

Question 2: How would you describe the current roles involved in the handling of the aforementioned requests?

All of us ladies are doing the recruitment, and some sales on the side, so we do the running around and getting information and getting the business running, finding the candidates. When the case goes forward, the same person takes responsibility for introducing the candidate and having the phone interview or interview with the person, and then they choose the final candidate to be presented to the customer.

Question 3: What kinds of tools are used in recording and processing the requests?

For information sharing we use email and excel, where we collect our candidates and new requests, LinkedIn to search for suitable candidates to match the requests. Ideally I would like to have some kind of CRM tool to save the customer account related information.

Question 4: How is the progress followed up? By Whom?

There is no clear way how we do it, there is the weekly meeting, where we check the open cases, and it is done in various ways, not in a structured manner.

Question 5: In your opinion, what type of positive aspect there exists in the current ways of working?

We have very good and experienced people pushing the business forward.

Question 6: In your opinion, what types of improvements are needed and why?

We don't always do very thorough follow up on candidates; we don't keep them in the loop. We should investigate what kind of "looks" the customer is interested in getting, I mean, can we offer the candidates who are on paper exactly what the customer wants, but there are sometimes additional requirements, which we may not be aware of.

We could also try to teach candidates to be more appealing in front of the customer, to teach them to be more consultancy types, so that the customer would get more interested them when they are interviewed.

We could do some kinds of video sessions, to illustrate how you should act in the interview moments, so that we could offer training and to improve the chances of getting approved.

We should take the time to analyze the failed candidate cases, to investigate more in details, why he or she was not accepted, what were the reasons, so that we can improve for the future.

Question 7: What kind of customer feedback there has been regarding the ways of working?

Use the social channels more, make them more personal, add user stories, blogs, articles, anything to make the website and other channels more personal. The current status doesn't necessary reflect the identity of the company any way. There are no pictures, for example.

Feedback of Proposed Process Model**What are your comments regarding the Process Model?**

“I like to simplicity of the proposal; it seems to have all relevant findings addressed” ISO1

“Good work, this should help to clarify the current situation, by offering clearer role and responsibility table” ISO3

“Can you provide a flow chart of the process model as well, in a power point format for quick reference?” ISO5

What improvements do you think it needs?

“I think we should consider the roles a bit more, I think some actual role names should be added, instead of just calling them sales, recruitment and management” ISO2

“Can we discuss in the next phase more about the actual tools we should be using as well as some scheduling when we can take those into use?” ISO5

“Is there need for creating similar process for the other cases, i.e. when we have the direct customer requests, instead of intermediary customers?” ISO3

“We still need to consider the sales part of the process itself, this address just the middle part of the business aspect, i.e. when we receive the requests, however it doesn't focus the sales actions required to get those cases” ISO3

“Build a more color-coded version of the process flow” ISO5

What are your recommendations for next steps?

“Let's consider implementing some aspects of this before summer holiday period starts, if the current schedule of the relevant people permits” ISO1