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IMPROVING THE SERVICE DELIVERY OF A DEPARTMENT THROUGH PHYSICAL ROLE CO- LOCATION RESTRUCTURING: AN ACTION RESEARCH APPROACH

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A full-dissertation submitted to the University of Cape Town in fulfilment of the requirements for the
Degree of Master of Industrial Administration

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ACKNOWLEDGEMENTS

I would like to extend my sincere thanks to the following people who assisted me in the completion of this dissertation:

- To my supervisor, Corrinne Shaw of the University of Cape Town, my sincere thanks to you for your ongoing guidance, advice and support and patience throughout the SLDP program and during the completion of my dissertation.
- To my colleagues, and in particular Douglas, Hans, Ian and Pauline, thank you for your undying support and commitment through the implementation of the restructuring process, you gave me the freedom to put into practice my ideas and learnings from the SLDP program by way of physical change implementation in the workplace, and for this I am extremely grateful. Thank you for giving me the scope to restructure the scheduling department as I saw fit to do.
- To my staff in the scheduling department, thank you for participating in the qualitative research process, for your valuable input and unwavering support during completion of this paper, what a great team!
- To my wonderful wife Nicole, thank you for supporting me throughout the duration of my studies by sacrificing valuable family time over weekends and during evenings and holidays so that I could pursue my dreams. It has been a long and hard journey for us, I love you!
- To my parents, thank you for instilling good values and strong discipline in me as I was growing up, without which I would not have completed my studies or have been able to drive my success.

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ABSTRACT

The Underlying Problem

The management team (hereafter referred to as 'management') of a leading international oil company identified significant problems within the transport scheduling department operation, extending from concerns related to fragmented roles, the physical location of roles and management isolation, to fragmented department processes and procedures. The resulting poor communication further exacerbated the department's inability to provide an effective service to both internal and external customers. Based on this, management decided to act and embark on an extensive restructuring process in an attempt to improve overall service delivery and ensure department sustainability into the future. This action then paved the way for an extensive restructuring process focussing on changes based on role co-location changes. This process began with the appointment of a new scheduling manager to head up the department and to design and oversee the project plan for restructuring. It was obvious to management that, if action was not taken soon, the department would continue to degrade, thus forcing management to decentralise the transport scheduling function within the company that would result in the disbanding of the department.

In Part 1 the description of the problem is defined, beginning with a detailed account of the scheduling department restructure, thereby clearly defining the case study as a research topic. The restructuring account describes inter-role communication, co-location changes through cluster team implementation and the communication changes that were made with customers. It outlines how quality assurance and technological advancements were introduced during the restructuring process in an attempt to improve service delivery, together with the improvement of quality of department outputs that define the level of service to customers. After defining the research topic, the problem situation that must be addressed through this study is delineated. The problem situation defined in this study addresses two main areas of concern. Firstly, whether it is possible to achieve an improvement in service delivery of a department through physical role co-location changes. Secondly, whether it is possible to effect such changes without disrupting the motivation and performance levels of the staff necessary to ensure department sustainability into the future. It is hypothesised that restructuring success and staff motivation and performance are inseparable in ensuring the future of the scheduling department, because they are unified enablers for sustainability. The disruption caused by the restructuring process could have a negative impact on staff motivation and performance levels, without which improved service outputs by the department would not necessarily be achieved. Therefore, focusing on both of these factors throughout this research process is very important in order to satisfactorily address the research question and concern that has been raised.

The description of the department restructure as a case study for research thus highlights a 'problem situation'. A concern is raised that requires urgent research: If improvements in the service delivery

of the department have not been realised through the physical role co-location restructure, and, if staff motivation and performance levels have not been maintained during the restructuring process, then the restructure project will have been a costly waste of time, threatening the future sustainability of the department. This concern, therefore, defines the research question that must be answered by this research process, namely that of the level of service improvement and the 'recipe' for maintaining staff motivation and performance levels. The answer to this question will be achieved by determining both the level of success of the role co-location restructure against pre-defined service improvement indicators, and the management approach required to ensure sustained levels of staff motivation and performance through the restructuring change process of the scheduling department. In order to complete this investigation, the researcher embarks on a rigorous methodological research process that adopts the main stages of the action research cycle.

Research methodology

Part II defines the research approach taken by the researcher and his understanding of the research journey undertaken. The researcher defines two metaphors to describe the research journey, namely that of the cycle "cone" of on-going learning and the research hexagon. Learning begins with the departmental restructuring. The second cycle of research determines the level of service delivery improvement by defining the level of success of the restructure and the requirements for maintaining staff motivation and performance both during and after the restructuring process. Each cycle of research commences where the previous one has left off and each cycle defines an increased level of learning that allows the researcher to progress to the next research cycle. The high level definition of the research methodology framework is derived from the key stages of action research. These stages govern the research methodology model – goals and assumptions are made based on the department restructure, data is gathered for evaluation making use of the various data gathering techniques, restructure success is determined and a hypothesis of restructure is born from the evaluation, thereby defining options for action. The actions defined through this study lead into the third cycle that defines the direction of continued research beyond this study. The research hexagon is a description of the action research cycle defining a six-phase approach in addressing the problem situation that has been defined. Through each phase of the action research cycle reference is made to the original research question as defined by the problem situation, in order to answer the fundamental question posed. Furthermore, social research methods are described in this section and form the basis for the methodology applied by the researcher in order to accurately analyse and interpret the data gathered through the interview process undertaken. Therefore, the researcher carried out social research in order to satisfactorily address the research question posed.

Inquiry Framework

Part III defines the inquiry framework by describing the tools used by the researcher to gather the data required for analysis in order to address the research question. In order to enrich the research evaluation process, the researcher focused on both qualitative and quantitative data retrieval

methods in determining the level of service delivery improvements and the motivation-performance cycle. The methods used by the researcher to gather critical data were the structured interview, the ordinal survey, graphed data analysis, participant observation and critical incident and critical learning logs.

Literature Review

In Part IV the researcher reviews the literature in order to place the research into perspective as a research topic by reviewing what accredited scholars and researchers have published on the topics of co-location restructuring for improved service delivery and staff motivation and performance during change. The literature review begins by exploring what has been written about physical co-location restructuring, and organisational change for the purpose of improving performance and how this relates to the scheduling department co-location restructure process. The review then focuses on the benefits associated with the implementation of the manufacturing proximity model in industry, posed by the manufacturing cell concept, comparative to the co-location implementation carried out in the scheduling department. The researcher next reviews the literature associated with staff motivation and performance; the relationship between motivation and performance of teams and the effects that motivation and performance have on the outputs of teams during change.

On the topic of co-location of roles for service improvement, the researcher found the literature of other authors focused predominantly on the manufacturing sector and at an organisational level rather than at a departmental level as in the case of the scheduling department. Through the literature review the researcher was able to identify the advantages and disadvantages of co-location changes, multi-functional teams and organisational change for improved performance and relate them to the scheduling department restructure and research findings. Furthermore, the comparative analysis of the literature on the subject of the manufacturing cell concept was compared to the scheduling department restructure and similarities and benefits of this model, compared. The application of the manufacturing cell concept proximity model is specialised in the sense that it is a model designed to enhance and improve the performance and productivity of a production line in an industry setting. A comparable application of the proximity model in a non-production environment, as in the case of this study, is interesting and unique. The merits and benefits derived from the application of the manufacturing cell concept proximity model in industry are numerous and are impressive in terms of the documented successes achieved in a production setting. The success of the model is fundamentally seated in the model's ability both to improve the interaction between, and to derive efficiencies from, the workstations or product parts assembly elements found in industry. The interaction and efficiencies focus of the model can be directly linked to the communication interaction between staff roles in a non-production, or service, setting, as in the case of the scheduling department being researched. Hence the model becomes an attractive basis for comparison with the restructure of a department with poor service delivery, as a result of segmented role interaction and poor communication/interactions and outputs.

The literature review concludes with an enquiry into the publications by accredited scholars and researchers on the subject of staff motivation and performance and, in particular, on what drives people to perform, as well as how organisational change impacts motivation and performance levels.

Application

In Part V the researcher uses various data gathering techniques to gather data for analysis the result of which addresses the research question posed. In this section, the researcher begins by defining the service improvement indicators that will define the level of restructure success. The various data gathering techniques are then decided upon and aligned to each service improvement indicator. By defining this alignment, the researcher is then able to determine the interview questions, ordinal survey statements, graphed data to be gathered and participant observation focus areas that would best support each indicator and, thus, provide the richest outcomes from which accurate conclusions can be drawn.

The structured interviews were conducted with the staff within the scheduling department in order to gain their perspective of the success of the restructure in improving the overall service delivery of the department. The ordinal survey was conducted with the field sales force (company sales representatives) so as to gain an external, or customer, perspective of the level of service improvement. Thus, by obtaining both an internal and external perspective of the restructure success, the research process was enhanced. During the structured interviews, interviewees were asked both to respond verbally to the questions and also to rate their answers against an ordinal scale. This dual process enhanced the interview procedure because both transcript and graphed results were obtained. Furthermore, graphed key performance indicators or KPI data, gathered from the department, enhanced the research process by providing a foundation for the formulation of the hypothesis of restructure that provides a 'recipe' for managers embarking on restructuring or a change process, and defines the relationship between staff motivation and staff performance through explanation of the motivation-performance cycle.

Research Outcome

In Part VI evaluation of the data gathered is conducted against each service improvement indicator in order to determine the success of the department restructure. The researcher gathered the data from which an argument for improved service delivery was made. In order to gain greater understanding of the situation, the argument was then critically analysed, beginning with the interpretation and categorisation of the data and followed by reasoning for or against the original argument. After this, a final claim could be made regarding the level of service improvement against each improvement indicator. The final claim identified the level of success of the restructure against the service improvement indicator being evaluated, thus giving rise to the actions required to achieve further success. The conclusion of the analysis of the level of service improvement achieved

addresses the problem situation by adequately answering the first part of the research question posed, namely that of the level of service delivery improvement.

Hypothesis

In Part VII, the researcher analyses critical incidents logged by the scheduling manager during the department restructuring and formulates a hypothesis of restructure through the use of causal loop diagrams. The hypothesis of restructure provides a synthesis of guiding principles for managers wanting to embark on a restructure or change process, and explores the relationship between staff motivation and performance. From the hypothesis of restructure, a motivation-performance model emerges, describing the relationship between staff motivation and performance as experienced during the restructuring process of the scheduling department and crucial to ensuring department sustainability into the future. The defining of the hypothesis of restructure thus concludes this section by adequately addressing the second part of the research question, mainly that of the requirements for ensuring improvements in service delivery through the maintaining of staff motivation and performance.

Reflection

Part VIII concludes the research process with an overview and reflection of the research journey undertaken. In this section the critical outcomes and learnings are also identified, thereby, defining the next cycle of research to be conducted. In conclusion, the researcher reflects on the department restructure and his personal account of the research journey undertaken in this study.

PART I

DESCRIPTION OF THE PROBLEM

CHAPTER 1 – DEFINING THE RESEARCH TOPIC

1.1 Introduction

With increasing competition and ever tightening margins, change within corporate business today is continuous and vital to organisational survival. Companies today embark on change processes in order to seek out improvements and to implement new initiatives to stay abreast of the competition. The adage if you are not changing, you are dying holds true, as companies recognise that they will cease to make a profit and, hence, cease to exist if they are not constantly evolving and adapting to meet the changing needs of their customers.

Many changes made within big corporations today involve the changing of processes and procedures within the organisation as a whole, or within a particular area of the business or department, with the purpose of streamlining current practice to a more cost effective and improved service operation. Departmental changes are often brought about by some inherent problem that has been identified, or through the need to make improvements that will lead to department efficiencies, so as to ultimately effect an improvement in customer service. Improving the overall effectiveness of a department may include streamlining to reduce costs, improve service or ensure the future sustainability of the department, or a combination of these. Whatever the reasons for restructuring, the decision is not an easy one. Depending on the extent of the restructure, the process can be both time-consuming and costly, and require significant planning and change management in order to ensure success.

In the case of the scheduling management team in a leading international oil company, success is dependant upon management's ability firstly to identify the reasons for change and the problems preventing the department from being effective and, secondly to drive the change process to achieve the identified improvements without negatively affecting staff motivation and performance. Hence, correctly defining the end result to be achieved through the restructure is a cornerstone to achieving success. Furthermore, the manner in which management approaches a departmental restructure is also vital to success. The restructuring process needs to be well thought out and the project planned to the last detail. The "plan" for restructure could also be based on some previously successful model or proven design that will promote success. The model on which the restructure is based will depend upon both the reasons for, and the nature of, the change required. In the case of the scheduling department restructure, the model for restructure was the defining of co-located cluster teams with the purpose of bringing about improvements in role interactions and procedures,

with the view to improving team service outputs. The idea to base the restructure on the model of co-located teams was the result of the scheduling manager's limited knowledge of the manufacturing cell proximity model, used extensively in industry to bring about efficiencies in production lines. For purposes of clarity the scheduling manager is the researcher and author of this dissertation.

The scheduling department co-location restructure is described in detail in the following section. This section forms the basis for research by clearly defining the research topic and problem to be addressed through research.

1.2 Overview of the scheduling department restructure

Before the scheduling department restructure is discussed in detail, it is important firstly to describe the department's organisational fit and the role that the department plays in terms of the order fulfilment process (the process from the time that the customer places an order with the company to the point at which the order is delivered and the customer is invoiced). Figure 1.1 below depicts a high level view of the scheduling department's organisational fit.

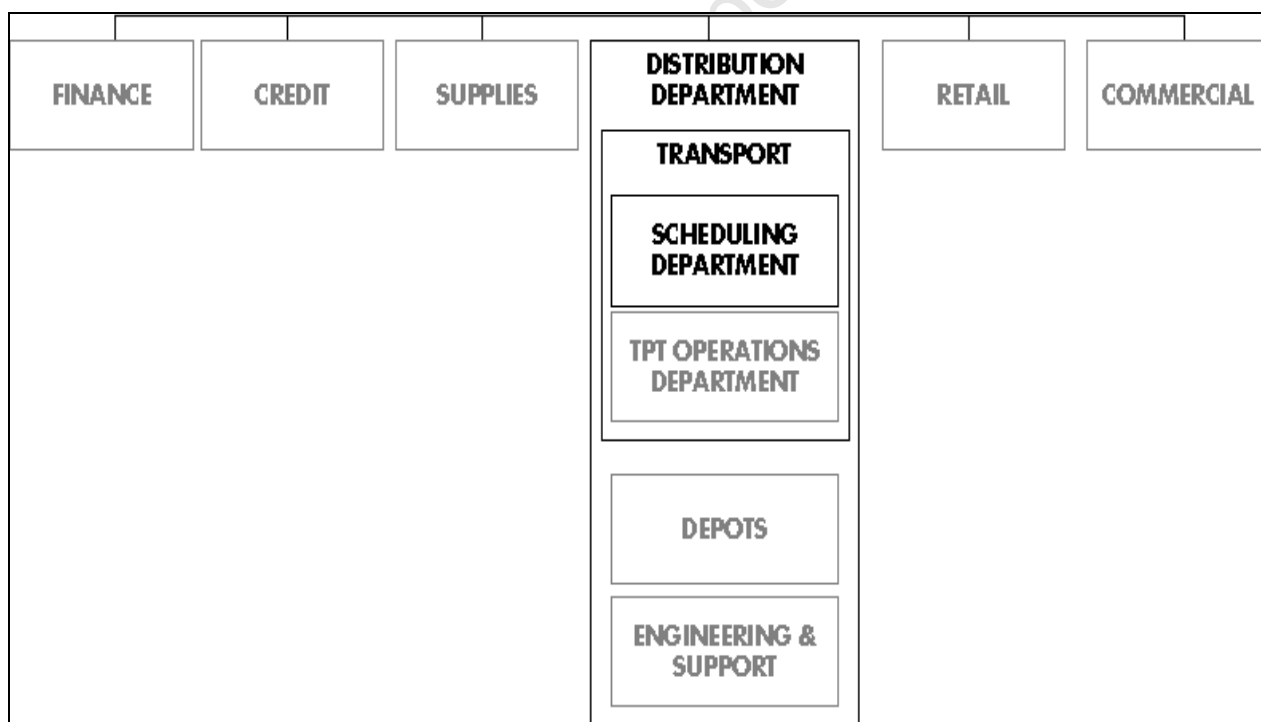


Figure 1.1 Scheduling department organisational fit,

Examples of departments across the organisation are credit, finance, supplies, distribution, retail and commercial. The scheduling department reports into and forms part of, the distribution department. Within the distribution department there is the transport department, consisting of the scheduling department, and the transport (TPT) operations department. The two elements of the transport department (scheduling and TPT operations) work hand in hand to deliver the finished

product to the customer. The scheduling department produces and manages the daily implementation of the delivery schedules to each depot. The TPT operations department supports scheduling by ensuring the availability of the correct number of vehicles and drivers, as well as the correct vehicle configurations, at each depot, in order to deliver the schedule plan. Therefore, as the department responsible for daily planning and schedule management/implementation, the scheduling department has a crucial role to play in the order fulfilment process.

The order fulfilment process is depicted in Figure A.1 of Appendix A. Bulk fuel customers either place their orders with the customer service centre or they submit their tank product dip levels directly to the scheduling department (this and the roles within the department are discussed in detail in section 1.2.1 below). The order set is then scheduled daily to fit the fleet available at each depot and final delivery schedules are produced. The delivery schedules are then submitted to the depots and the respective depot then implements the plan. The deliveries are made to the customer and the customer is then invoiced for payment, thus concluding the order fulfilment process.

After numerous complaints from customers, and other departments within the company, regarding the inability of the scheduling department to provide any form of quality service, the distribution management team decided to act. The management team began with the appointment of a new scheduling manager that had the acumen to bring about the necessary changes required to improve the department's service delivery. The newly appointed scheduling manager (researcher) was thus tasked with identifying, defining and implementing the full restructuring process in response to the growing concerns within the company regarding the level of effectiveness of the department. However, before embarking on the restructuring process, the distribution management team conducted a focus group diagnosis session. The diagnosis began with the identification of the key problems inherent in the department at the time. The resultant force field analysis, depicted in Figure 1.2 below, represents the restraining forces identified through the focus group session that were preventing the department from offering an effective service to its customers. Figure 1.2 also indicates the driving forces or target areas that would deliver the required improvements.

Force Field

Scheduling Department Poor Service Delivery

Ideal State: A department that consistently delivers exceptional service to its customers

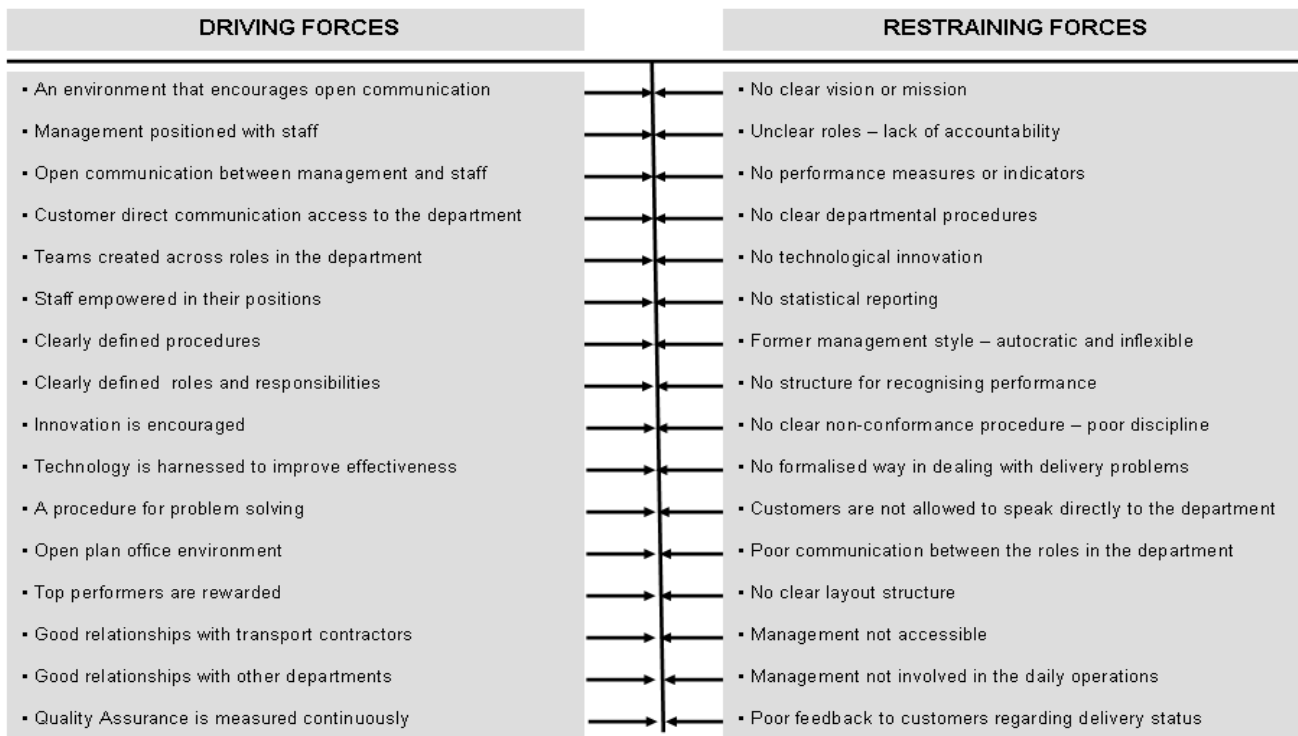


Figure 1.2 Force field analysis

The force field analysis identified many areas for change. To understand the approach to restructuring required by the scheduling management team in order to bring about the desired improvements in service delivery, it is important to identify the relationships between the variables that were preventing good service. The Causal Loop diagram, depicted in Figure 1.3 below, gives insight into the interactions plaguing the department at the time. It also identifies the focus areas required through the restructure in order to bring about the desired improvements in service delivery.

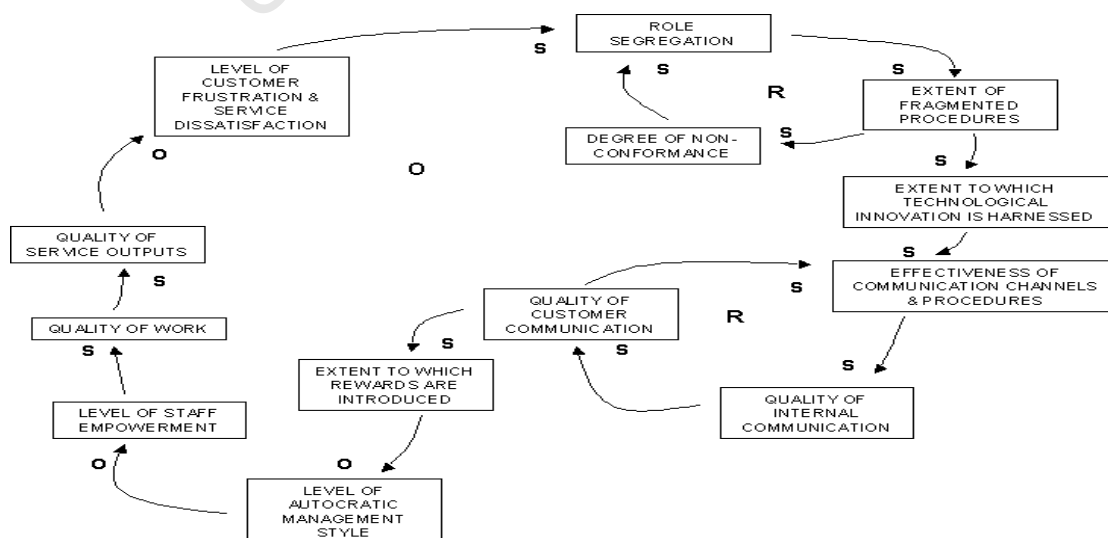


Figure 1.3 Causal loop diagram – Defining the service issues

Without role alignment the procedures between roles will be fragmented. Fragmented procedures lead to non-conformance, due to the lack of clearly identified and enforced procedures. In turn, fragmented procedures drive the extent to which management will focus on harnessing technological innovation in an attempt to improve the quality of procedures in the department. The introduction of technological innovation will increase the effectiveness of communication channels and procedures, resulting in an increase in the quality of internal communication. An increase in the quality of internal communication will lead to an improvement in communication with customers. An improvement in the quality of communication with customers will in turn drive the extent to which staff are rewarded, thereby reducing the level of autocratic management style by the management team. A reduction in the level of autocratic management style will lead to an increase in staff empowerment as staff are given greater scope for decision making, thereby defining the quality of service outputs by the team. This, in turn, defines the level of service satisfaction and level of customer frustration derived from the department outputs.

Therefore, the review of the driving forces and causal loop diagram above, identifies a restructuring strategy requiring focus on three broad aspects, namely, the physical structure or layout of the department (role co-location), the quality of work within the department through role alignment and non-conformance as depicted in Figure A.2 of Appendix A. The strategy proposes that by increasing the quality of work produced within the department, by improving the physical structure or layout of the department and by reducing levels of non-conformance within the department, communication channels will be dramatically enhanced, thus resulting in improved service to customers or customer value. The three high level focus areas can be further extrapolated as follows:

- Physical structure changes:
 - Inter-role communication
 - Co-located cluster teams
 - Communication changes with customers
- Quality of work:
 - Role alignment / clarity
 - Quality assurance
 - Technological advancements
- Non-Conformance:
 - Department non-conformance/ discipline
 - Contractor non-conformance

The restructuring changes made to the department under each key focus area are described in detail below.

1.2.1 Physical structure changes:

i) Inter-role communication

Structural changes to the department layout were identified as a primary focus area during the restructuring process and a key driver to improve internal communication channels. To appreciate the full extent of the associated structural problems, it is important first to examine the roles within the department and the interactions between these roles. There are three roles in the department, namely the schedulers, the delivery controllers and the manual pre-planners.

The scheduler is responsible for daily planning of vehicle schedules for the 22 depots across the country. The scheduler imports the daily order set from the customer service centre and the pre-planners, and receives the vehicle availability listing for the next shift from each depot. With this information, the scheduler then makes use of the CROSS scheduling system to generate (schedule) trips for each vehicle, matching the order set to the available vehicle fleet. Once completed, the scheduler submits the schedule for the next shift to the respective depot for implementation.

The delivery controller's role is two-fold. Delivery controllers are responsible for managing the schedule produced by the scheduler, at the time that the schedule is implemented by the depot. They ensure that the schedule is implemented by the respective depot exactly according to plan, and have exclusive system rights to make changes or amend trips during schedule implementation. This means that ownership of the schedule and implementation of changes to the plan, remains exclusively with the scheduling department and not the respective depots. Therefore, when comparing the responsibilities of the scheduler and the delivery controller to the schedule, the scheduler is responsible for schedule creation and the delivery controller takes over this responsibility, together with ownership of the post schedule completion, thus ensuring its implementation. The delivery controller's second area of responsibility is to answer delivery related problem calls directly from bulk fuel customers, to accept responsibility for the problem and to resolve it by using a set problem solving procedure.

The pre-planner is responsible for stock and order management of key accounts, working closely with the scheduler. The pre-planner receives tank product dip levels directly from customers daily and then inputs this information into a stock management program. The program then calculates tank ullages (available space left in tank) "triggering" tanks that require delivery and suggesting delivery quantities. The pre-planner then places orders for the suggested quantities and then hands the plan to the scheduler for inclusion in the schedule. The pre-planner works closely with the scheduler to ensure that the pre-plan orders are scheduled on the next shift. The scheduler then extracts the orders and plans them accordingly.

The communication and interaction between the respective roles in the department as described above can be depicted schematically. Figure A.3 of Appendix A depicts the interactions between the respective roles, including communication with the customer and depot staff. The relationship between the scheduler and pre-planner is crucial in ensuring that the highest quality schedules are produced. Communication between these two roles goes on for most of the day as they match order size to fleet availability and “what goes when and where”. The scheduler also communicates daily with the depot, verifying the bulk fuel delivery vehicle schedules with the depot staff, before submitting the schedule to the respective depot. Special requests from customers (for example: 1st trip delivery request) are received by the scheduler via the delivery controllers. The delivery controller receives calls from customers and resolves the associated delivery problem, which is also a critical communication path. The delivery controller liaises hourly with the depot, confirming trips and recording failures for the day, including finding out vital information about the status of any particular trip. In terms of customer service, the interaction between delivery controller and depot is a critical path, because customers rely heavily on the accuracy of information emanating from the depot, and which the delivery controller then passes on. The interaction between pre-planner and delivery controller should not be underestimated either, if a “pre-plan customer” calls in with regard to a delivery problem, query or request, this communication must be channelled through the delivery controller to the pre-planner, so that the pre-planner can check dip levels and initiate another delivery plan for the customer on the next shift, or respond to the query or request. The pre-planner may also, from time to time, engage the customer directly with any issue or information regarding the stock planning for that particular customer.

Having reviewed the interaction between the roles in the department, a key question can now be asked: How effectively does the department’s physical floor structure match and support these interactions? In order to answer this question, role co-location changes are described in detail in the next section.

ii) **Co-located cluster teams**

By comparing the required role interactions, as depicted in Figure A.3 of appendix A, with the original floor layout of the department prior to the restructure, as depicted in Figure 1.4 below, it is clear how anomalous the floor structure is in relation to the role interactions.

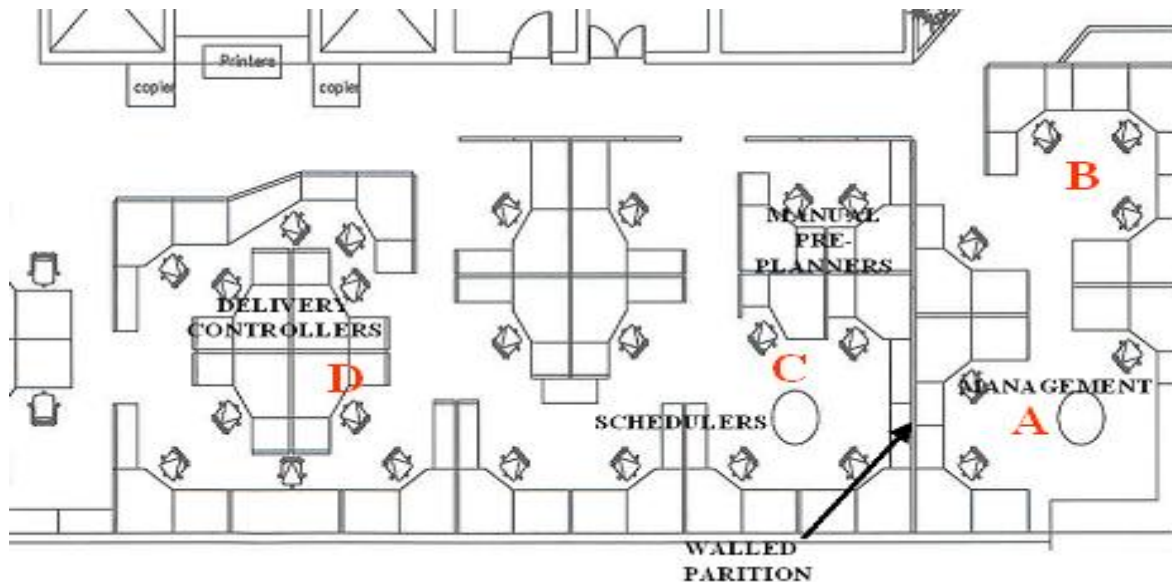


Figure 1.4 Floor plan prior to department restructure

In the floor layout prior to the department restructure (Figure 1.4 above), the three roles are seated in separate sections, as job specific teams. A closer look at the former role positioning reveals various problems with this layout:

- Office space A depicts the position of the management team, comprising the scheduling manager, a delivery control supervisor and one support admin staff member, positioned behind a walled partition. The importance of the role interaction between the three key roles in producing quality outputs has been made clear, but the role interaction between management and the respective roles in an operational environment, such as this one, is equally important. As the management team is seated away from the roles of the department and, hence, the transport related operations of the company, on-going and effective knowledge, expertise and direction by management to daily operational problems is compromised under the current structure. Due to the nature of the scheduling department, the work environment within the department is operational in the truest sense. It is a hive of activity as the department manages, and is accountable for, fuel deliveries from depot to customer throughout Southern Africa on a daily basis. The operation, therefore, requires on-going management response and interaction to problems that may exist through the order fulfilment process, as the department mitigates such problems with prompt solutions that will ensure continued deliveries. Therefore, positioning the management team in isolation away from the rest of the department will prevent pro-active management of the day-to-day operations. This divide between management and staff does not support a participative management style or a collective team effort. Such physical separation in any corporate environment today is in danger of encouraging an “us and them” divide between management and staff that can be extremely disruptive to the quality of team outputs.
- Office space (B) depicts the position of the pre-plan supervisor to which the pre-planners report. The separation of the supervisor from his/her team of pre-planners, who are seated on the other side of the wall at position (C), is clearly visible.

- Office space (C) depicts the position of the pre-planners and schedulers in relation to one another, all of whom are seated separately in job specific teams. As previously mentioned, this does not support the important interaction between the two roles. Furthermore, a communal meeting table is positioned between the desks in this area and is used as a recreation area. Participant observation by the scheduling manager (researcher) revealed that such a set up encouraged social breaks that distracted staff who were working in close proximity to the “social” area. Under the old management team, and prior to the restructure, socialising was both permitted and unsupervised within this area.
- Office space (D) depicts the delivery control team’s seating arrangements that are not only extremely cramped, but also separate from the rest of the department. As a result of the close proximity of the delivery controllers telephone communication with customers may well be hindered. Isolation of the delivery controllers from the schedulers and pre-planners lends itself to segregation of responsibility, because delivery controllers view themselves as a separate team and thus have no sense of collective responsibility. The scenario may exist that if a delivery controller does not perceive himself/herself as part of the collective team, this division may result in poor communication and, ultimately, weaken problem-solving initiatives. An “us and them” environment may prevent the resolution of customer delivery related problems because the schedulers and pre-planners are either less accessible or not engaged by the delivery controllers.

In summary, the problems inherent in the original floor structure in terms of role location is clearly evident, from segregation across the roles and management, to management’s inability to engage effectively with the daily operations. It is thus imperative that management rectifies these structural problems by aligning structure to roles.

In order to rectify the problems with the current floor structure identified above, the scheduling manager (researcher) designed a new and more robust structure, comprising four co-located cluster teams. As previously mentioned, this new structure was based on the principle of the manufacturing cell proximity model, which is used in factories and manufacturing plants to streamline production line processes and procedures. The implementation of the co-located teams in the scheduling department is compared to the manufacturing cell proximity model in some detail in the literature review in Chapter 4. This review explores the research conducted by other authors on the topic of co-located teams for improved service. Figure 1.5 below depicts the new floor structure based on the manufacturing cell proximity model.

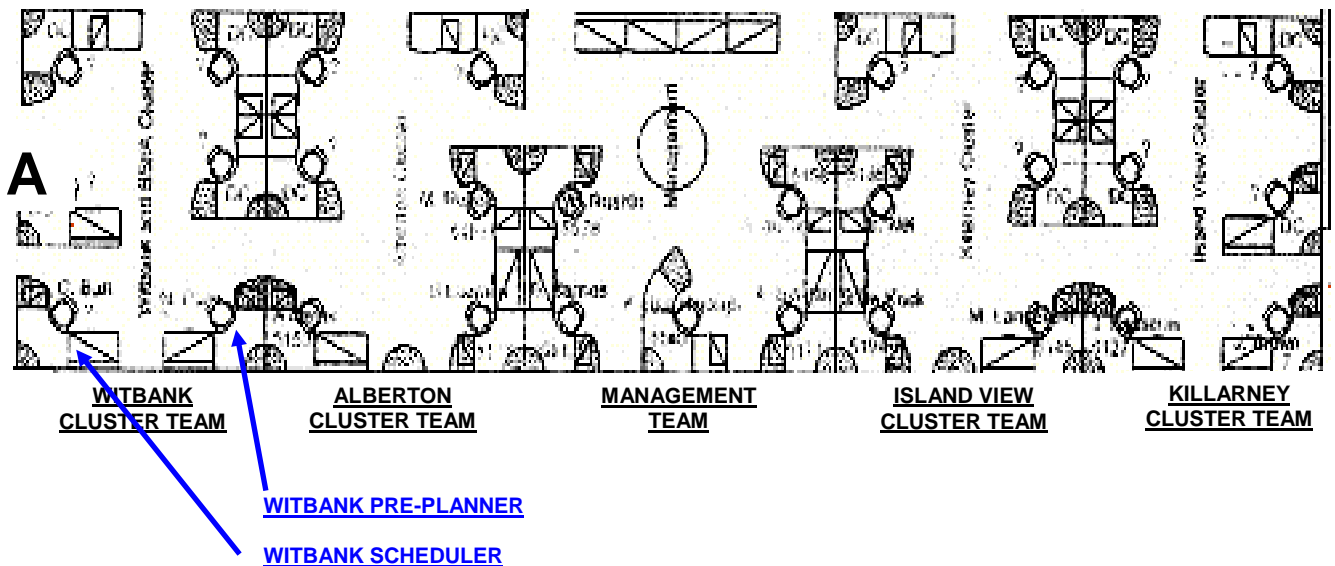


Figure 1.5 New floor plan after department restructure

In order to address the problems identified with the original floor structure, the following changes were implemented, marking the start to the department restructuring process:

- Management team operational involvement – The wall separating the management team from the rest of the team was removed and the management team was positioned in the centre of the department. This action was taken to provide management with direct control of the floor, the order fulfilment process and operations. It was designed to create an environment for immediate and pro-active response to daily operational problems (e.g. depot stock outs, vehicle breakdowns, driver strikes etc). This new seating arrangement allows for a more participative management approach. It breaks down the barriers between staff and management by placing management at a “staff level” and allowing all roles in the department to operate as a cohesive unit or team in a highly stressed operational environment.
- Role interaction – Four co-located cluster teams, two on either side of the management area, were formed, each team comprising a scheduler, a pre-planner and delivery controllers for a specific cluster of depots. By seating all of the roles in the same team and aligning their responsibilities to specific depot operations, management sought to achieve improved interaction that is linked to aligned procedures and, hence, towards a common service output. The new teams incorporating all roles are now better placed to service the customer. Figure 1.5 (A) above depicts the improved positioning of the cluster scheduler and the pre-planner. Not only have the schedulers and pre-planners been seated next to each other in each co-located team, but their job specific responsibilities have also been aligned. Prior to the restructure, pre-planners would manage stock for customers across more than one depot cluster. This meant that a pre-planner would have to interact daily with more than one scheduler, consequently, slowing communication and work performance. When the cluster teams were introduced, however, the pre-planners were given accounts that belonged to a specific depot cluster, thereby simplifying and personalising the interaction between scheduler and pre-planner. The

importance of this change is made clearer when “communication changes with customers” is discussed in section iii below. By grouping the various roles into teams, the “us and them” syndrome between the roles can be addressed. Furthermore, expertise among staff is achieved as staff members are assigned to a team that works specifically on certain depots, while still maintaining flexibility to act as a relief for another cluster team when the need arises. This environment is also suited to cross-functional expertise because delivery controllers can be trained to relieve pre-planners and schedulers during periods of absenteeism and leave.

iii) **Communication changes with customers**

Before the restructuring of the scheduling department, a customer with a delivery related problem or query would phone the customer service centre. The customer could not speak directly to delivery control (the problem solver). A service co-ordinator in the service centre (CSC) would receive the call, record the details of the problem and then, electronically, refer the note log outlining the problem to the delivery control team, seated in office space (D) of Figure 1.4 above. The delivery control team would then attempt to resolve the delivery related problem. They would read the note log, approach the scheduler for a solution to the problem and then update the note log with the solution. The service co-ordinator in the CSC would then phone the customer (if the customer hadn't phoned in again) and inform the customer of the solution. This former problem-solving process is depicted in flow chart format in Figure A.4 of Appendix A.

The fact that the customer was unable to speak directly to a delivery controller posed a significant problem in terms of the scheduling department's ability to effectively service the customer. The fundamental flaw in the referral process was timing. There were delays as the customer's problem would be addressed only when the delivery controller responded to the note referred to them by the service co-ordinator in the CSC. Further flaws identified with this communication channel were:

- Misinterpretation of the note log by the delivery controller could inevitably lead to a misunderstanding of the seriousness of the delivery-related problem. This could result in less serious problems being resolved at additional cost to the company, while serious problems were reviewed too late or even overlooked.
- Repeated note log referrals would have to be made to the DC's by the service co-ordinators when customers made repeated phone calls to the CSC if time had lapsed with no feedback to the customer, resulting in duplication of resource effort.
- There was no environment for immediate or “live resolution” of a problem
- There was no set problem solving structure for delivery controllers to follow, each person resolved the problem in his/her own manner, implementing what he/she thought was the right solution.

The referral process was largely ineffective because problems were often reviewed too late to be resolved. The only improvement that the delivery control team introduced at this stage in the

“evolution” was the dedicated focus of one group to handle specific delivery related problems. In order to improve this communication channel, and create an environment for live resolution of a problem, the new scheduling management team decided to introduce a direct communication channel between customer and delivery controller, allowing the customer to speak directly to the “problem solver”. This direct communication channel is depicted in Figure A.5 of Appendix A.

The management team went a step further and aligned the customer’s call to the respective cluster teams. This was done by re-programming the Interactive Voice Response or IVR telephone system, to identify a customer’s supply depot and then routing the customer to the correct depot cluster. The routing of customers to the correct depot cluster is depicted in Figure A.6 of Appendix A. By doing this, the management team has succeeded in gaining alignment between the location of the problem and the respective depot. The advantages of this are that the cluster teams receive in-coming calls that are directly related to the supply depot and hence available expertise (knowledge of the specific depots) can be utilised to resolve the problem quickly. In summary, by introducing direct access to the department with alignment to depot cluster teams, the restructure has achieved the following:

- The creation of an environment for live resolution of delivery problems;
- Delivery controllers no longer work in isolation to resolve a problem, but are now seated with the scheduler, who plans the deliveries for the particular depot cluster, and the pre-planner, who stock manages for particular customers within the cluster of depots, so a call is aligned to the role responsibilities in each cluster team;
- The creation of an environment for experience building amongst staff because delivery controllers become familiar with the customer specifics of the cluster within which they operate. This also enhances the quality of problem resolution they are able to offer customers.

1.2.2 Quality of work:

i) Role alignment

Once the restructuring of the floor was completed and customers had direct access to the department, the next step in the restructuring process was to align roles to match the new structure. Role alignment took the form of identifying those jobs within the old structure that did not create value, making them redundant and creating new, more robust, roles where required. In order to explain this in more detail, a comparison of the old and the new organograms is made. Figure A.7 of Appendix A depicts the old organogram prior to restructure, illustrating the separate job related teams. Figure 1.6 below shows the transition from old to new with the identification of redundancies, while Figure 1.7 below depicts the new organogram after the changes were implemented.

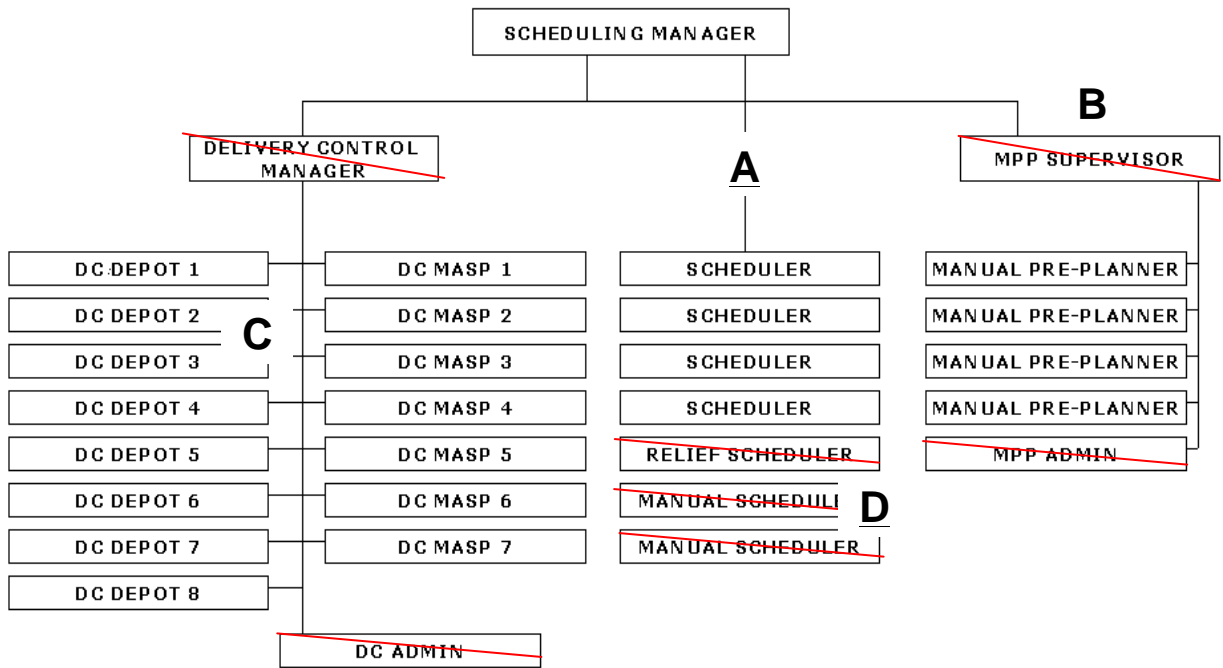


Figure 1.6 Organogram transition – Job redundancies

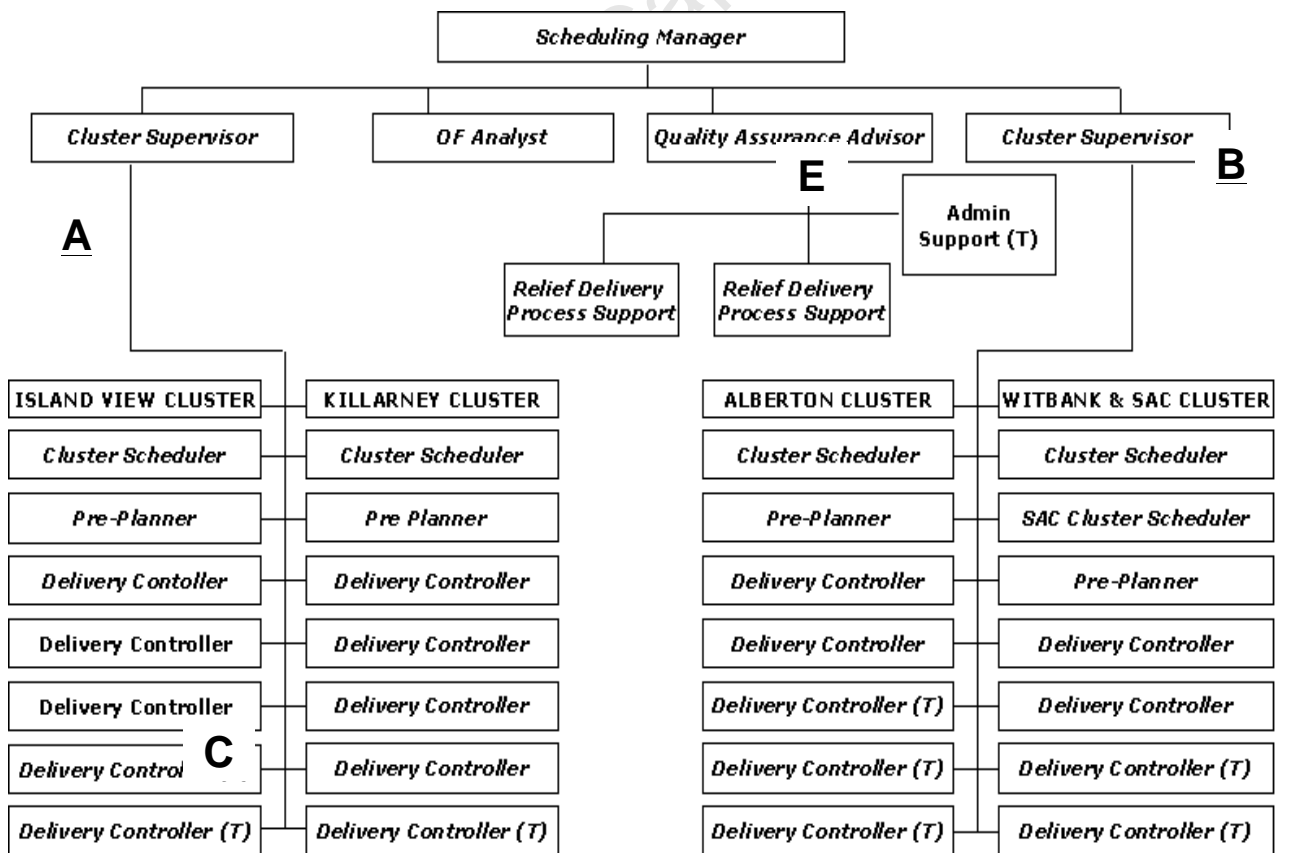


Figure 1.7 Newly transformed organogram after the restructure

A comparison between Figure 1.6 and Figure 1.7 and with reference to the lettering, reveals the following key changes:

Reporting lines: (A) of Figure 1.6 indicates the reporting line of the schedulers directly into the scheduling manager while the pre-planners report to a pre-plan supervisor and, similarly, the delivery controllers report to a delivery control manager. The problem with this unbalanced reporting line is twofold. Firstly, the nature and complexity of the scheduling manager role means that the scheduling manager cannot attend to the daily needs of a separate team in the department. Secondly, the direct reporting line to the scheduling manager automatically elevates the schedulers above that of their fellow colleagues because they have a higher reporting line in the department. This irregularity supports the “us and them” syndrome inherent in the department at the time of restructure. In order to rectify this, the cluster teams were made to report directly to a new role, the cluster supervisor, as shown in Figure 1.7 (A).

Supervisor alignment: (B) of Figure 1.6 shows the redundancies of the roles of delivery control manager and pre-plan (MPP) supervisor. These roles were replaced by the two cluster supervisor roles as depicted in Figure 1.7 (B). With this change, the roles of scheduler, pre-planner and delivery controller all have the same reporting line. In an operational environment such as this one this change becomes important because the supervisors manage the floor and can now give equal attention to all staff on a daily basis.

Delivery control team alignment: (C) of Figure 1.6 shows the split in the delivery control team into two positions, namely delivery control depot (interface with the depots daily) and the delivery control MASP, or ‘most appropriate service provider’ (receiving electronic notes from the CSC). As a result of the changes made to the customer’s access to the department (from referral process to direct access), it was necessary to form one role within the cluster teams as depicted in Figure 1.7 (C).

Role redundancy: (D) of Figure 1.6 depicts the roles identified through participant observation that do not create value to the point where their existence was unjustifiable. The delivery control and pre-plan administration roles were made permanently redundant. The two manual scheduler roles were designed to manually schedule specific owner-vehicle drivers. This arrangement was both inefficient and costly, given the sophistication of the CROSS scheduling system that, in this case, could not be used. So it was decided to disestablish these positions, and to load the specific vehicle information for these drivers onto the CROSS scheduling system and schedule them in the normal manner. This brought about a cost reduction in terms of use of the scheduling system and also brought increased volume scheduled onto the system, a global KPI. The position of relief scheduler who relieves the main schedulers when they are absent or on leave was also disestablished. As mentioned previously, the new structure promotes multi-skilling of staff and the delivery controllers have been trained to relieve schedulers, thus helping to ensure a very good sustainability position.

New role creation: The most critical element for improving the scheduling department’s ability to effectively service its customers was the introduction of a quality assurance position with supporting roles. This role was introduced 6 months into the restructuring process and is designed to analyse

the daily performance of all staff in their roles, with the aim of improving overall quality. The success of this role is described in more detail in section ii below. The two staff originally in the manual scheduler positions were re-appointed to a new position called delivery process support. This new role supports the quality assurance advisor role, while also performing an administrative function in the department.

ii) Quality assurance

As previously mentioned, prior to the restructuring of the department, there was no method of measuring the quality of work produced by the department. This was a significant setback due to the scheduling department's important role in the order fulfilment process. Without quality checks, errors in work output would go un-addressed, thereby negatively impacting on the company's ability to provide an effective fuel delivery service. Therefore, in order to ensure quality output by the department, the new scheduling manager introduced a new role, namely Quality Assurance Advisor. The quality assurance advisor's responsibilities are to carry out and complete weekly assessments on the work output of every staff member in the department. The weekly quality assurance cycle begins with preparation and information gathering on Monday. From Tuesday to Thursday the assessments are completed and on Friday the assessed staff are given feedback on the job. Thus, through this process, staff are continuously being shown what they have done well and where improvement is required. Good behaviour is, therefore, continuously reinforced with ongoing feedback. On completion of a four-week cycle, the results for each individual are calculated and incorporated into KPIs (Key Performance Indicators) for each individual staff member. The results are then "rolled up" into a reward structure. The top performers are recognised in a monthly reward ceremony every month, a process designed to motivate and to recognise good performance. Table 1.1 below shows the quality assurance cycle. As depicted, the cycle is structured, ensuring that quality assessments are on going and that the quality assurance advisor meets the reward ceremony deadlines at the end of every cycle.

| QUALITY ASSURANCE 4 WEEK CYCLE | | | | | |
|---------------------------------------|--------------------|----------------------------|---------------------|--------------------|--------------------------------------|
| Task | Monday | Tuesday | Wednesday | Thursday | Friday |
| | Data Preparation: | Assessments: | Assessments: | Feedback Sessions: | Feedback Sessions: |
| 1 | 30 Contacts | 30 Delivery Control Sheets | 1 Pre-planner Sheet | 1 Pre-planner | 6 Delivery Controllers |
| 2 | 5 Schedules | | 5 Scheduler Sheets | 1 Scheduler | |
| 3 | 1 Pre-plan Stats | | | | |
| 4 | Reward Preparation | | | | Reward Ceremony End of week 4 |

Table 1.1 Quality assurance cycle

Assessment sheets and KPIs have been defined for each role in the department and are depicted in Figures A.8 to Figure A.12 of Appendix A. Quality assurance and KPIs go hand in hand in driving quality of work and performance of staff. Quality assurance is actually a defined KPI and, as such, is incorporated into the KPI scoring in order to determine a final performance percentage for each staff member.

In Figure A.8 of Appendix A, the scheduler's KPIs are listed. Capacity utilisation is a KPI that measures how effectively the scheduler has planned the vehicles to full capacity. Schedulers have to achieve an average vehicle loading of 92% per trip planned. Time utilisation measures how effectively the scheduler has planned the vehicles to time. It is the measure of how well each vehicle has been planned in terms of the allotted shift time. Schedulers have to achieve 72% time utilisation in their planning. If a scheduler cuts an order by more than 10% of the original order quantity due to vehicle size restrictions, the cut results in significant inconvenience to the customer. Therefore a KPI has been set to minimise order cutting and is set to 1% of total orders scheduled. The KPI, individual performance tracker, is the non-conformance results (discussed in detail in section 1.3.7) and is designed to drive staff behaviour to reduce non-conformance in the department. In order to encourage schedulers to follow their order prioritisation process and to schedule oldest orders first, a daily order status report is produced that shows management the overdue status of orders. The target for this KPI is an average order status of less than 2 days. In other words, orders must be scheduled within two days of being received. The quality assurance results, based on the assessments carried out, are added and have a 30% weighting to the total KPI score. The quality assurance schedule evaluation includes an assessment of how effectively the scheduler is pulling orders early for planning, how effectively he/she is actioning the callouts to customers who repeatedly return product, how effectively the scheduler is extracting and prioritising orders and, finally, the quality of the physical schedule and the schedule data that has to accompany every schedule.

In Figure A.10 of Appendix A, the delivery controller's KPIs are listed. The first, and most important, KPI set for the delivery controller is the inbound call rate that measures how many customer calls are answered on each shift. The delivery controllers must achieve 40 calls or more per shift. This target is extremely important because the department is measured weekly on its ability to answer customer calls within 20 seconds of the call being received. This is the delivery controllers second KPI, namely the telephone service level. The quality assurance assessment results for delivery controllers have a 30% weighting, with a target of 80% that must be achieved.

When looking at the assessment sheet of the delivery controller in Figure A.9, the main area of focus is the delivery controller's ability to effectively problem solve. The results show management how effectively the individual is following the prescribed problem solving decision tree. (The problem solving decision tree is depicted in Figure A.13 of Appendix A and lays out a formalised process of resolving a fuel delivery problem.) When the delivery controller receives a call from the

customer, he/she is first required to gather all relevant information pertaining to the problem. Once the information has been gathered, the urgency of the problem and the customer's status with the company will indicate to the delivery controller whether he/she needs to assist the customer on the current shift schedule or, on the next evening shift, or on the next day shift. When logging the call received on the computer system, the delivery controller must provide evidence of the problem solving decision tree steps in the note log. The quality assurance advisor works through the note log and listens to call recordings, in order to complete the problem solving assessment. The delivery controller's work shifts and, therefore, punctuality in terms of work start times and team and lunch breaks, are crucial in order to meet the telephone service levels. Therefore, the KPI adherence to schedule is designed to measure delivery controller time keeping, thus ensuring that the inbound telephone service level is not compromised. As is the case with the schedulers, an individual performance tracker measures individual delivery controller non-conformance.

In Figure A.12 of Appendix A, the pre-planner's KPIs are listed. A quality assurance assessment sheet has not been developed for pre-planners because the assessment of this position encompasses an assessment of the actual KPIs. As mentioned earlier, the pre-planner places orders based on the ullage (available space in tank), and then plans these orders along with the scheduler. The pre-plan forecasting system that is used by the pre-planner provides the pre-planner with suggested order and ullage quantities. What is key for management here, is how closely the pre-planner is planning to the suggested order quantities. Therefore the following KPI, order versus ullage/suggested order quantity, has been implemented in order to ensure that the pre-planner plans as closely to the suggested quantities as possible. The 'demand smoothing' KPI looks at how effectively the pre-planner is initiating deliveries across the days in the week. In order to achieve the best transport economics, planning must be spread evenly over the entire week because this will ensure the best utilisation of vehicles. The Customer's 'run dry' or, out of stock situation, is the most important pre-plan KPI with a weighting of 30%, because a pre-plan customer should never stand without product. The 'Dip cross check' KPI measures the pre-planner's accuracy in entering dips into the forecast system. An exception report, that checks the dip against the previous days' dip and delivered quantities, flags the pre-planner with any anomalies. How effectively the pre-planner clears the exceptions, ensuring that the dip submission into the system is 100% accurate, is driven by this KPI. As with the 'run dry' KPI, product returns from customers as a result of poor planning is an occurrence that should never take place, in view of the fact that the customer's tank ullage is known at all times. The individual performance tracker also measures pre-planner non-conformance.

The detail of quality assurance focused on staff performance, ensures a significant contribution to the quality of work produced within the scheduling department; a focus that is crucial to the overall quality of outputs and service by the department.

iii) Technological advancements and reporting

Since the restructure, the scheduling manager and his team have identified various areas where technology can be harnessed in order to bring about improvements in service. The following areas have been identified and programs written to enhance the department's service to customers:

- 1) Improve feedback to customer – Automated SMS notification and implementation of telephone IVR automated schedule update
- 2) Improve planning accuracy by the pre-planner – New forecast program implemented in order to make planning more accurate
- 3) Improve communication with depots – New electronic schedule program
- 4) Touchless order processing – Cross Pre-planning

The technological advancements implemented by the management team are not only addressing the quality of work, but also have a direct impact on improving internal and external communication.

The SMS notification is key to improving communication to customers. When the scheduler completes the schedule for the following shift, SMS's are automatically generated and sent to customer's cell phones advising them of what shift they have been scheduled, the quantities to be delivered and the trip details. Furthermore, an SMS is sent out automatically if a scheduler cuts the original order by more than 10% of the original order quantity, and also advises the customer if an order has not been scheduled.

Prior to the restructure, the pre-planner made use of a basic Excel spreadsheet to manage customer's stock. This was a manual process and, consequently, time consuming because the pre-planner had to manually calculate and determine ullage levels and order quantities. An example of the former stock management spreadsheet is shown in Figure A.14 of Appendix A. After the restructure, a new automated forecasting program was written and implemented. Figure A.15 and A.16 of Appendix A shows examples of two screens from the new stock management system. Because the old spreadsheet format used by the pre-planners was both manual and time consuming, there was a limit to the number of customers each pre-planner could plan for on a daily basis. The new forecast tool calculates the customer off-take, the available ullage in tank and determines the suggested order quantities, and has an automated customer notification and reporting system. The automation introduced by the new forecast tool has resulted in the pre-planner being able to plan quicker, thereby dramatically increasing capacity in terms of the number of customers that can be planned at once, while extensively improving planning accuracy. An automated reporting functionality, built into the stock management system, has allowed management to gain access to detailed pre-plan information, such as stock frequency in days, customer sales or off-take patterns, that previously could only be accessed by manually analysing the Excel spreadsheets.

Once the scheduler has completed the schedule for the following shift, the schedule is submitted to the depot by faxing a hard copy to the respective depot. Once faxed, the hard copy is made available to the delivery controllers so that they can manage the implementation schedule. The delivery controllers record information relating to each trip by scribbling footnotes on the hard copy. If a trip fails, they write the reason on the schedule; and make similar footnotes if they make a trip change, or add or remove a customer from the schedule. This process is flawed in a number of areas. Firstly, information can be lost due to poor explanations, notes may not always be legible and the paper trail is immense. Furthermore, management has no way to compare the planned schedule to the actual implementation by the respective depot, thus making vehicle driver non-conformance difficult to detect and manage. After the restructure, however, the new management team was able to identify these flaws and had a program written called the electronic schedule or E-Schedule. The E-schedule is a web-based program that represents the schedule in web page format, feeding in vehicle satellite tracking information, as well as gantry vehicle loading information from each depot. Examples of three screens from the program are depicted in Figure A.17 to Figure A.19 of Appendix A. The advantages gained through the implementation of this program alone are numerous, most important of which are:

- 1) Vehicles are tracked on a map and this information can be passed onto the customer without having to contact the depot;
- 2) The system automatically tracks the schedule plan versus actual implementation of the plan by the depot, thereby giving management insight into transport depot performance;
- 3) Changes to the schedule during implementation are tracked by the program, giving management an indication of any deviations from the plan;
- 4) All trip information such as quantities loaded, customer information and ETA's to customers are available to the delivery controller at the push of a button;
- 5) The reporting functionality is endless, giving management insight into results such as times that trucks left on first loads, trip turnaround times, satellite tracking failure reporting;
- 6) Delivery controllers no longer have to conduct hourly de-briefs with each depot;
- 7) Telephone communication with depots is reduced dramatically;
- 8) Historical schedule information can be stored for years and can assist in the investigation of claims against the company;
- 9) The paper costs and fax costs are eliminated because paper based schedules are replaced by electronic web based ones.

The cross pre-planning process is depicted in Figure F2, Appendix F. The customer submits their stock dip levels for each tank to the scheduling department either via the Internet, SMS, automatic tank gauging (electronic dips) or e-mail. The dips are then entered into the database and validated by the system for accuracy by checking the dip entries against previous dip and sales history. The dips are then submitted to the Cross Pre-planning (CPP) engine and the system generates sales patterns. From the sales patterns, orders are automatically generated, scheduled by the scheduler,

and trips are automatically generated at the depots. The pre-delivery instruction (PDI) prints on the invoice and an SMS is sent to the customer detailing the quantities to be delivered by tank. The delivery is made to the customer and the entire process is repeated again the next day as the customer enters the next dips.

The new management team also implemented a full reporting structure consisting of various reports that constitute important daily communication to other departments within the company. The reports include weekly scheduling statistics per depot, daily operational status at the start of shift at each depot and various transport non-conformance reports. The non-conformance reports have been designed to manage transport performance.

1.2.3 Non-conformance

i) Department non-conformance

The management team has implemented a red card, yellow card, and green card system to deal with non-conformance in the department and has named this the individual performance tracker. Key to the success of this procedure has been a participative management approach whereby staff input into the process assisted in its design, as well as the fact that management is not excluded and management team members can also be issued with a card. If an individual in the department does not perform a task for which he/she is accountable and another member of the collective team notices this; the individual who wishes to issue a red card informs management of the non-conformance. The non-conformance is then discussed with the offender, and the individual who reported the non-conformance, then issues the offender with a red card. A note of this action is made on the offender's performance record, which is publicly displayed on a white board in the department. Similarly, excellent performance is recognised through the issuing of a green card. The green cards achieved are incorporated into the department's reward structure and top performers are recognised monthly. Figure A.20 of Appendix A depicts how the individual performance tracker is incorporated into the quality assurance system, KPI reporting and reward structure. Collectively these elements form the performance management system in the department.

If an individual is issued with a card for non-conformance and it is a first offence, a yellow card is issued. At the time of the discussion between the offender and management, it is ascertained whether error was in fact, a matter of non-conformance or whether it was the result of a lack of training or knowledge of procedure. If it is a training issue, then the quality assurance advisor will arrange on-the-job training for the individual. If an individual receives a second red card for the same offence and it has been established that the situation is a case of "able but not willing", then the human resources performance management process will be implemented and planned performance initiated, in order to correct the unsatisfactory behaviour.

ii) Transport contractor non-conformance

The scheduling department's crucial role in the order fulfilment process has been clearly stated earlier in this chapter, however, a dilemma exists with this situation. The company has outsourced vehicles and drivers to an outside contractor. If the contractor fails to perform consistently then the impact on the scheduling department is significant. If deliveries are not made due to poor contractor performance, the orders have to be re-scheduled. Furthermore, the scheduling department must contact the respective customers and inform them of the non-delivery and, in some instances, try to re-accommodate the customer on the current schedule. Therefore, contractor performance has a significant impact, not only on the customer, but also on the scheduling department.

Before the department restructure, the former management team had no system in place to ensure that the transport contractor's performance was satisfactory. However, after the restructure and the subsequent implementation of the reporting system by the new management team, the team re-designed the "customer service" element of the contractor's scorecard. Furthermore, a full product returns and delivery failures reporting system was introduced into the scheduling department. This system reports on contractor performance and the results are incorporated into the contractor's scorecard and the contractor is then penalised for non-conformance. Figure A.21, of Appendix A depicts the full contractor non-conformance reporting procedure that has been introduced. The process begins with daily feedback from the depot, the daily vehicle availability is given to the scheduler, and hourly de-briefs are done with the delivery controllers in order to determine the progress of deliveries to customers. All information is then gathered in order to establish whether the delivery failure is the fault of the contractor or the company. This information is then updated into a web database and a report on all failures, or non-conformances, is created and sent out to the people responsible by the scheduling department. The contractor then has a week to dispute the non-conformances logged against them and the scheduling management team then approves the disputed claims where the contractor provides evidence to the contrary. Once all non-conformances have been agreed, the final report is submitted to the contracts manager who then finalises the contractor scorecard. By implementing this process, the scheduling management team has ensured the department's involvement and influence over contractor performance, thereby improving the scheduling department's overall management position.

In summary, when relating the extensive restructuring process to Coulson-Thomas' definition of business processes, the scheduling management team embarked on the restructuring process with the key purpose of improving business processes in order to deliver improved service. *"Business Process Re-engineering is the fundamental rethinking and redesign of business processes to achieve dramatic improvements in critical, contemporary measures of performance, such as cost, quality, service, and speed"* (Coulson-Thomas, 1994, p. 41). Given Coulson-Thomas's definition of business process re-engineering, it could be said that the management team embarked on a business process re-engineering project designed to target the critical elements of BPR within the

department, namely the improvement of department performance and quality of work outputs, together with the sequence and combinations of activities that deliver value to a customer.

1.3 Defining the problem

The extent of the scheduling department restructuring process has been described in detail in the previous section. However, although unintentional, the description alleges certain un-refuted service improvement claims. While it is important to assert claims of service improvement due to the defining purpose of the restructure, such claims need to be challenged and proven for validity.

Claims of service delivery improvements as a result of the restructuring process extend across the target improvement areas of physical restructure, quality of work and non-conformance and ultimately, assert that the implementation of a restructuring process, based on role co-location and procedural changes through the formation of co-located cluster teams, has been successful. Until proven, the success of the restructure through the implementation of the changes across the focus areas remains conceptual in the truest sense. Similarly, when reviewing the detail of the restructure, a host of unanswered questions are raised regarding the level of success of the restructure in bringing about the required service improvements. These questions are organised according to target improvement areas and set out below:

In terms of the physical structure changes through role location changes: Has the physical floor restructure actually improved inter-role communication and interaction? Has the move of management onto the floor improved communication with staff and has management improved their involvement in the operations? Has the introduction of co-located teams improved communication with both internal and external customers? Has the co-located team implementation been successful in breaking down the “us and them” barriers that existed prior to the restructure? Has the change to direct communication with customers improved the service offered by the department? Has the direct customer access created an environment for live resolution of problems making use of the problem solving decision tree method? Has the direct access by customers reduced customer frustration?

In terms of quality of work: Have the co-located teams brought about an improvement in the quality of work output in the department? Has the quality of problem solving improved as a result of the formalising of the problem solving procedure and direct access by the customer? Has role clarity improved since the restructuring process and the implementation of quality assurance? Have the changes in reporting lines achieved role alignment? With the implementation of quality assurance in the newly restructured department, has the quality of work and the performance of staff improved? Have technological advancements in the department contributed to improving the overall service offered by the department?

In terms of non-conformance: What impact has the reward structure had on the performance of staff? Has the performance management process improved the overall quality of work and staff performance in the department? Has the department succeeded in improving the transport

contractors' performance? Has the formalised reporting procedure improved the performance of the contractors? An additional question can be added with regard to the success of the scheduling department restructure in a global setting, namely: Has the restructuring of the scheduling department been a success if the new operation is compared to scheduling department operations globally?

As previously mentioned, the future sustainability of the scheduling department hangs in the balance and will, ultimately, be determined by whether management has been successful in their endeavour to improve service delivery through the restructuring of the department. Furthermore, the nature and size of the restructure may negatively influence motivation and performance of staff as a result of the significant changes made to the department and this, in turn, may negatively influence the outcome of the restructure. When looking at the relationship between the restructure and the motivation and performance of staff, it can be hypothesised that future sustainability of the department will be determined by both. The influence of both restructure success and staff motivation and performance levels, in determining the level of sustainability of the department, can best be described using a causal loop diagram. Figure 1.8 below depicts the inter-relationship between re-structure success, motivation and performance levels and department sustainability, posing a significant problem to be defined and researched.

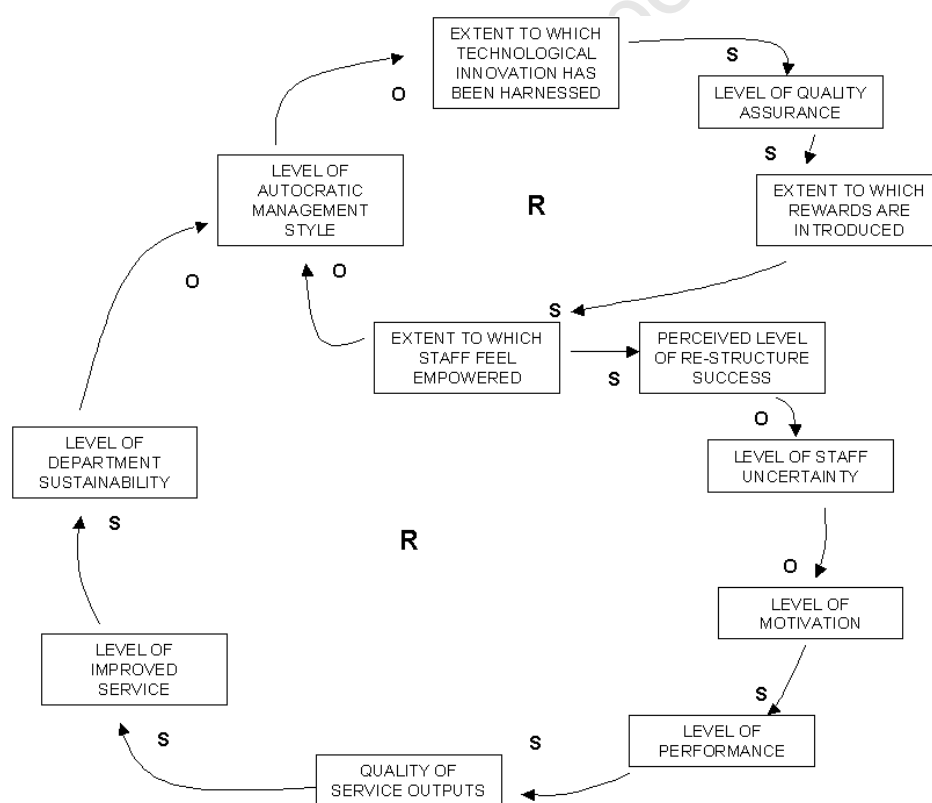


Figure 1.8 Causal loop diagram: Department restructure dilemma

When analysing the relationships depicted in the causal loop diagram in Figure 1.8 above, a significant problem emerges that calls for urgent research. As previously mentioned, the scheduling management team embarked on a major department restructure with the purpose of improving the

service delivery, or service outputs, of the department in order to ensure the future sustainability of the department. However, people affected by change of any nature will respond to that change, based on their perception of the change and its impact on the individual person. Therefore, a change as significant as the restructure of the scheduling department, as defined by the change in management style, the introduction of technological advancements, quality assurance and rewards, determines the extent to which staff feel empowered in their roles. This in turn determines the staff's perception of the success of the restructure. There may be levels of anxiety regarding the redundancies that came about as a result of the change, or insecurity about the changes in job tasks associated with the changes embarked upon. This level of uncertainty and anxiety may, in turn, lead to a decrease in the motivation levels of staff that may decrease the level of individual performance. A reduction in staff performance levels in individual roles will almost certainly decrease the level of department outputs, leading to a reduction in the level of service delivery of the collective team. Finally, the down turn in service delivery may force management to disestablish the department. Therefore, one can hypothesise that, in order for the management team to guarantee the long-term sustainability of the scheduling department, they must ensure that the restructure delivers the required level of service. This can only be achieved, through improved role interaction and by protecting the staff motivation and performance levels, both during and beyond the restructuring process.

Further questions can be posed regarding the level of success of the department restructure: Has management succeeded in maintaining staff motivation and performance levels through the department restructure that will ensure improvements in service delivery and, hence, secure department sustainability into the future? Is there an answer to maintaining staff levels during a restructure of this nature? The problem identified through this explanation, as well as the many unanswered questions raised regarding the level of success of the department co-location restructure, give rise to an urgent concern that must be addressed through this research process, namely: *Failure by management to (a) improve the service delivery of the department, through the physical restructuring of roles into co-located teams and procedures, and (b) maintain staff motivation and performance levels during the restructure, will result in the restructuring project being a costly waste of time and will threaten the future sustainability of the department.*

The above-mentioned concern is a serious one, because global pressure to improve customer service and ensure department sustainability into the future in all operating companies throughout the world requires department changes of this magnitude and nature to be successful from the outset. Therefore, in order to satisfactorily address this concern, a research question is posed that must be answered through this research process, namely: *How can the service delivery of a department be improved, if at all, as a consequence of physically restructuring the department roles into co-located teams and team procedures while maintaining the department's staff motivation and performance levels, thereby ensuring department sustainability into the future?*

Based upon the research question posed above, this research process will attempt firstly to determine the level of success of the scheduling department restructure in bringing about the desired improvements in service delivery; secondly to formulate a “recipe” for maintaining staff motivation and performance levels during the restructuring process and, finally, to describe the change management approach taken by management to maintain staff motivation and performance levels.

1.4 Conclusion

In this section, the co-location restructure of the scheduling department has been described in detail. The force field analysis in Figure 1.2 defined the restraining forces that prevented the department from offering a high level of service. The causal loop depicted in Figure 1.3 clearly defined the interrelationships that contribute to the poor service delivery by the department. An understanding of these interrelationships which contributed to poor service, allowed for the identification of three key focus areas during the restructuring process, namely physical structure changes, quality of work and non-conformance. These three focus areas were underpinned by one central theme- the focus on improvement in the interaction of roles within the department.

A comparison between the original floor layout and the newly structured cluster team co-location floor plan, successfully defined the extent of the physical changes that were made in an attempt to bring about an improvement in service delivery. Interaction of roles was addressed through the alignment of the roles to the new floor structure and the formation of cluster teams that contribute directly to the level of interaction between the three main roles within the department. Key to the role interaction improvements was the change from the indirect access of the customer via the customer service centre, to one of direct interaction with the delivery controllers in the department. A comparison, through the use of flow chart diagrams Figures A.4 and A.5 of Appendix A, clearly depicts the differences between the two communication channels with the customer and, in so doing, highlights the possible improvements made through this change. Quality assurance and role alignment are described and form another key element to restructure success, a focus that is designed to bring about improvements in the quality of work and, hence, improved service delivery. Management focus on non-conformance, both within the department and externally, with particular focus on contractor performance, is a significant contributor to improving service delivery and has, thus, been described in detail.

The researcher’s concern (stated above) regarding the consequences of management failing to improve the service delivery of the department, emphasises the importance of restructure success and the maintaining of staff motivation and performance levels in ensuring department sustainability into the future. The research question has also been defined and stated, based on the concern raised, as well as the numerous unanswered questions. An investigative research process will be followed to determine the success of co-location restructuring and the requirements for maintaining staff motivation and performance levels through department restructure. In the section to follow, the

research methodology is described, detailing the research process followed by the researcher in order to attempt to answer the fundamental question posed.

University of Cape Town

PART II

RESEARCH METHODOLOGY

CHAPTER 2 – THE RESEARCH APPROACH

2.1 Introduction

In the previous section, the restructure of the scheduling department has been discussed in detail in order to gain a clear understanding of the central research topic. The concern has been identified and the research question that must be answered through this research paper has been stated. In this section, the research cycle is described in detail and provides details of how the researcher has approached the research process in an attempt to address the problem situation and answer the research question posed. Therefore, in order to determine the level of restructure success, and define a recipe for maintaining staff motivation and performance during restructuring, the researcher must embark on a rigorous research process that involves a repetitive acting and reviewing cycle. The main stages of action research forms a solid foundation for this purpose and is discussed in detail. Furthermore, the researcher applied social research methods, interviewing the staff of the scheduling department and applying social research methods of data interpretation, in order to ensure accurate interpretation of the data. The researcher achieved this through the application of the 5 approaches to data interpretation, namely condensation, categorisation, narrative, interpretation and ad hoc, as proposed by Neuman (2000).

The definition of the main stages of action research defines this research process as an action research and learning process. The research process is identified by the researcher as a cone of ongoing research and learning, depicting the cycles of learning that has taken place since the start of the process. By combining the action research stages with the cycle of ongoing research and learning in this chapter, a hexagonal process, termed the research process hexagon, emerges clearly and collectively defines the key research elements that constitute the researcher's approach to this study.

2.2 Action research and action learning (ARAL)

The research process undertaken by the researcher will require extensive data gathering and interpretation that will give rise to learning. As stated previously (in Chapter 1 of this thesis) the researcher will need to address the research question posed through the research process which, in turn, will require him to gain knowledge and understanding of the level of success of the restructure. The outcome of the data gathering and interpretation of the data process will also lead to action or may even lead to further research. Furthermore, the research process involves feedback from other people, by way of structured interviews and surveys, from which conclusions, actions or solutions

will be drawn. This research approach is an action research and learning process centred on addressing the problem situation by answering the fundamental question posed. Figure 2.2 below defines the main stages of action research.

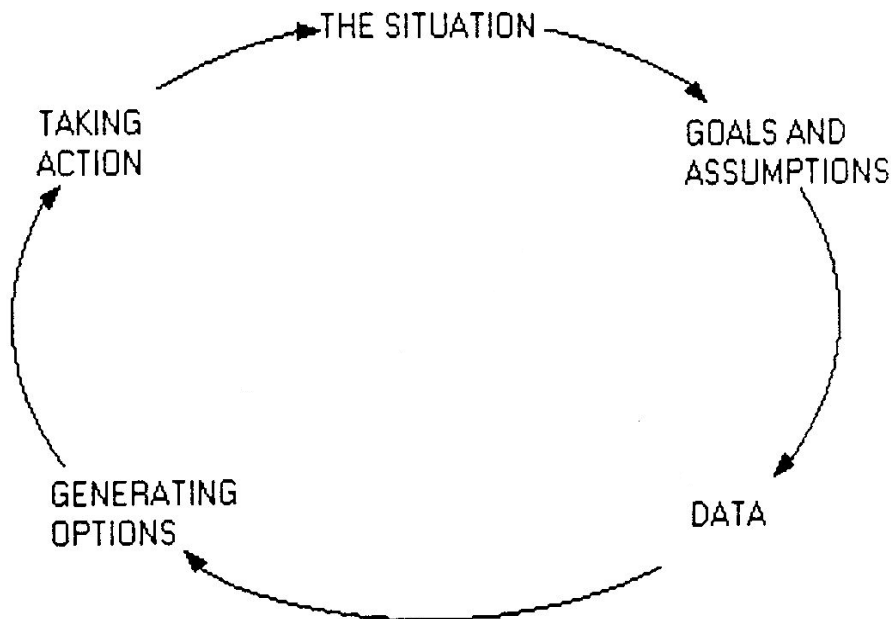


Figure 2.1 The Main stages of action research (Dick, B. [Online]: <http://www.scu.edu.au/schools/gcm/ar/ari/p-ywadsworth98.html>)

The research process undertaken by the researcher in this study is compared with the main stages of action research. The situation is the defined problem situation that exists and which is highlighted by the concern raised. The goals and assumptions are defined by the detailed description of the restructuring process that took place. The data stage is defined by the various data gathering techniques applied by the researcher in this study: namely structured interviews, surveys, participant observation, graphed data analysis and critical incident logs. Importantly, the involvement of staff and customers as sources of data ensures a group perspective of the outcome or success of the restructure. The options generated are defined by the research outcome, based on the data gathered, and, thereby, answering the research question. The hypothesis of restructure (defined in detail in Chapter 8) is derived from the options and the learnings taken, as well as the research outcomes learnt from the restructure. As previously mentioned, this theory forms a recipe for taking action, thereby concluding the action research cycle.

Ryan (2002) describes the action research cycle as ongoing and after the first cycle is completed a change has taken place, or an improved situation has been realised. This changed or improved situation may then be the focus for further research. From this explanation it is clear that action research is a process that, once concluded, may lead to a requirement for further research. In the case of the research process undertaken in this study, when answering the research question

posed, the researcher will inevitably be setting the tone for further research. The process of determining the success of the restructure and, hence, the success of both the co-location changes, and the theory of restructure, may, in fact, lead to further re-structuring of this nature which, in turn, might result in further learning and research. In the section that follows, the “cone” cycle of ongoing research and learning is depicted as a continuous process, describing the researcher’s ‘learning journey’ through action research. The cone focuses on further research when each “spiral” of the cone of learning is completed, thereby, bearing close similarities to the action research cycle described above.

2.3 Understanding the research cycle

The cone cycle of on-going research and learning is depicted in Figure 2.2 below. The cone cycle of on-going research and learning is a schematic representation of how the researcher embarked on the research process, from the implementation of the physical department re-structuring to the determining of the success of the restructure through this study.

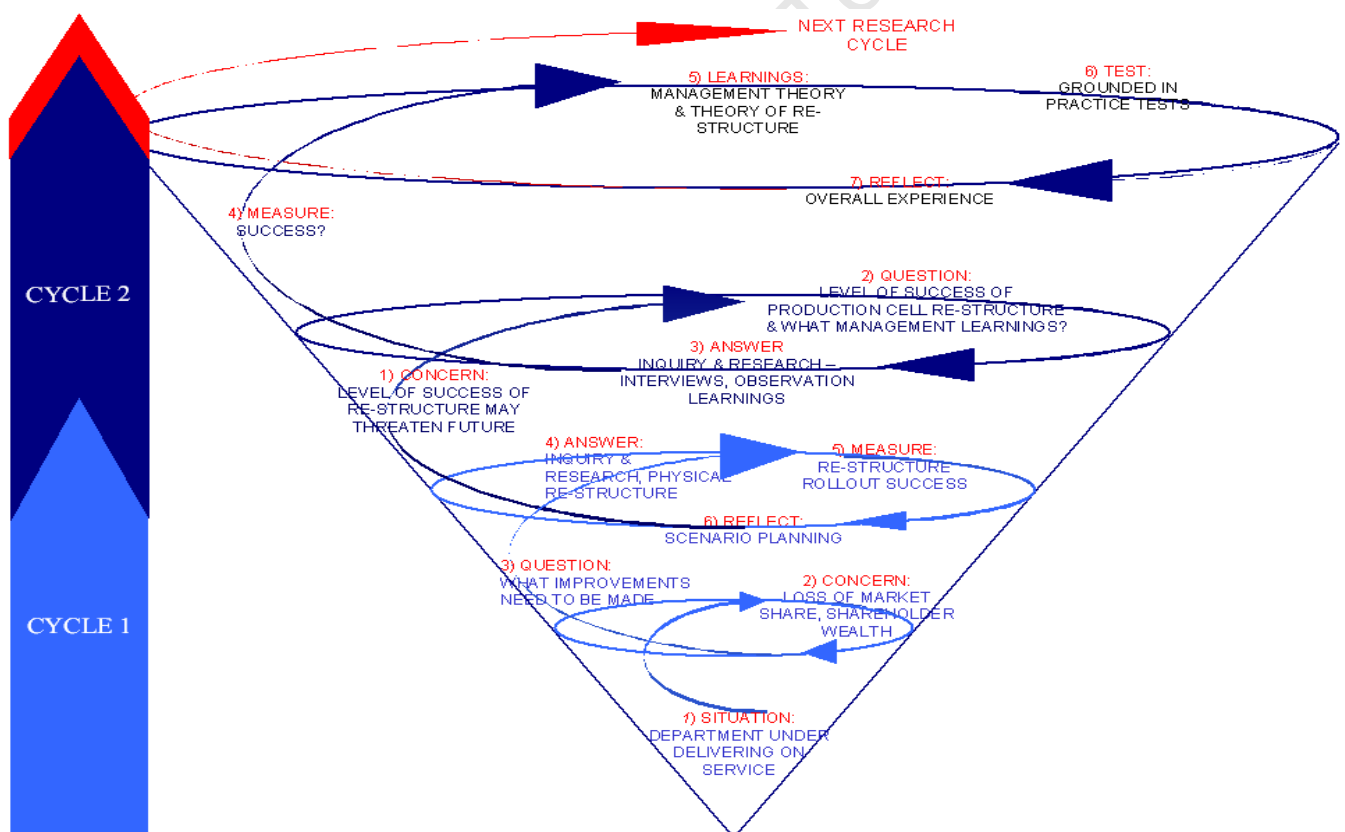


Figure 2.2 Cone cycle of on-going research and learning

This model of research proposes that the research process is cyclical and on going, moving through various stages of discovery for an undefined and indefinite period. The model proposes that there is a starting point for any research process at which stage the researcher has no prior knowledge or understanding of the subject being researched. A certain situation or state begins the research process, defining a concern or problem that exists and which must be addressed immediately.

Once the situation and concern have been defined, the research process begins and, as it progresses, so too does the knowledge gained by the researcher. Knowledge gained spurs the research process forward and, as the research progresses; the process becomes more detailed “coning outwards” and spiralling upwards. As the cycle continues, completed research initially forms the foundation for research to follow, and so on. Thus, learning broadens and gives depth and detail to the on-going research journey. In the research process undertaken for the scheduling department re-structure, the researcher approached the initial concern (namely department under-delivery on service) by defining the department’s key problem areas and by implementing a full project plan designed to initiate the re-structure and effect the identified improvements. This initial research cycle, cycle 1, forms the basis of the research “cone” process which defines the re-structuring process, while cycle 2 describes the research process used to determine the re-structure success, that may, in turn, lead to a future research cycle.

The “cone cycle” of research of the scheduling department begins with the defining of a problem and ultimately results in the discovery of the level of re-structure success achieved and the defining of a theory of re-structure. The research journey begins at the base of the cone, the beginning of cycle 1, where the department is identified as under delivering on service to the bulk fuel customers. The situation and concern are identified, and the need to begin a full research process is defined, in order to identify and action the structural changes required to effect improvements in the department. The necessary improvements are demarcated, leading to the implementation of the full restructure that, in turn, leads to the determining of the success of the actual restructure against project milestones. From the restructure, a scenario planning exercise was concluded to determine whether the department would succeed into the future. This concludes research cycle 1 and leads into the research study defined by cycle 2. A detailed research process, involving critical incident reporting through participative observation, structured interviews, quantitative analysis of graph results and a comparison of the South African scheduling department with that of the United Kingdom, leads to the determination of the level of success of the re-structure, based on the manufacturing cell restructure. From the learnings gained by the researcher through the restructuring and research process, hypothesis of restructure, thus concluding cycle 2 and beginning the next research cycle, not yet defined.

In the section to follow, the cone cycle of on-going research and learning and the main stages of action research are combined to form a collective action research process, a method that most closely defines the research process followed by the researcher in this study.

2.4 Combining the research elements

By combining all the research elements, as depicted by the “cone” cycle of research and learning, and the stages of action research, the research process hexagon, which embodies all the elements of this research process, is defined. The research process hexagon is depicted in Figure 2.3 below,

and forms a perfectly symmetrical model detailing the research process that is followed through this research paper. The fundamental question forms the core of the hexagon and hence defines the starting point for research.

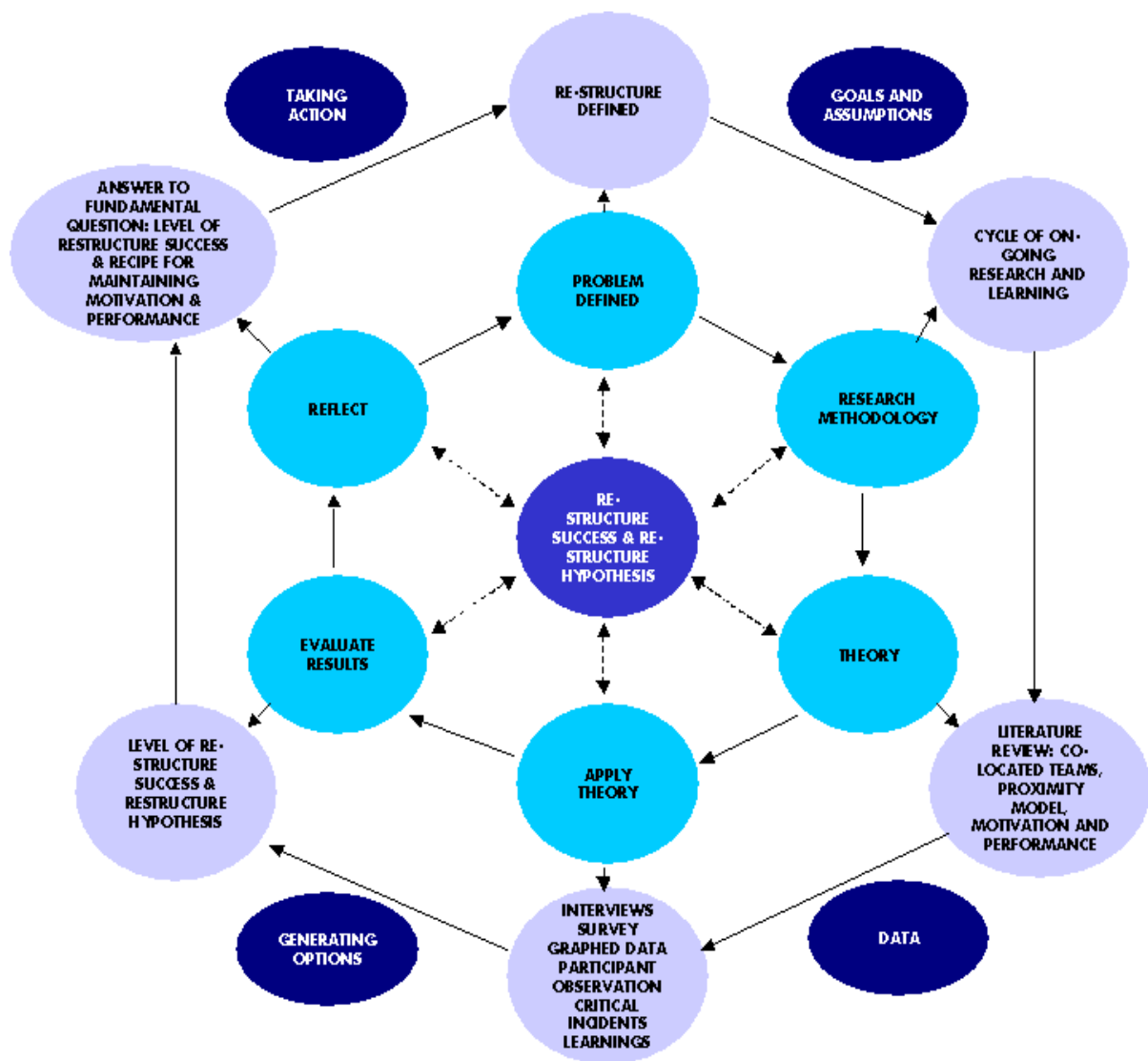


Figure 2.3 Research process hexagon

The next level cycle, as denoted by the turquoise spheres, defines the parts of the research process as detailed in this research paper. As the research process progresses, moving from the defined problem, to research methodology, theory, application of theory, evaluation of results and reflection, there is constant reference back to the original research question. Therefore, through every step in the process, the question is being addressed, from which answers will emerge and conclusions made. The relationship between the research question or core of the hexagon and the next level research cycle is thus denoted by broken two-way arrows.

The next level cycle, which is denoted by the grey spheres in Figure 2.3, branches out from the core and the first level research cycle and defines and describes the elements (models, data gathering techniques and outcomes) within each research step. The restructuring of the department defines the problem, the cycle of on-going research and learning forms the basis of the research

methodology, while the literature view provides the theoretical content to the research process. Conducting interviews, surveys and other forms of data gathering methods, define the application of theory; the success of the restructure, and the restructure hypothesis, defines the research outcome and the answers to the research question posed, thereby, defining the reflection stage, which concludes the research process.

The action research and learning steps govern the entire research process as denoted by the navy blue spheres in Figure 2.3. Goals and assumptions are derived through the defining of the problem and the description of the restructure. Data is gathered through the various data gathering techniques applied by the researcher, options are generated through the formulation of a hypothesis of restructure and action is taken through reflection and the answering of the research question.

2.5 Social research methodology

The researcher approached the data gathering, and analysis and interpretation thereof, by means of social research. In his book 'Social research methods', Neuman (2000) provides a clear definition of social research and social research methods of data gathering and interpretation of data. Neuman's (2000) explanation of social research places the research methods conducted in this study, into perspective as social research. According to Neuman (2000), social research is research conducted by people in order to discover new knowledge and to gain a richer understanding of the social world. Neuman (2000) maintains that social researchers become enriched when they begin to create a personal link between themselves and the research process. Similarly, Mills (1959) advises social researchers to combine life experiences with intellectual work, and to conduct research through continual examination and interpretation thereof.

The researcher of this study adopts social research methodologies which include ethnography which is discussed in Section 3.2. The research undertaken in the scheduling department was a social setting in which the researcher worked and conducted his research. The primary data gathering technique used to gather data for analysis and interpretation was structured interviews (described in detail in Chapter 6), a key data gathering technique used in social research. Neuman (2000) provides researchers with six steps for analysing interview data during social research. The first step is when the interviewee describes his/her lived world in the interview, what they experience, feel and so in relation to a topic. The next step takes place when the interviewee discovers relationships and new meanings during the interview. In this case, the interviewee begins to see new connections in their life experiences in relation to the interview topic. The third step to analysis begins when the interviewer clarifies the meanings described by the interviewee through repetition or rephrasing in order to ensure full understanding of the interviewee's responses. The fourth step takes place when the interviewer begins interpretation of the answers after the interview, either on his/her own or with other researchers. In order to ensure accurate interpretation of the data, Neuman (2000) proposes five approaches to the analysis of meaning, namely: condensation,

categorization, narrative structuring, interpretation and ad hoc methods. The sixth and final step proposed by Neuman (2000) is to action based on new insights. In this step the researcher will act from new insights that he/she has gained through the interview process.

The researcher conducting research on the scheduling department restructure applied Neuman's (2000) six analysis steps in social research. The interview questions were designed in order to draw out the interviewee's experience of his/her social environment. As a result, the interview transcripts were rich in their lived world descriptions and rich with new meanings and new connections made by the interviewees. In order to ensure full understanding of the interviewee's interpretations, the interviewer made use of re-emphasising and rephrasing of questions. After the interviews were conducted with the staff, the researcher began the interpretation process, making use of the five approaches to analysis. In the final stage, and after interpretation of the data, the researcher identified actions that were required in order to bring about further change improvements in the department, thereby defining the end of this research cycle and the start of the next, as described in the cycle of on-going research and learning (Figure 2.2 above).

The five approaches to data interpretation as proposed by Neuman (2000), namely, condensation, categorisation, narrative, interpretation, and ad hoc were applied by the researcher (described in detail in Chapter 7) in analysis of the interview transcripts derived from the interviews. Neuman (2000) describes meaning condensation as the process by which the researcher sorts and groups the various meanings into a more condensed formulation for analysis purposes. The researcher made use of categorisation of the interview transcripts in order to assist this process. Categorisation, as described by Neuman (2002), is the process of coding the transcripts into meaningful categories. In this case the researcher coded the transcripts based on comments in support of or against the various service improvement indicators. Narrative structuring entails the determining of plots in the transcripts, determining the meaning behind the stories told by the interviewees. Furthermore, Neuman (2000) describes ad hoc methods as a variety of common sense approaches to the interview text.

In conclusion, social research is a research approach adopted by the researcher in order to satisfactorily answer the research question posed and has therefore been central to the research process undertaken in this study.

2.6 Conclusion

In this section the research process undertaken by the researcher has been compared to the main stages of action research and learning. This comparison has defined the research process as an action research and learning process. The researcher has applied social research methods through the analysis and interpretation of the data gathered through the interview process undertaken. Furthermore, the cone cycle of on-going research and learning has been described in detail and is a

schematic representation of how the researcher perceives his research journey. The description of the cone cycle confirms that the research journey involves a cycle of increased learning because each research cycle builds and gives rise to another. By combining the cone cycle of on-going research and learning with the steps defined in action research, a symmetrical hexagonal research process is derived, clearly describing and defining the research process undertaken by the researcher in this study. With reference to the problem situation described earlier, defining of the research process hexagon is pivotal in answering the research question posed because it provides the researcher with a logical and concise research journey through which to uncover the answers required. Through constant reference back to the original problem statement and research question at every point in the research process, the researcher will ensure that the research process effectively and comprehensively addresses the problem.

In the section to follow, the inquiry framework to research is described by defining the various data gathering techniques applied by the researcher, in order to gather the necessary data for research.

PART III

INQUIRY FRAMEWORK

CHAPTER 3 – DATA GATHERING TECHNIQUES USED

3.1 Introduction

In the previous section the researcher described his understanding of the research and learning process that he has undertaken in order to attempt to address the research question posed earlier. In this section the researcher defines the various data gathering techniques used to gather the required data and probes the perspective of other authors on the use of the various techniques. The data gathering techniques, selected by the researcher in order to gather data for determining restructure success, are structured interviews, ordinal survey, graphed data analysis. Participant observation and critical incident logging forms the data source for the hypothesis of restructure described in detail in Chapter 7. The researcher describes the use of each data gathering technique, as defined by other authors, in order to understand the correct application of each, so as to ensure that quality data is gathered for analysis.

3.2 Data gathering approach

The researcher makes use of both qualitative and quantitative data gathering techniques for the purpose of enhancing the richness of data analysis. In their book “An expanded Sourcebook: Qualitative Data Analysis”, Miles & Huberman (1994) promote the use of both qualitative and quantitative data gathering techniques in research. They propose that using both qualitative and quantitative gathering techniques in research enables the researcher to corroborate data collected via both methods against each other. It also develops analysis by providing richer detail to the research process and enhances research through the highlighting of surprises and paradoxes in the data. By looking at the definition of qualitative and quantitative data gathering, the researcher has been able to select the techniques that he feels will provide the best data set (both quantitative and qualitative) for analysis. Thomas (2003) provides a good definition for qualitative versus quantitative data. He proposes that the difference between the two is that qualitative methods define outcomes based on the characteristics of people and events, while quantitative methods define outcomes in terms of measurements and amounts. Miles and Huberman (1994) define qualitative versus quantitative researchers as follows: a qualitative researcher usually works with samples of people, carrying out an indepth analysis of them in their particular context; quantitative researchers analyse data in order to seek statistical significance, examining data trends rather than people in context.

Based on these descriptions, the data gathering techniques used by the researcher in the context of qualitative and quantitative definitions are as follows:

- Structured Interviews – qualitative and quantitative

- Ordinal Surveys – qualitative and quantitative
- Graphed Statistics – quantitative
- Participant Observations (critical incidents and observations) – qualitative
- Global Setting Comparisons – quantitative.

Structured interviews of the staff within the department will be conducted in order to produce qualitative results in the form of interview transcripts. The interviews conducted, however, were also quantitative in nature. While, the interview transcripts will be analysed without measurement or amount comparisons, the interviewees will be asked to rate each area of the focus or service improvement indicator (defined in Chapter 5) against a rating scale, that will be graphed to provide trend data. An ordinal survey will be conducted with company sales representatives in order to gather 'customer perspective' data and, while this will also be of a qualitative nature, the feedback will be presented graphically and quantitatively.

Graphed statistical data gathered from within the department constitutes quantitative data gathered. The researcher will make clear data comparisons between this quantitative data and the interview transcripts, from which conclusions can be drawn. A large portion of the data was gathered and presented graphically consequently, the researcher will need to ensure correct interpretation. Participant observations will be logged in the form of critical incidents and a quantitative comparison made between the scheduling department in South Africa and the scheduling department in the United Kingdom.

The interviews will be conducted in such a manner as to draw out people's interpretations of the level of success of the restructure, the staff's personal experiences and observations of the restructure and their perceived level of success against the defined service improvement indicators. The questions (described in detail in Chapter 6 section 6.2.2) are posed in such a way as to enforce a comparison by the staff between the situation in the scheduling department after the restructure and their historical knowledge of how it used to be prior to the re-structure. Qualitative data gathering draws out actual events as they happened and, thus, will be valuable in this research process in which the researcher is trying to find evidence of restructure success, that is, evidence that there has been an improvement when comparing the current state to the historical state prior to re-structure. Therefore, through the implementation of structured interviews with the staff of the scheduling department, which will focus on various areas of change, the researcher hopes to draw out 'real life' in terms of the restructure and, in so doing, discover what people have experienced and what their views are regarding the level of success. Thomas (2003) describes various qualitative perspectives that are used in qualitative data gathering that have direct bearing on the qualitative research conducted in this paper. The first one is the historical perspective in which the author is interested in the causes of events, or why things happen. He purports that this perspective is threatened by incomplete historical accounts. The historical perspective will effectively be captured through the structured interviews conducted by the researcher, as questions will encourage

discussion of the department before the restructure. They should be able to accurately capture the staff's value judgements when they comment on issues prior to the re-structure. The interviews will focus on comparisons of the past and present scenarios and rely on the staff's perceptions of the department prior to the restructure and will, thus, have what Thomas (2003) terms 'an evaluative history' focus. The next qualitative perspective described by Thomas (2003) is the present day perspective and he describes this research perspective in terms of ethnography. He explains that an ethnographer is a person who observes others while they are going about their various activities in the organisation.

Ethnography, in the case of this research process, can be seen to be highly advantageous because the researcher conducting this research also manages the scheduling department under review and has been able to be a participant observer throughout the restructuring process. The research process followed by the researcher is, therefore, unique in the sense that the researcher is not an outsider attempting to research a topic about which he may not be fully knowledgeable. On the contrary, in this case the research process has been dramatically enhanced as a result of the fact that the researcher, the scheduling manager, is experiencing the subject material daily and is fully knowledgeable of the subject matter, a significant advantage for ethnographic research. This situation, however, also poses a significant challenge in that the researcher needs to ensure that personal perception does not skew research results by allowing bias towards restructure success to occur throughout the research process. Thomas (2003) highlights the advantages of ethnographic research as having the ability to bring to light the internal operations of a group by focussing on interactions among individuals. This method exposes the internal operations of a group, a key factor in determining the success of the scheduling department restructure. The advantage of using ethnography is key in the case of the research to be conducted on the scheduling department restructure. This is because the researcher will need to unpack and understand communication channels and their influence on different roles, in order to determine whether there has, in fact, been an improvement from the past to the present situation as a result of the restructure.

The difference between quantitative and qualitative data gathering methods for research has been discussed in detail and the methods used in this research paper have been defined earlier in this chapter. It is important now to describe how each method of data gathering will be designed and used and also to define the advantages and disadvantages of each from a theoretical standpoint. This will ensure that the implementation of the various methods is as accurate as possible.

3.3 Structured interviews

Thomas (2003:66) describes the limitations of structured interviews as time consuming due to the one on one interaction required with each interviewee and time is lost through discussions that may not necessarily be associated with the subject being discussed, or responses may be inaccurate if the questions touch on matters of a personal nature.

These limitations of structured interviews will be a reality in terms of the interviewing process to be conducted throughout this research. The interviews to be conducted will require the scheduling department staff to talk about change, something that affects most individuals on a personal level and is often seen by most people in a negative light. However, the researcher is confident that trustworthy information will be gathered as the interviewees to be interviewed have all been actively involved in the department restructure and have experienced the changes that were made.

The researcher makes use of the interview process and design as described by Kvale (1996) as the theoretical basis for designing the interviews to be conducted with the staff of the scheduling department. The reason for this is that Kvale (1996) clearly defines a procedure for making interview conversations accessible to analysis and the associated problems. Among the various methods of recording interviews, Kvale (1996) states that audiotaping is advantageous as the conversation can be re-played improving interpretation accuracy. Based on this, the interviews to be conducted for this research process will be recorded. Due to the detail of the restructuring process and questions posed, the researcher will need a reliable source for reference. The taking of notes and remembering responses, therefore, will not be an option and the recordings will need to be converted to transcripts for analysis. Kvale (1996) appears, however, to have reservations about this process stating that transcript pose methodical and theoretical problems that are open to judgement by the researcher, as visual information as well as the social atmosphere and personal interaction is to a large extent lost in audiotape recordings.

Kvale (1996) has found that transcript reliability can be a problem because two separate transcribers may use different words. The researcher will, therefore, need to ensure that, as far as possible, reliability of the transcripts is not undermined through the use of different words. The transcripts should, as far as possible, reflect word for word what is said in the interview. In order to mitigate this problem, the researcher will be conducting and transcribing the interviews himself.

Kvale (1996) emphasises that transcripts are interpretations or perceptions of some original reality. Based on this, the interview transcripts from the staff of the scheduling department will be perceptions of the level of success of the restructure. This reiterates the importance of comparing these results with quantitative results in order to ensure correct interpretation. The researcher will apply codes to the transcripts in order to make sorting of data easier and to ensure the evaluation of the transcripts is aligned to the various areas of focus for determining restructure success.

Kvale (1996) stresses the importance of first defining how the data that is gathered from the interviews is to be analysed. The method of analysis will determine how the researcher defines his/her interview process and the transcription process. Kvale (1996) proposes six approaches to analysis, one of which involves categorising the results through the use of coding into predefined categories. Through the coding of transcripts, the researcher can highlight phenomenon and draw

conclusions on large amounts of text more effectively. Due to the nature of the scheduling department restructure, plus the fact that determining the success of the restructure will involve focussing on many key areas (as described in detail in Chapter 5), categorising the interviews and aligning them to the key service improvement indicators, will be essential for ensuring the accurate interpretation of the data gathered through structured interviews. The interview questions will be defined by category and this will encourage the interviewee to compare the performance of the newly restructured department with that of the past in order to determine whether there has been an improvement in each category. After a particular question has been posed, the interviewee will be asked to rate the category aligned to the answer that he/she has given, according to the rating scale for each category. The rating of the category will determine whether the interviewee's view of a particular category is either positive or negative. These statistics can then be presented graphically in support of the interpretation of the transcript information gathered. (Chapter 6, section 6.2.2 provides details on how the interviews were conducted using categorisation.)

3.4 Surveys

In order to effectively research the success of the restructure, it is important for the researcher to seek opinions from individuals outside the scheduling department. A customer perspective of the level of improvement in service delivery through restructuring is essential. However, the company's customer base poses a problem in that it is very large and conducting a survey with customers would require an equally large sample set. Furthermore, the company requests customers to complete a 'sensing survey' on a quarterly basis, making it impossible to add another survey to the list. Another external customer of the scheduling department is the field sales force or sales representatives. The field sales force also contact the scheduling department on behalf of customers and because they are 'customer facing' or on the 'coal face' with customers, they have knowledge of how customers view the scheduling department. For this reason, the researcher will target a sample set of field sales force members when conducting the external survey for this research paper.

As stated earlier in this chapter, the results of the survey will be both qualitative and quantitative and will define the current status perspective as described by Thomas (2003). Thomas (2003) describes surveys as an information-gathering tool used to determine the current situation of a specific group characteristic, the result of which is presented quantitatively. An ordinal response survey will be conducted with a sample set of forty field sales force members. The survey sample set will range from sales managers to sales representatives in both the commercial and retail departments. Fink (1995) describes ordinal surveys as responses by individuals to a set of statements. The responses by the respondents are made on a scale ordered from positive to negative or very important to very unimportant. In the case of the scheduling department survey, a five point rating scale will be used against a set of statements (explained in more detail in Chapter 6, Section 6.2.2) that will be aligned to the service improvement indicators as defined in Chapter 5. A neutral response of 'undecided'

will also be included as this response gives the researcher the ability to test the field sales force's understanding of the statements. If a respondent's response to a statement is 'undecided', it is possible that the respondent may not fully understand the content of the statement, or has insufficient knowledge to respond to the statement.

Thomas (2003) highlights a key disadvantage to surveys when he points out that surveys report on averages, a fact that may prevent accurate interpretation of a key variable. Fortunately, Fink (1995) provides some useful insights on how an ordinal response survey should be set up in order to ensure effectiveness. Fink (1995) insists that questions must be precise and unambiguous and that questions containing two ideas must be avoided. This can be ensured by avoiding the word 'and'. Fink (1995) also goes on to advise that negative questions should be avoided. The questions posed by the researcher in the scheduling department ordinal response survey, therefore, will be 'punchy', to the point and contain a single idea. They will also be of a positive nature because this will make the scoring of the results easier. Fink (1995) recommends the use of closed questions that produce standardised data that can be analysed statistically because statistical analysis is essential in making sense of survey data for groups of people. Hence, the survey contains closed statements in the sense that the respondents will be given specific statements and pre-selected responses on the scale ranging from strongly agree to strongly disagree.

3.5 Graphed data analysis

This study makes extensive use of graphs to evaluate the level of success of the Scheduling Department restructure. However, in order to accurately interpret graphs, the data being graphed must be represented correctly so as not to lead to misinterpretation. A researcher who is gathering, interpreting and then analysing research data must ensure understanding of the pitfalls of incorrect graphed data interpretation. *'Although time series graphs are powerful devices for conveying a large amount of information, they can also be used to distort data and to create a misleading picture,'* (Parkin, 1990:31). To achieve the correct representation of graphed data it is imperative to ensure that the scale on the Y-axis is the same across all the graphs that are being analysed together. By compressing the Y-axis scale on one graph, as opposed to a graph with the same data, a researcher can mislead the interpreter of the data being graphed.

A further pitfall to graphed data interpretation is the omission of the zero or origin on the axis. Parkin (1990:33) argues that while *'sometimes omitting the origin is precisely the correct thing to do as it enables the graph to reveal its information, there are also times when omitting the origin is misleading.'* By omitting the zero from the Y-axis, the researcher can manipulate the perceived impact of the data being presented. Peaks and valleys in the data will appear more acute with the omission of the zero. There are also benefits to presenting data in this way and the researcher will need to decide on how best to represent the data so as not to mislead the analysis thereof. Whatever decision is taken by the researcher in terms of how the data should be represented, the

graphs' ability to represent trends is all-important. A trend is defined by Parkin (1990:30) as 'a general tendency for a variable to rise or fall.'

Therefore, key to accurate graphed data interpretation, is the representation of the data on the same scale across graphs that are being compared. Furthermore, it is imperative that the researcher determines how best to represent the data by selecting the correct Y-scale, and through the decision on whether to omit the zero on the Y-axis. This will ensure good data interpretation and accurate analysis of the data being presented.

3.6 Participant observation

Participant observation by the researcher throughout the research process is a critical input into answering the fundamental question. The researcher combines the data gathering techniques of interviews, surveys and graphs with participant observation in order to provide personal input into the restructure. Participant observation will take two forms, namely through the recording of critical incidents and the documenting of observations conducted in the United Kingdom, in an attempt to provide a comparative analysis between the SA Scheduling Department and UK Scheduling Department. The critical incidents that are logged by the researcher will be used to develop a hypothesis of restructure based on the restructure experiences gained (described in detail in Part V, Chapter 8), while the "global" comparison will attempt to determine the success of the restructure in a global setting.

3.6.1 Critical incidents

Critical incidents offer you the opportunity to analyse and learn from an interaction which you would like to have handled better, or more easily, or more satisfyingly than you did. The critical incidents recorded by the researcher during the restructure are detailed accounts of interactions that did not go according to plan. In 'negative' situations such as these, learning from the incident comes to the fore. The lessons learnt by the researcher will be documented and then translated through the use of a causal loop diagram providing the basis for the hypothesis of restructure which is described in detail in Chapter 8.

3.7 Conclusion

In conclusion, the data gathering techniques to be used during this research process have been introduced and have been placed in context in terms of qualitative and quantitative research methodology. The approach to research data collection will make use of both qualitative and quantitative methods in order to ensure richness of the data gathered. The theory will be applied in order to gather the necessary data for research and the evaluation of the data will then be carried out in order to address the fundamental question posed earlier. By researching the correct application of the various data gathering techniques by other authors, the researcher has gained valuable direction in terms of their application. Research of other author's findings has also

provided a perspective of the possible pitfalls to each data gathering technique, which is invaluable to the success of this research process. In the section to follow, the researcher continues his analysis of the literature by other authors through a detailed literature review of the perspectives of authors on the topic of co-location changes for the purposes of improvement and the relationship between staff motivation and staff performance in a team setting.

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PART IV

LITERATURE REVIEW

CHAPTER 4 – REVIEW OF CURRENT LITERATURE

4.1 Introduction

The researcher has embarked on a research process in order to address the problem situation facing the management team, namely the future sustainability of the scheduling department. The concern is addressed through the research process by satisfactorily answering the research question posed. In order to do so, the research process will determine, firstly the level of success achieved by management in implementing restructuring co-location changes to the scheduling department in an attempt to improve the service delivery of the department. Secondly, a hypothesis of restructure will be defined in order to provide a 'recipe' for maintaining staff motivation and performance levels during the change process in order to realise future department sustainability. Therefore, two key areas focussed upon during the research process, namely the co-locating of roles within the department and the relationship between staff motivation and staff performance and the possible impact of the motivation-performance cycle on the outcome of the change process – the scheduling department restructuring. It is therefore important to place the topics of co-location and team motivation and performance into perspective as a research topic by reviewing an account of what has been published on these two topics by accredited scholars and researchers.

Through the literature review, the researcher hopes to uncover what knowledge and ideas other scholars and researchers, have established on co-located work teams and team motivation and performance, in order to determine what strengths and weaknesses relate to these topics respectively. The researcher will embark on an information seeking exercise. Through critical appraisal of the literature found on the topics, the researcher will synthesise the results, identifying areas of controversy in the literature, and formulating questions that need further research. The literature found will be aligned to problem situation identified in this study in order to place this study in context of literature by accredited authors and scholars.

4.2 Co-location for improvement

By physically positioning the three roles in the scheduling department into co-located work teams, the scheduling manager is attempting to realise the proximity benefits of improved interaction and aligned processes and procedures in order to realise an overall improvement in the team's service delivery outputs, namely problem resolution and schedules.

When looking for literature on co-located teams for the purpose of improved outputs, the researcher only found literature in the context of the manufacturing or production environment. The literature

found was predominantly based on organisational change rather than change at a departmental level. In an article titled: 'Virtually co-located product design teams, sharing teaming experience after the event', Kulwant and Sharifi (2002) investigate the difference in performance of virtually co-located teams versus physically co-located teams. Sharifi and Kulwant (2002:656) define the co-location as: 'Co-location implies that functions contributing to the design and development of a new product or process are physically located close to each other'. In their research they state that there is a perception that teams with physical co-location, a shared focus and common goals will have improved outputs, but propose that virtual teams are becoming more popular as a result of improved communication technology. They explore the paradoxes of setting up both virtual and co-located teams through their research. Kulwant and Sharifi (2002) state that logically physical proximity automatically realises assumed benefits of increased interactions, easier communication and increases in efficiencies in a production environment. However, Rafi (1995) argues that in a physically co-located team gains are illusory and that the activities of physically co-located teams become inefficient over time.

Through a survey that they conducted with undisclosed firms, Kulwant and Sharifi (2002) identified some key benefits to physical co-location versus virtually co-located teams. Their survey revealed the following benefits of physically co-located teams:

- Face to face interactions by co-located roles resulted in improved trust amongst the individuals in the team, as co-location is more conducive to relationship building. The relationships and resultant trust then builds a collaborative effort;
- Production time reductions were realised as a result of physical co-location;
- Communication flow is enhanced as queries and problems can be addressed quicker through direct interaction amongst team members;
- Improved product quality by 80% of the firms who took part in the survey;
- Reduction in costs;
- Improved customer focus as less time was needed to resolve queries and problems within the team;
- Motivation is higher in physically co-located teams and more easily managed resulting in improved customer focus by management.

Conversely, the following drawbacks to physically co-located teams were identified:

- Delays from other departments as a result of efficiencies gained in physically co-located teams;
- Poor communication outside the team;
- Different educational and training backgrounds of the team members.

Through their research Kulwant and Sharifi (2002) emphasise that the performance of a co-located team is dependant upon trust, working relationships, integrity and common purpose. Therefore the dynamics of the team becomes very important. Furthermore, teaming requires a co-operation and collaboration between groups of individuals with differing experiences, preferences and collaboration

between groups of individuals with differing experiences, preferences and needs. When comparing the research findings of Kulwant and Sharifi (2002) with the co-location restructure of the scheduling department, it is clear that although the restructure has taken place, that the improvement in service delivery may not necessarily be realised. It can be said that the future sustainability of the scheduling department is deeply seated in the dynamics of the team and management's ability to create an environment of trust, relationship building and to constantly emphasise the common goals of the team.

Harris & Ogbonna (2003) researched an organisation that had restructured resulting in many novel attributes such as empowerment, community orientation and lack of hierarchy. They explore how this influenced the performance of the organisation. Through their research they maintain that there is a limited range of restructuring forms that organisations can implement and that those that do exist are largely very complex. Therefore the structural changes of small organisations operating in non-technological sectors have been relatively ignored. Based on this they maintain that finding the correct organisational structure that meets the needs of the business is one of the most problematic issues facing organisations and their managers today. Harris & Ogbonna (2003) maintain that there is very little empirical evidence linking innovative organisational structures to performance, however that there is indirect evidence to suggest this based on organisational successes that have been achieved in the past. In a case study that they conducted on the a company called the Zennith Group, in the UK, they ascertained that the key driving factor to success of organisational restructuring of the company, was the manager's leadership skills and managerial abilities. Through power of persuasion, the manager was able to commence with the company restructuring. Interestingly the management team of this company approached the restructure changes on a trial and error basis. Ultimately, the success of the restructure was based on: the director's ability to promote a new concept, acceptance from the majority of people in the organisation that change was required, the trust and belief held by senior management, the acceptance of the need for experimentation, and the use of internal marketing to promote the new structure. The underlying conclusion is that people focus is the key to successful change management. Harris and Ogbonna (2003) conclude that while organisational restructuring is inconclusive in bringing about improvements in organisational performance, they maintain that innovation through change should prove advantageous as it may break down barriers, old, tired and outdated processes within an organisation.

The old structure of the scheduling department was divided into three separate functional teams and this old state can be compared with the literature on cross functional teams versus functional teams, as described by Evans, et al (2007). The literature of other scholars supports cross-functional team structures as apposed to functional teams as a better model for performance. Evans, et al (2007) identifies the advantages of cross functional teams versus functional teams as follows:

- All relevant skills and information are simultaneously available to the client;

- Client interface is coordinated;
- The client doesn't have to go to multiple places to gather needed information;
- Decision making occurs at the client interface level;
- Response time to the client is faster.

While Nadler and Tushman (1997) insist that managers, who are designing organisation structures, must focus on workflow interdependencies, they state that individuals grouped according to the same discipline run the risk of becoming over specialised. Furthermore, Dimancescu (1992) proposes that teams that are non cross-functional will struggle to effect a good service to customers since they execute policy in isolation to one another. Brickley, et al (2003) identifies specific disadvantages to specialised task structures as follows:

- Loss of information between specialised groups;
- Increased costs due to having to establish more procedures between specialised groups;
- Functional short-sightedness due to individuals concentrating only on their individual goals;
- Reduced flexibility as a result of single tasking.

These contemporary researchers present compelling evidence in support of cross-functional structures.

Evans, et al (2007) state that functional organisations are still far more prevalent than cross-functional organisations and that research shows that most managers manage from a functional perspective. Furthermore, Evans, et al purport that certain scholars in the field of cross-functional organisations have cited improvements in performance including: superior customer service, faster cycle times, quicker decision making, and lower costs. Evans, et al (2007) conclude their research by defining 12 key strategies in order to create connected, cross-functional organisations, some of which are pertinent to the co-location restructuring of the scheduling department. One of the key strategies proposed is the design of structures around the customer. Another strategy proposed by Evans et al (2007) is to design team-orientated production systems whereby employees and managers produce and problem solve from a multi faceted perspective.

4.3 Manufacturing cell proximity model

As previously mentioned, the research conducted by accredited authors on the subject of co-location restructuring, organisational change for improvement performance, and reviewed by the researcher, is research carried out predominantly in a manufacturing setting. Description of the manufacturing cell concept reveals similarities with the advantages of co-located teams. In this section, the researcher reviews the literature of accredited scholars and researchers in an attempt to determine the advantages of the manufacturing cell concept. Due to the complexity of the manufacturing cell concept as a model for restructure, the researcher focuses exclusively on the manufacturing cell proximity model, a model aligned to co-located team structuring.

In order to understand the concept of the manufacturing cell proximity model in relation to the advantages of co-located teams as prescribed by Kulwant and Sharifi (2002) in the previous section, the proximity model can be compared with the concept 'system'. Scholtz (1998:21) provides a definition for 'system' as follows: 'A system is a whole composed of many parts; the systemic unit has a definable purpose; each part contributes to the system's purpose but no part by itself can achieve that purpose; we cannot understand a system by identifying each part of the entire unassembled collection of parts; looking at the interactions among the parts might help us understand how this system works; to understand a system we must understand its purpose; its interactions and its interdependencies.' Figure 4.1 below depicts a typical system with inputs and outputs. Ryan (2002:33) provides further information on the nature of a system: 'A system consists of a number of elements and the relationship between the elements. A system identified by a boundary will have inputs and outputs, which may be physical or abstract. The system does the work of transforming the inputs into outputs. A system so described is separated by its designated boundary from its environment. It is termed an open system if the boundary is permeable and allows inputs from and outputs to the environment.'

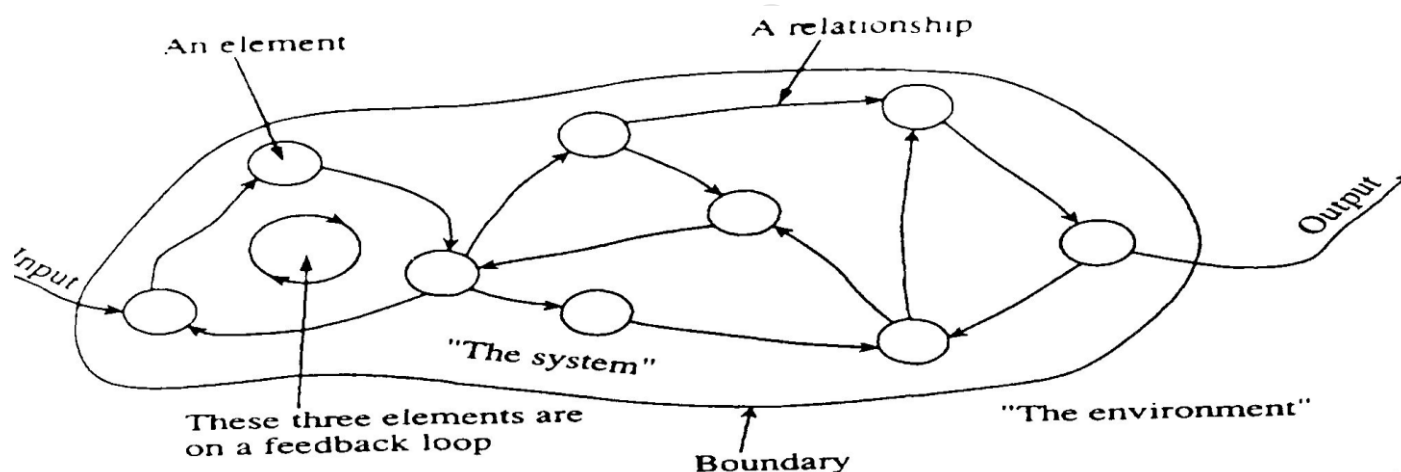


Figure 4.1 'System' Prof T Ryan – Diagram titled: General Conception of 'System', Study Notes, Pg. 33, 2002.

When comparing the concept 'system' with the manufacturing cell concept as described by Nyman (1992), the similarities are clear. The manufacturing cell is an industry term for a structural floor plan, consisting of a cell of workers specifically positioned according to their tasks and like processes contribution, so as to achieve increased performance on the assembly or production line, while reducing manufacturing costs. In his explanation of manufacturing cells, Lee R. Nyman (1992:2) states that 'the cell is a work group, with associated process equipment and tools to produce the goods and services of the focussed factory.' The manufacturing cell concept in turn is aligned to the co-location team definition, both designed to bring about interaction improvements amongst team members.

According to Nyman (1992) there are three types of cells: product cells, process cells and group technology cells. The three cell types are depicted in Figure B.1 of Appendix B. Nyman (1992:74) describes product cells as cells that produce finished product in a compact area and that product cells typically result in the greatest performance benefits as the team is able to eliminate nearly all non-value adding activities. Nyman (1992) depicts the three cell types in proximity diagram format, in Figure B.1 of Appendix B. A proximity diagram is a schematic representation of the relationships that are not material-flow related, and depicts the exact proximity between the various activities, as well as the level of importance of the relationships. Figure B.2 of Appendix B shows an example of a proximity diagram with the related closeness table. According to Nyman's description of the proximity model, the proximity between each activity is based on the specific requirements or relationship between them. Line values denote the closeness required between the two activities. The lengths of the line visually indicate the desired proximity while the number of lines denotes interdependency.

In his book, 'Making manufacturing cells work', Nyman (1992) emphasises the importance of incorporating cells into a strategy in order to address immediate objectives and overcome obstacles. He describes the following objectives to manufacturing cell implementation: lack of performance and accountability, time based management, saving money, job enrichment, customer and competitor pressure, widespread dissatisfaction, growth/contraction and overhead reduction. These objectives are more broadly defined by Nyman (1992) as follows:

- Lack of performance and accountability – Redesign of manufacturing related processes will improve accountability thereby improving performance.
- Cost reduction – Efficiencies born from cell implementation will lead to overall reduction in manufacturing cost.
- Job enrichment: Redesign of manufacturing-related processes will make the workplace more attractive to employees. Cells broaden responsibility, bring suppliers closer to customers, and instil a spirit of teamwork. The payoff is reduced turnover, retention of scarce resources, and improved customer satisfaction.
- Customer/competitor pressure: Companies, particularly those who are followers, want to avoid being bypassed by the competition. So they pursue cellular manufacturing, not out of conviction, but to catch up to others.
- Widespread dissatisfaction: Often financial performance is satisfactory, but management knows it could be better. Changes to the current system, however, bring only small improvements in terms of speed or cost. Cells become a way to achieve real breakthroughs in performance.
- Growth/contraction. Rapid changes in business level – up or down – produce a need to restructure. Cells become a logical alternative to the current functional organisation.

- Overhead reduction. Often overlooked in financial justification for cells is their impact on overhead. Well designed cells will reduce support functions like production control, engineering support, inventory related costs, expediting, and accounting, and will increase the capacity of fixed assets.

Nyman (1992:30) also names the main objectives of cell introduction as: '*on-time delivery, improved response, reduced inventory, improved quality, improved workflow, achievement of flexibility, culture change, delegation of accountability, better use of plant, better use of skilled labour, job satisfaction, and information flow*'.

4.4 Performance during organisational change

The researcher found literature by accredited scholars and researchers on the subjects of change management and staff motivation and performance, and conducts a review of the literature in this section.

In order to address the concern regarding the future sustainability of the scheduling department, the management team were compelled to focus on the success of the restructure as well as the maintaining of motivation and performance levels of staff during the restructure, as both are determinants for ensuring department sustainability. As reorganisation is so unsettling, it has the potential to decrease production and this was the significant threat facing the scheduling department along with the need to improve service delivery through restructuring. Ackoff (1994) puts this into perspective by emphasising that the potential for layoffs associated with organisational change is a key contributor to a reduction in staff productivity during the change process and that this is more prevalent the lower one goes in the organisation.

As previously mentioned, organisations throughout the world have to continually change in order to meet the changing demands of the industry and the customer. If you are not changing then you are dying. However, change can often be very unsettling and could lead to a reduction in productivity because managers face staff morale issues when implementing change management through a process of restructure. Poor or lowered morale can lead to a reduction in performance, hence morale and productivity go hand in hand. Therefore, as a result of the continuous corporate reorganisation today, the challenges for every manager is to remain people focused and to change manage people effectively so as to minimise performance loss through re-organisation.

It is important, however, to consider whether it would be possible, for an organisation to adapt to a changing environment without having to reorganise, thus avoiding the negative impact of change on productivity discussed above. Ackoff (1994:169) states that "*if it were possible to design an organisation that could adapt to change that affects it without reorganising, then the resistance to change would be significantly reduced*". He believes that such an organisation design is possible and

its product is called the multidimensional (MD) organisation. Ackoff (1994) maintains that the multidimensional organisation avoids reorganisation by placing the various labour elements of the business throughout all levels within the organisation. Then when the organisation needs to adapt, it merely re-allocates resources accordingly. However, the question still remains as to whether this theory holds true for the scheduling department co-location restructure. Although a multidimensional organisation is discussed in the context of organisations as a whole, and the scheduling department co-location restructure is described at departmental level.

It was stated earlier, that there is no evidence of a direct link between performance and organisational change. However, the researcher did identify literature of accredited scholars and researchers that highlighted benefits of organisational change that allude to improvements in performance for example Harris & Ogbanna (2005) report on a case study where the change structure had positive performance outcomes for the company and individuals. They also note that in addition to these positive outcomes there was also a range of negative impacts. While Smith, I (2005), in a comprehensive series that discusses the people aspects of organisational change, takes issue with the popularly held notion that people will tend to resist change, noting that this is an oversimplification. There are those individuals and groups who experience change and transition as exciting and stimulating. There are also those who consider change as something to be resisted at all costs as they experience change as deeply unsettling and a threat to their sense of self. However, the author of this research found that the change process experienced by the staff was largely negative and that the change was not seen as exciting and stimulating. Furthermore, Weymes (2005) asserts that the creativity of individuals is unleashed when they are given the opportunity to express their individual freedom and when they feel that their actions make a difference. Based on this one can hypothesise that, if managers can create an environment for increased empowerment then creativity could spur individual performance. Therefore, if a restructuring process brings about improvements in staff empowerment then surely this can counter the possible reduction in productivity associated with organisational change. Weymes (2005) warns that companies who focus on product design, production process and customer service in an attempt to create competitive advantage will fail in their attempt. That it is the skills and abilities of the staff in an organisation that will determine the future success of an organisation. Weymes (2005) discusses the need for a focus shift by managers from numbers to an environment of trust. Weymes (2005) through research provides a philosophy that encourages individual freedom and maintains an ordered society.

4.5 Conclusion

In review of the literature obtained by accredited scholars and researchers on the subject of restructuring for improvement, it is clear from the literature obtained that the link between organisational change or restructuring and the performance of the organisation is inconclusive. What is clear from reviewing the literature on the topic of restructuring or organisational change for

improved performance outputs is that there is an indirect link between the two. The indirect link is clearly the management approach to the change process.

It is clear from the literature obtained that there are themes that constantly appear when attempting to find evidence of the link between organisational change or restructuring and improved performance or organisational success. This theme could be defined as a management strategy that must be adopted if organisational success is to be realised, a catalyst for success. One could hypothesise, that organisational success as a result of improvements in performance or the quality of organisational outputs will therefore not be realised through the organisational restructuring that constantly surfaces in the literature of accredited scholars and researchers could be defined as follows: Management focus should be on skills and abilities of individuals in the organisation; to create an environment of trust; to create an environment that encourages individual empowerment; to create an environment that fosters individual expression; to create an environment that promotes a collaborative team effort and improved communication/interaction; and to create an environment that rewards good performance effectively. Simply put, it would appear that these themes are the catalyst for achieving improved organisational performance / improved quality of outputs through restructuring or organisational reengineering.

When comparing the literature review findings with the research undertaken by the researcher in this study, the topic of co-location restructuring and subsequent hypothesis of restructure defining the motivation-performance cycle (defined in detail in Chapter 8), has key significance as a research subject. This study contributes to the literature of accredited scholars by providing the requirements, necessary for improving service delivery through restructure, hence providing the vital catalyst for ensuring improvements in organisational performance as a result of success through effective change management. The scheduling department co-location restructure was driven primarily by the need to improve the service delivery outputs of the department. However, success is achieved not only through the physical restructuring of the department but through, firstly, focus on a design of the restructure that creates a working environment that encourages improvements in role interaction, openness, breaking down of barriers, empowerment, reward, and process efficiencies. Secondly, through developing an understanding of how to maintain motivation and performance levels during restructuring.

In the section to follow, the action research cycle continues with the application of the data gathering techniques begins with the defining of the service improvement indicators, designed to guide the researcher in determining the level of restructure success in improving the service delivery of the scheduling department.

PART V

APPLICATION

CHAPTER 5 – SERVICE IMPROVEMENT INDICATORS

5.1 Introduction

In Chapter 1, Section 1.3 the problem situation confronting the management team was described through the raising of the concern that; failure by management to (a) improve the service delivery of the department, through the physical restructuring of roles into co-located teams and procedures, and (b) maintain staff motivation and performance levels during the restructure, will result in the restructuring project being a costly waste of time and will threaten the future sustainability of the department. Furthermore, from this concern the fundamental question was posed: Is it possible to improve the service delivery of a department by physically restructuring the department roles into co-located teams and team procedures, while maintaining the department's staff motivation and performance levels, thereby ensuring department sustainability into the future?

In order to answer the fundamental question posed, the researcher must first determine the level of restructure success in bringing about improvements in service delivery by the department. In order to do this, the researcher must, through data gathering and analysis, determine the level of improved service by the department. However, the first step in attempting to determine restructure success is to define indicators that, through research focus, will provide evidence of the level of restructure success achieved. These improvement indicators, that will determine the level of restructure success, must be aligned to the original focus areas that defined the restructure. In this chapter the improvement indicators are defined, a critical step that will lead to the defining of the interview questions, the ordinal survey statements and the graphed data that will be gathered from the department. Therefore, the service improvement indicators will determine the type of information that will be gathered as they define the interview and survey responses. Once the service improvement indicators have been identified, the theoretical framework, as described in Part III of this paper, can be applied in order to implement the data gathering techniques and, in so doing, set the foundation for data interpretation and evaluation.

5.2 Defining the service improvement indicators

In order to define the key success indicators, the researcher asked the following question: What will be the key contributing factors to the success of the restructure under each focus or target area (as described in Chapter 1, Section 1.2.1)? In order both to answer this question and to determine the improvement indicators, the researcher makes use of the focus areas to define a causal loop diagram (depicted in Figure 5.1 below) to identify the service improvement indicators.

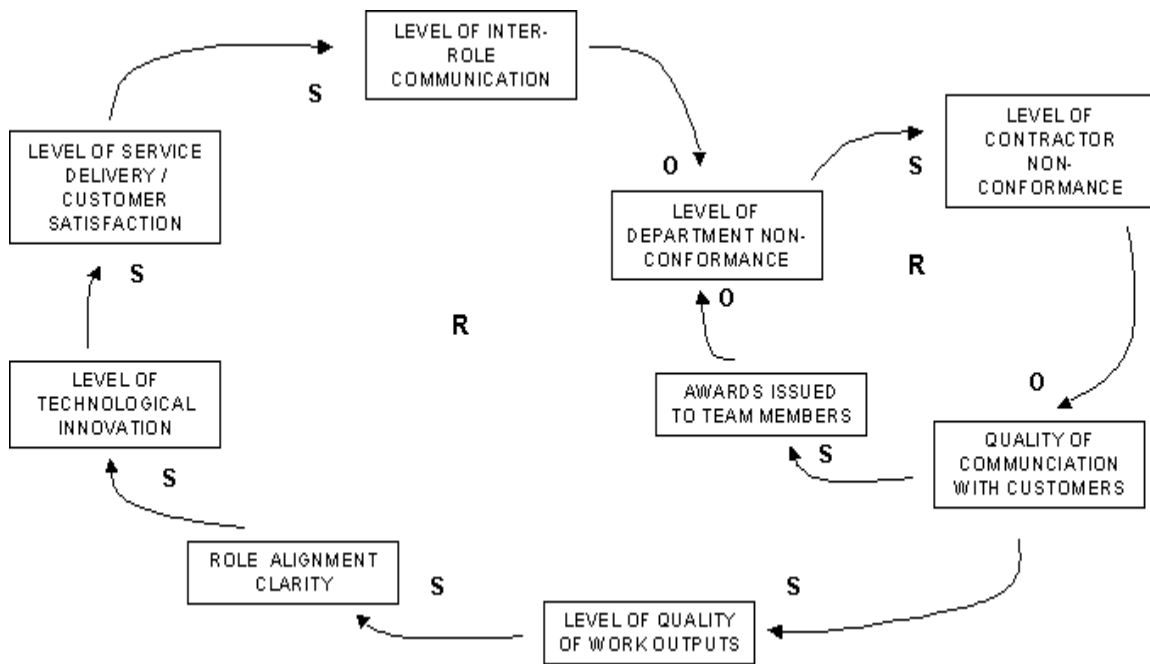


Figure 5.1 Causal loop diagram – Improvement indicators

The defining of the causal loop relationships between the restructure focus area sub categories, makes it possible to identify the key success indicators. The description of the CLD in Figure 5.1 above answers the question posed earlier in this chapter: The level of inter-role communication or role interaction within the department determines the level of non-conformance of staff to the rules and procedures. A high level of interaction amongst staff will result in lower levels of non-conformance when staff members work together towards a common goal. Therefore, the level of inter-role communication is a key improvement indicator in determining the success of the physical structure changes. The level of inter-role communication will be enhanced by the effectiveness of the open plan office and the effectiveness of the co-located cluster teams. The level of non-conformance within the department will affect the level of contractor conformance. If there is a decrease in department non-conformance this will result in a decrease in contractor non-conformance because the contractors at depot level take direction from the department. Contractor non-conformance can be reduced through effective contractor management and performance – another improvement indicator under the focus area, ‘non-conformance’.

A reduction in the non-conformance by the contractors will result in an increase in the quality of communication with customers by the department, thereby decreasing customer frustration. The level of department non-conformance can be reduced through the reward performance process and is, thus, defined as an important improvement indicator. Therefore, an increase in the quality of communication with customers in turn increase team recognition through the reward process, thereby decreasing the level of non-conformance in the department. Communication with customers is thus another improvement indicator for determining restructure success. The level of quality communication with customers will determine the quality of the work outputs. In addition, it will

determine both the department's ability to effectively problem solve and the number of accolades received by customers as a result of good service. Therefore, problem solving ability and accolades success are important improvement indicators. The level of quality of outputs will be determined by the quality assurance process, so the success of quality assurance in improving quality is a further improvement indicator to restructure success. The level of quality of work outputs will determine the clarity of roles and, similarly, an increase in role clarity will, in turn, increase the level of quality of work because the understanding of roles by the staff encourages staff empowerment. Therefore, the level of role clarity and level of staff empowerment are also important improvement indicators to the quality of work outputs. Increases in role alignment and quality of work will result in an increase in the need to harness technology to improve quality further. Hence technological innovation is an improvement indicator of quality. Improvements as a result of technological innovation will in turn determine the level of service delivery to the customer. The improvement indicators, indicated in the CLD above, are presented in Table 5.1 below and are linked to the target areas that each improvement indicator will address. The improvement indicators define the research goals, and the outcome of the analysis of the gathered research data, will determine the level of improvement against each improvement indicator, thereby determining the level of restructure success achieved by the management team.

| RESTRUCTURE TARGET AREAS | RESTRUCTURE SUB CATEGORY | SERVICE IMPROVEMENT INDICATOR | RESEARCH GOALS |
|-----------------------------------|--------------------------------------|--|--|
| Physical structure changes | Inter-role communication | Communication | Evidence of improvement in inter-role communication or interaction |
| | | Open plan | Evidence of open plan success |
| | | Structure change | Cluster Team Success |
| | Communication changes with customers | Communication with customers | Evidence of communication improvements with customers |
| | | Problem Solving | Evidence of improvements in problem solving |
| | | Accolades | Evidence of accolade success |
| Quality of work | Role alignment clarity | Global Best Practice | Evidence of global best practice |
| | | Role Clarity | Evidence that there is greater role clarity |
| | | Empowerment | Evidence of improvements in empowerment |
| | | Quality Assurance | Evidence of quality assurance success |
| | | Technological Innovation | Evidence of success of technological innovation |
| | | Reward Structure | Evidence of reward structure success |
| Non-Conformance | Department | Contractor management and performance | Evidence of improved contractor management and performance |
| | Contractor | | |

Table 5.1: Linking restructure target areas to service improvement indicators

5.3 Conclusion

In this section, the service improvement indicators that will determine the level of restructure success, have been defined. These indicators will provide the answer to the first part of the fundamental question namely: *How can the service delivery of a department be improved, if at all, as a consequence of physically restructuring the department roles into co-located teams and team procedures?*

By successfully determining the level of service improvement against each service improvement indicator, the researcher will be addressing the original concern regarding the future sustainability of the department (delineated in paragraph one of this chapter). The improvement indicators are critical in the research process because they ultimately define the research direction. The design and implementation of each data gathering technique will include in their design, the focus areas as defined by the service improvement indicators, in order to draw out data aligned to each.

In the section to follow, implementation of the various data gathering techniques, used to gather the required data, is described in detail. The design of these techniques is aligned to the focus areas defined by the service improvement indicators.

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CHAPTER 6 – APPLYING THE DATA GATHERING TECHNIQUES

6.1 Introduction

The data gathering techniques have been defined through the theoretical framework, namely the structured interview, ordinal survey, graphed data and participant observation. The service improvement indicators have also been identified in the previous chapter. Before data gathering can be carried out though, it is important to ensure that the design of each data gathering technique is aligned to the documented theory so as to ensure the correct application of each, thereby ensuring their validity. Furthermore, as previously mentioned in Chapter 5, the questions and statements used in the interviews and ordinal survey must be aligned to each service improvement indicator in order to ensure that data gathered is similarly aligned. In this chapter, the researcher defines the link between each service improvement indicator and the data gathering techniques used for each, in order to draw out meaningful data for accurate evaluation and interpretation, so as to provide insight and an introduction into the manner in which he approached the data gathering and interpretation of data.

6.2 Data gathering coverage

Table 6.1 below shows how the improvement indicators will be measured by each data gathering technique respectively, denoted by an “X”. For example, the data that will be gathered through the structured interviews will provide evidence for all service improvement indicators apart from global best practice and technological innovation. Similarly, the ordinal survey to be conducted will provide data in support of structure change, cluster teams, communication with customers, problem solving, accolades, quality assurance, and technological innovation. This table not only defines the measurement of each service improvement indicator, but also provides the researcher with a valuable tool to guide him to the correct data source when evaluating the findings against each indicator.

| DATA GATHERING TECHNIQUES - COVERAGE ACROSS THE SERVICE IMPROVEMENT INDICATORS | | | | | |
|---|---------------------------|----------------|--------------|--------------------|-------------------------|
| Determining the level of restructure success in bringing about improvements in service delivery | | | | | |
| SERVICE IMPROVEMENT INDICATORS | DATA GATHERING TECHNIQUES | | | | |
| | STRUCTURED INTERVIEW | ORDINAL SURVEY | GRAPHED DATA | CRITICAL INCIDENTS | PARTICIPANT OBSERVATION |
| Inter-Role Communication or interaction | X | | | | |
| Open Plan | X | | | | |
| Structure Change | X | X | | | |
| Co-located Cluster Teams | X | X | | | X |
| Communication with Customers | X | X | X | | X |
| Problem Solving | X | X | | | X |
| Accolades | X | X | | | |
| Global Best Practice | | | | | X |
| Role Clarity | X | | | | |
| Empowerment | X | | | | |
| Quality Assurance | X | X | X | | |
| Technological Innovation | | X | X | | X |
| Reward Structure | X | | | X | |
| Contractor Management and Performance | X | | | | X |

Table 6.1 Data gathering technique coverage across the service improvement indicators

Measurement of the service improvement indicators, by way of the data gathering techniques coverage, aligns to the fundamental question, which is crucial for achieving the research objectives. This becomes clear when reviewing both the concern and research question posed in Chapter 1. The concern is the department's sustainability into the future. The research question enquires whether it is possible to improve the service delivery of a department by physically restructuring the department roles into co-located teams and team procedures, while maintaining the department's staff motivation and performance levels for the sake of future sustainability. When comparing the research question and the answers required in order to effectively address the concern, to the data gathering technique coverage across the service improvement indicators, the link between the two becomes clear. The data gathering techniques selected must ensure that the research outcome satisfactorily addresses the concern by comprehensively answering the fundamental question by (1) effectively determining whether the co-location restructuring has brought about an improvement in service delivery and (2) identify a 'recipe' for maintaining motivation and performance levels so as to ensure future sustainability. By guaranteeing effective measurement coverage, the researcher will be able to ensure that the necessary relevant data, essential to answering the fundamental question, is gathered and, thus, determine the level of restructure success through the subsequent evaluation of this data.

In the section to follow, the design and implementation of the various data gathering techniques are discussed in detail, in addition to defining the data gathering technique design alignment to the success indicators identified. The researcher also critically reflects on the difficulties experienced with the implementation of each data gathering technique.

6.3 Implementing the data gathering techniques

6.3.1 Structured interviews

Interviews with the staff of the scheduling department form the key evidence of level of restructure success. Therefore the analytical procedures proposed by Miles and Huberman, described in Chapter 3 above, have been used extensively in this research paper to draw out the similarities in responses by the interviewees, from which accurate claims can be made. Argument building by the researcher then forms the basis for making claims regarding the level of restructure success achieved.

The structured interviews carried out with the staff of the scheduling department make use of a method of categorisation of the questions, in order to align the interview to the improvement indicators and to give structure to the interview. As discussed in Section 3.6.1 above, the interview will be designed to gather data both qualitatively, through interview transcripts, and quantitatively, through the use of an indicator scale. Table C.1 of Appendix C depicts the interview questions that were asked during the interviews and shows how each question is linked to each improvement indicator.

The questions have been formulated to draw out a comparative response from the interviewee, which indicates the change, if any, between the department prior to restructure and post restructure. The questions are two fold, for example: 'Describe the communication between delivery controllers, schedulers and pre-planners?' The first part of the question aligns the discussion to the improvement indicator, in this case inter-role communication - interaction. The second part of the question: 'Have things changed since the re-structure?' prompts the comparison between past and present. This part of the question is also open ended to encourage a more expressive response that clearly defines the interviewee's perception of the restructure changes, draws out the interviewee's views and focuses on the positive and negative attributes of the restructure.

Once each question has been answered, the researcher then asks the interviewee to rate the comparison between past and present on the rating scale as depicted in Table 6.2 below.

| INTERVIEW QUESTIONS - RATING SCALE | |
|------------------------------------|-------------|
| SCALE | GRAPH SCORE |
| Significant Improvement | 3 |
| Improvement | 2 |
| Partial Improvement | 1 |
| No Change | 0 |
| Slightly Poorer | -1 |
| Poorer | -2 |
| Significantly Poorer | -3 |

Table 6.2 Interview rating scale

By asking the interviewee to respond on the rating scale, a quantitative measure is created as a gauge of the interviewee's perception of the level of success of each improvement indicator, by applying and graphing the associated score. This data is graphed for analysis and is depicted together with the interview transcripts in Appendix C attached hereto. In summary, the design of the structured interview contains three key elements:

- the categorisation of questions aligned to the improvement indicators,
- the structure of the question which is designed to seek out comparisons,
- the rating of each question which is designed to give a high level view of the interviewee's perception of the level of success of each service improvement indicator.

Table 6.3 below shows the interview sample set, the number of staff who took part in the interview process. Ten staff were randomly selected and interviewed, totalling 35% of the department's permanent staff complement, and covering all roles in the department including the management team.

| STRUCTURED INTERVIEW SAMPLE SET | | |
|---------------------------------|-----------------------------|------------------------|
| DEPARTMENT ROLE | NUMBER OF STAFF (PERMANENT) | NUMBER OF INTERVIEWEES |
| Management | 5 | 2 |
| Scheduler | 5 | 2 |
| Pre-Planner | 4 | 2 |
| Delivery Controller | 15 | 4 |
| TOTAL | 29 | 10 |

Table 6.3 Structured interview sample set

In reflection, the researcher found the interview process a highly successful method for gathering the required data necessary to effectively analyse the level of restructure success achieved against each service improvement indicator. The combination of answers to questions, coupled with the responses to the rating scale, contributed to the richness of the data outputs. However, while the researcher felt that the sample set was large enough for the purpose of drawing out sufficient data, he found that the number of questions posed through the interview process resulted in too much data being gathered. This, in turn, led to significant time spent typing the interview transcripts for later interpretation. It also led to a laborious comparative analysis of data across the various data gathering techniques.

6.3.2 Ordinal response survey

The internal perspective of the restructure is adequately addressed because all the interviewees taking part in the structured interviews were staff within the department.

However, in order to ensure that an 'external perspective' of the restructure success was also gained, the researcher conducted an ordinal response survey selecting a sample set of 40 members of the company's field sales force, consisting of sales managers and sales representatives alike, across the commercial and retail departments respectively. Table D.2 of Appendix D depicts the ordinal response survey that was distributed to the Field Sales Force (FSF). The researcher was guided by the theories of Fink (1995) and Thomas (2003) (discussed in detail in Chapter 3) on how to effectively implement ordinal response surveys by ensuring that the statements were positive, as short as possible, and with singular meaning.

In reflection, the ordinal survey results gave a very good customer perspective of the level of success of the restructure across the selected success indicators and the quantitative nature of the data gathered allowed for easy graphing and interpretation. The graphed data also clearly highlighted the shortcomings of the restructure, clearly showing the areas requiring urgent focus. However, the researcher experienced difficulty implementing the survey. The sample set of 40 people had to be targeted twice because a very small portion of the sample set population responded the first time around. After the survey was distributed a second time and completed, the resultant number of completed survey forms was 50% of the original sample set targeted, namely 20

respondents. As a result of the time taken to conduct the survey, the researcher had to work with the 50% feedback result, although this was not an ideal situation for the research being undertaken.

6.3.3 Graphed data analysis

Graphed department performance data was gathered extensively in order to seek out performance trends that could provide evidence of the extent of the success of the restructuring process in improving the department's service delivery.

Correct interpretation of the graphs by the researcher was critical in ensuring accuracy of the research process and the findings, because a review of the theory of graphed data analysis revealed the various 'pitfalls' to graphed data analysis, as proposed by Parkin (1990). As discussed in Chapter 3, Section 3.8, the researcher identified the importance of correct graph analysis in order to ensure interpretation accuracy. The graphs gathered for analysis and evaluation are depicted in Appendix E, 'Graphed Data Results' and are described and summarised as follows:

- Graph E.1 shows the inbound service level percentage of the department. Delivery controllers' ability to answer inbound calls from customers, within 20 seconds from the time that the call is received, is constantly measured. Graph E.1 thus accurately reflects the current level of performance of the delivery controllers in terms of their answering ability and will be used as a measure to evaluate the key success indicator: Communication with customers.
- Graph E.2 depicts the comparison of the number of enquiry calls received by delivery controllers versus the number of enquiry calls received by the Intermittent Voice Response (IVR) telephone schedule update system, that automatically reads schedule information back to the customer. This graph thus depicts the positive effects of implementing new technology and will be evaluated in support of the service delivery improvement indicators: Communication with customers and Technological innovation.
- Graph E.3 depicts the number and type of contacts logged by delivery controllers, showing clearly the number of delivery enquiries logged by delivery controllers (in red) versus the number of delivery enquiries logged by the schedule update automated system (in green).
- Graph E.4 depicts the inbound service level as a percentage of calls answered within 20 seconds (as is the case with Graph E.1) and shows the effects of the implementation of schedule update on the inbound calls into the scheduling department.
- Graph E.5 is the same data as E.4, but this time depicts the service level change by month.
- Graph E.6 is the same service level information as Graph E.5 and depicts the service level change percentage.
- Graph E.7 shows the change in the number of calls received by delivery controllers as a result of the schedule update implementation. All these graphs also support the improvement indicators: Communication with customers and Technological innovation.

- Graph E.8 represents the percentage of calls made to customers informing them of order cuts at the time of scheduling, delivery failures and unscheduled orders. It provides a comparison of the level of successful of calls to customers before and after the restructure and provides key supporting evidence to the improvement indicator: Communication with customers.
- Graphs E.9 to E.11 depict the quality assurance results of the department since the inception of quality assurance during the department restructure and provides evidence in support of the improvement indicator: Quality assurance.

Table 6.4 below provides for easy reference to the graphed data gathered for the research process and provides alignment of the graphed data to each improvement indicator.

| DEPARTMENT GRAPHED DATA | | |
|------------------------------|----------------|--------------------|
| IMPROVEMENT INDICATOR | DATA GRAPH NO. | APPENDIX REFERENCE |
| Communication with customers | E.1 | APPENDIX E |
| Communication with customers | E.2 | APPENDIX E |
| Communication with customers | E.3 | APPENDIX E |
| Communication with customers | E.4 | APPENDIX E |
| Communication with customers | E.5 | APPENDIX E |
| Communication with customers | E.6 | APPENDIX E |
| Technological Innovation | E.7 | APPENDIX E |
| Communication with customers | E.8 | APPENDIX E |
| Quality Assurance | E.9 | APPENDIX E |
| Quality Assurance | E.10 | APPENDIX E |
| Quality Assurance | E.11 | APPENDIX E |

Table 6.4 Graphed data quick reference

6.3.4 Participant observation

In order to attempt to define the level of success of the restructure in a global setting, the researcher embarked on a two-week fact finding mission to the scheduling department based in the United Kingdom, the result of which provides data for the improvement indicator, global best practice. Global best practice is a term specific to the company in question that defines initiatives embarked on by a particular country within the group that, once implemented are deemed to be a model of best practice that can be applied to the rest of the global company. The researcher carried out participant observation by physically going to the United Kingdom and observing the operations of the both the scheduling department in Manchester and the depot operations at the depot in Stanlow. The researcher conducted the participant observation by first observing the processes and procedures that were taking place. While observing, notes were made of observations and at the end of each week the notes were transcribed into meaningful flow chart diagrams and process flow diagrams that

would allow for easy interpretation by others. Furthermore, comparative statistics of the staff compliment and roles was gathered, and the layout of the UK scheduling department was also noted from which a presentation to senior management was drafted.

Figure F.1 depicts the allowed channels of communication between the two departments (UK versus SA) and will be supporting evidence for the improvement indicators: Communication with customers and Technological Innovation. Figure F.2 depicts the UK pre-planning process to be adopted by the SA scheduling department and provides supporting evidence for the improvement indicator: Technological Innovation. Figure F.3 depicts the comparison between the UK and SA depot operations. It represents the process followed by the bulk vehicle driver when moving through the depot and depicts the differences in the processes in the two countries respectively. This schematic of the depot operation will provide supporting evidence for the improvement indicator: Contractor Management and Performance. Graph F.1 provides a comparison of the level of inbound telephone service levels between the two scheduling departments and Graph F.2, based on the same data provides a comparison of the number of calls received between the two departments. This comparison provides evidence for the improvement indicator: Communication with customers.

6.4 Conclusion

In conclusion, the link between each service delivery improvement indicator and the various data gathering techniques, have been described in order to clearly define how the researcher went about gathering data for analysis and evaluation. These links clearly show the measurement coverage of each improvement indicator across the various data gathering techniques applied. The various data gathering techniques have been described in detail explaining how the design of each is aligned to the service improvement indicators. The researcher has reflected on his personal account of implementing each data gathering technique. The structured interview questions and ordinal survey statements were described, detailing their design aligned to each service improvement indicator. In order to enhance the evaluation process, various graphed data results derived from the department during the restructure, as well as participant observation data gathered in the UK, have been described.

In the section to follow, the data gathered through the implementation of the data gathering techniques are critically evaluated against each improvement indicator and, in so doing, determine the level of the success of the restructure in improving the delivery service of the scheduling department.

PART VI

RESEARCH OUTCOME

CHAPTER 7 – DETERMINING RESTRUCTURE SUCCESS

7.1 Introduction

In the previous section the application of the various data gathering techniques used in the research process were discussed, relating their design and alignment to the service improvement indicators. In this chapter, the data gathered through the application of the data gathering techniques is analysed and critically evaluated in order to address the first part of the fundamental question, namely to determine the level of restructure success in bringing about improvements in service delivery of the scheduling department in order to ensure future sustainability. The researcher makes use of the principles of the argument building, in order to critically evaluate and draw conclusions as to the extent of service improvement against each service improvement indicator, respectively.

An argument will be generated for each improvement indicator and will then be evaluated for validity and soundness against the data gathered. In other words, on stating the argument, the researcher will set out to find supporting evidence in the data, whether for or against an improvement in service. The data will then be interpreted and from these findings assumptions can then be made and reasons given either for the success or failure of the restructuring process. From the outcome of this reasoning a substantive claim will be made, either for or against each service improvement indicator. The actions derived from the evaluation process, if any, will form the next cycle of research.

7.2 Service improvement evaluation

From the outset, it must be stated that in the interviews conducted with the staff of the scheduling department, the responses from the interviewees on the most part, were very positive across all the key success indicators. The researcher will, therefore, approach the analysis of the interview data with the aim of uncovering evidence of the areas of restructure that did not fare as well and, in this manner, attempt to define the level of success of the restructure. Each key success indicator will now be evaluated making use of the argument-building framework. In each case, the researcher has analysed the interviewee responses and categorised like responses into themes for each success indicator. Analysing and sorting the interview data in this manner presents the data in a more coherent manner, thereby facilitating easy evaluation of the data by the researcher. Furthermore, in the case of specific success indicators, evaluation of the interview transcripts is supported by the ordinal survey results, together with the graphed performance data and the results of the participant observation gathered from the department, where applicable. Each success indicator will now be critically evaluated in an attempt to address the fundamental question posed.

7.2.1 Inter-role communication / role interaction (Transcript Code: IC)

The literature review in Chapter 4, introduced the concept 'System', and it was mentioned that, key to the quality of outputs of any organisation, is the ability of the system's internal elements to interact harmoniously or in a state of balance with one another. Similarly, the literature review revealed a link between the objectives of the manufacturing cell proximity diagram and the co-location restructuring aimed at producing critical improvements in role interaction in order to enhance departmental outputs. Based on this, the inter-role communication or interaction between roles within the scheduling department, as a service improvement indicator, is pivotal in determining the success of the department co-location restructuring. Similarly the inter-role communication or the service improvement indicator is pivotal in addressing the fundamental question, because evidence of role communication improvements will provide support for co-location restructuring as a solution to improving the service delivery of a department.

The researcher puts forward the following argument for evidence and testing: The scheduling department restructure has brought about significant improvements in inter-role communication between delivery controllers, pre-planners and schedulers, including management. When reviewing Graph C.1, Appendix C, although interview responses to inter-role communication were very positive, this particular improvement indicator achieved the second lowest result in relation to the other indicators. This is indicative of the negative responses during the interviews. When taking a more detailed look at interview scores as depicted in Graph C.8, Appendix C, it is evident that there were mixed feelings across management, delivery controllers, schedulers and pre-planners alike, regarding the improvement of inter-role communication. While most of the interviewees felt that there had been an improvement, three respondents indicated that they did not feel that the improvement was significant. However, in order to draw accurate conclusions, a detailed analysis of the interview responses is required.

Analysis of the interview transcripts reveals comments made by the interviewees both in support of and against the level of success of the restructure in bringing about improvements in inter-role communication. The grouping of the transcript comments relating to inter-role communication are depicted in Interview Analysis 1 of Appendix C. The following themes are revealed through evaluation of the interview transcripts:

- *Scheduler and Pre-planner interaction;*
- *Management and the roles;*
- *Delivery Controllers and the roles;*
- *Comments against inter-role communication*

Interpretation of the above four themes reveals the following: In terms of the interaction between scheduler and pre-planner, the interview comments suggest that there is an improvement in communication. A greater amount of communication is now taking place between the two roles as a

result of the co-location changes made, namely the seating of the roles together in each cluster team. Furthermore, there is an indication of a closer interaction between pre-planner and scheduler since being seated next to one another which, in turn, has improved the quality of work produced by the pre-planners. In terms of the communication between management and the roles, the interviewees' comments suggest that the restructure has brought about improvements in management's accessibility. This ease of access has resulted in more open communication with management, which has improved the level of support provided by management. There is also an indication that, because there is now open communication between management and the roles, management is perceived to be part of the team and not a separate entity as in the past.

In terms of delivery controllers and the other roles, comments suggest that the restructure has brought about improvements in the delivery controllers' interaction with each other. The evidence suggests that there was a gap in communication between delivery controllers and schedulers, prior to the restructure, which, according to the interviewees, meant that there was almost no interaction between the roles. Since the restructure, schedulers are able to overhear problems due to close proximity to the delivery controllers, and can then suggest solutions, or assist them with problem-solving.

Referring back to earlier comments regarding the interpretation of graphed results and combining these with the final theme, as highlighted through the interview transcripts, the data suggests that there is still room for improvement between delivery controllers and the other roles. The superior communication and interaction between the pre-planners and the schedulers has been the most significant improvement in terms of role inter-communication and interaction.

Given the evidence and the interpretation thereof, certain assumptions can now be made regarding the impact of the restructure on inter-role communication. There is clear evidence to support an improvement in inter-role communication collectively. The restructure has seated the pre-planner and scheduler next to each other and it is clear that this has improved communication between the two roles. Management's interaction with the roles has also improved and it is clear that the accessibility of management through the restructure has increased inter-role communication. Better communication has brought about improvements in teamwork and successfully broken down the earlier management – staff segregation. It is also clear that the restructure has resulted in the creation of an open environment that readily promotes spontaneous communication between the roles because proximity allows individuals to overhear problems and then to offer assistance. There is, however, still room for improvement in terms of the communication by delivery controllers and the other roles. The question that must be posed as a result of these findings is: Why are there still communication issues between delivery controllers and the other roles and what can be done to encourage better communication processes?

In terms of the comments against inter-role communication improvements, it is evident from the interviewee responses that more focus must be given to the interaction between schedulers and delivery controllers. However, the outcome of the interviews does not reveal what needs to be done.

Based on the above mentioned assumptions, a claim can now be made that the restructure has brought about an improvement in inter-role communication and has fostered a closer knit team who is able to communicate more spontaneously with each other and, in the case of the pre-planners, has actually improved the quality of work output. However, the delivery controller and scheduler interaction requires further changes to ensure improvements in this interaction. With reference to the fundamental question posed earlier, the interaction improvements achieved between scheduler and pre-planner through the restructure, supports the co-location restructuring as a catalyst for improved service delivery. This is because the daily communication interaction between schedulers and pre-planners will determine the quality of the schedules as key service delivery outputs. Furthermore, the transcript evidence also reflects an improvement in the interaction of management and the roles, which has resulted in management's increased participation in the daily departmental operations. These claims support the original argument presented, namely that the scheduling department restructure has brought about some promising improvements in inter-role communication between both pre-planners and schedulers and management and the roles. However, focus must be given to the interaction between schedulers and delivery controllers because this has been identified as still exhibiting problems that will negatively impact the delivery controller's ability to effectively problem solve which is a key delivery service output.

7.2.2 Open plan (Transcript Code: OP)

As discussed in Part I, with the implementation of the cluster teams, the floor changes brought about a move from a partitioned, closed plan office with management and staff separated by a wall (Refer to Chapter 1, Figure 1.3), to an open plan office. Prior to the restructure, the scheduling manager was not entirely certain what the effects of the open plan situation would be on the department as a whole, and on each role respectively. The main driver behind a move to open plan, however, was the need to create an open environment that would support the operational environment that is synonymous with a scheduling department, namely daily crisis handling. The aim was to create an open plan environment that would result in more management involvement and knowledge of the day-to-day operations, and to encourage open communication that would promote improved response to daily operational issues or crisis situations by the department. Therefore, the success of the move to open plan will be determined by taking into account the original aim of open plan implementation, namely an improvement in role communication and interaction as a team, driving common delivery service outputs.

The researcher puts forward the following argument for evidence and testing: The department restructure has resulted in an open plan office layout that has improved management's interaction with the roles and the day to day operations and has fostered good teamwork.

With reference to Graph C1, Appendix C, the responses of staff interviewed to open plan was very positive on the whole, although not the highest results in relation to the other improvement indicators. Graph C.9, Appendix C represents the interview results and clearly provides support for the success of open plan implementation, with most of the results scoring high on the response scale. It is interesting to note, however, that one of the schedulers responded very negatively to the open plan implementation and this outcome warrants a closer look at the interview responses in order to determine why.

Analysis of the interview transcripts reveals comments made by the interviewees both in support of and against the level of success of the open plan implementation. Grouping of the transcript comments relating to open plan implementation (depicted in Interview Analysis 2 of Appendix C) reveals the following themes:

- *Openness and transparency;*
- *Management interaction;*
- *Work quality;*
- *Teamwork;*
- *Noise level*

With reference to transcript analysis 2, Appendix C, there is evidence to suggest that the change to open plan has brought about openness and transparency in the department and that people are more clearly visible and accessible which has resulted in a heightened awareness of the operations of the department. Furthermore, the evidence suggests that the openness has led to more tolerance amongst individuals, improving the manner in which people approach communication and interaction with one-another. Evidence also suggests that the open plan office has led to improved management visibility and that management is now seen as part of the team. The interviewee's perception of the quality of work outputs also appears to have improved as a result because the evidence suggests that communication and interaction is now quicker. There is also evidence that the open plan has resulted in an improvement in teamwork and, moreover, that staff's perception of the team has improved because they now see everyone (including management) on the 'same level'. It, therefore, appears as though the open plan environment has successfully integrated management into the team. While the open plan success seems to be significant, there is an underlying negative theme, namely the noise level and the issue of privacy without interruptions. This is evidence in support of the observation, made earlier in the review of Graph C.9, that the noise level and interruptions resulting from the open plan office are a particular problem for schedulers.

Based upon the given the evidence, and the interpretation thereof, certain assumptions can now be made regarding the impact of the introduction of an open plan setting in the department. It is clear

that there is overwhelming evidence to suggest that the new open plan environment has brought about improvements in the department. The open plan environment clearly encourages openness and transparency. Consequently everyone in the department knows what is going on around them and there are no secrets. Staff also appear to have a more heightened awareness of their surroundings. An environment of this nature will most definitely reduce gossip and secrecy, thus encouraging a more work-focussed environment. It is also clear that greater tolerance amongst individuals has been achieved, because people have to approach each other with more respect and with formality than they would if communicating behind partitions or a closed door. Management's visibility has also improved dramatically and the barriers between management and staff appear to have improved, resulting in complete integration by management into the team. Communication with management has definitely also improved as a result. Improved and quicker communication results in improved quality of work.

As stated previously, however, open plan office implementation has two distinct drawbacks as identified by the interviewees, namely an increase in noise and a decrease in privacy. It is clearly evident from the interview responses that there is a significant increase in noise levels as a result of the restructuring, because sound generated by the department can no longer be subdued by partitions and thus travels further. Furthermore, it is clear that when looking at the nature of a scheduling department, noise levels negatively affect schedulers the most because of the high concentration levels required by them on a daily basis in order to produce quality schedules. Thus one might conclude that while the open plan environment has resulted in an increase in work quality in general, it may have a negative impact on the schedulers' quality of work output because of a possible loss of concentration. Furthermore, the delivery controller and pre-planner may also experience a loss of concentration that could negatively impact on the quality of problem solving as well. Another drawback that is not prevalent in the data, is the fact that management has to hold certain confidential conversations whilst working in the open plan office area and, the consequent lack of privacy, can seriously hamper these important communications. This reduction in confidentiality may, in turn, result in a decrease in the effectiveness at which management manages the day-to-day operations of the department.

Based on the assumptions made earlier regarding open plan office layout, a claim can now be made that the restructure and subsequent move to an open plan environment has led to improved openness and transparency amongst individuals. This transparency has also resulted in improved communication "etiquette" which has led to the full integration of management into the team, thereby breaking down 'us and them' barriers and improving teamwork. However, the improvement of quality of work in the department is debatable, owing to the negative impact of open plan in terms of increased noise levels and decreased privacy.

From this evaluation, the perceived improvement in the quality of work, as a result of the introduction of open plan structure needs to be tested further for validity because noise levels can negatively affect concentration levels and this could lead to a reduction in work quality. Furthermore,

management needs to identify a solution to the noise problem, particularly in the case of schedulers, and determine the impact of the noise level on the quality of schedules.

In conclusion, based upon the evidence produced, it can be stated with certainty that the restructure has resulted in an open plan office layout that has improved management's interaction with the roles and day-to-day operations of the scheduling department which, in turn, has fostered better teamwork. With reference to the fundamental question posed in Part 1, the move to an open plan layout both supports an improvement in service delivery outputs through enhanced teamwork. However, it cannot be stated with confidence that the open plan supports an improvement in the quality of delivery service outputs by the entire department. While it may not necessarily negatively affect the quality of outputs, high noise levels on a particular day may reduce the quality of outputs on that day. Therefore, it can be argued that open-plan changes both support and undermine co-location restructuring as a model for improved service delivery by the department.

7.2.3 Structure change – Cluster team (Transcript Code: CT)

The team concept, introduced to the department through the implementation of co-located cluster teams, and based on the manufacturing proximity model, was implemented with a key aim of bringing about improved interaction and communication between the roles, thereby enhancing the quality of work 'produced' by the department. As discussed earlier, this fundamental change to the department was undertaken in the hope that the effects of the change would bring about similar improvements in service delivery outputs by the department, to those proposed through manufacturing cell implementation. Furthermore, the success of co-location restructuring on customer service delivery was also tested through the ordinal survey, the results of which need to be analysed in conjunction with the results of the staff interviews. The researcher puts forward the following argument for evidence and testing: The department restructure has resulted in improvements in communication and the quality of service delivery outputs by the department, through the introduction of co-located cluster teams.

Cluster team and inter-role communications were analysed and graphed jointly in Graph C.8 and, as discussed earlier, the responses from the staff were very positive. However, when comparing the results of the ordinal survey under cluster team, in which the field sales force (FSF) were asked to respond to the statement: 'Cluster teams have led to an improvement in customer service', the results are very different. Graph D.1, Appendix D represents the combined ordinal survey results and from this graph it is clear that the combined responses to customer service improvement, by external customers, were neutral. In Graph D.2 depicting the retail FSF responses, retail felt that there was a limited improvement, while commercial felt that the service had worsened slightly as shown in Graph D.3. The neutral result achieved through the ordinal survey statement could be related to the level of understanding of the FSF to the statement regarding cluster teams. The researcher assumes that the FSF know what this concept means. In hindsight, the ordinal survey

statement should have been more explanatory, perhaps with a definition of each statement. However, analysis of the interview transcripts should provide enough supporting evidence to draw accurate conclusions with respect to the level of success cluster teams have had on improving customer service. Grouping of the transcript comments relating to the implementation of co-located cluster teams are depicted in Interview Analysis 3 of Appendix C. The following structure change to cluster team themes were revealed:

- *Problem resolution;*
- *Expertise*

From the interview responses there was no negative feedback and the evidence suggests that there is overwhelming support for the cluster team implementation. The themes arising from the interview responses are problem resolution and expertise, both important elements in improving service delivery outputs. There is evidence to suggest that cluster team implementation has resulted in improvements in both problem resolution and individual expertise gained in a particular area of focus. The evidence suggests that the close proximity of roles, as defined by the clusters, makes communication easier, increases timing on problem resolution, and enhances quality of problem resolution. There is also evidence to suggest that the cluster team visibility assists staff entering the department to identify the right person to speak to, regarding a specific depot cluster and/or customer associated with a specific cluster team. Furthermore, it appears as though the bond between the roles has improved as a result of the cluster team implementation.

In light of the evidence provided and the interpretation thereof, certain assumptions can now be made regarding the impact of the introduction of cluster teams or cluster cells into the department. There is overwhelming evidence to suggest that the cluster team implementation and impact on customer service delivery has been significant. Cluster teams have resulted in a closer working relationship between the three roles. The close proximity of the roles in each team has led to improved communication and the spin off of this has been improved quality of problem resolution. The speed and quality of problem resolution has definitely improved because delivery controllers can speak easily to the scheduler and pre-planner in the same cluster team, while the customer is holding on the line, hence the environment for the live resolution of problems is clearly evident. Furthermore, the fact that individuals are assigned to a specific cluster team means that expertise within that area of focus has been enhanced significantly. In turn, it can be stated that expertise in a particular field will also enhance department outputs, quality of both problem solving and schedules.

Based on the assumptions made regarding cluster team implementation, a claim can now be made that the implementation of cluster teams, through the department restructure, has definitely enhanced communication and interaction, and the quality of problem solving. This has created an environment for the development of individual expertise in a particular area, further improving the quality of outputs from the department, namely the quality of both problem resolution and schedules. With reference to the original argument, cluster team implementation has not only improved

communication and quality of work, but also brought about specific ‘pockets’ of expertise, thereby improving the department’s overall level of customer service delivery. From this evaluation, management needs to continue to look for ways of enhancing cluster team performance through the introduction of cluster team KPIs and team performance rewards. With reference to the research question raised in Chapter 1, the success achieved through the implementation of cluster teams supports the co-location restructuring as a model for improving service delivery.

7.2.4 Communication with customers (Transcript Code: **CC**)

As with inter-role communication, improvement in the communication with customers is a critical service improvement indicator. It is pivotal in attempting to answer the fundamental question posed in Part 1 of this thesis, because if the co-location restructure has not brought about an improvement in communication with customers, the department would not be able to deliver on the service outputs, such as problem resolution solutions, schedule changes, order cutting and pre-delivery instructions.

The researcher puts forward the following argument for evidence and testing: The department restructure has brought about an improvement in communication with customers and, hence, the improvement in service delivery.

When looking at the graphed results and interview responses to communication with customers, two elements have been tested, firstly, the staff’s opinion on the level of improvement in communication with customers and, secondly, the staff’s opinion about how customers feel regarding the level of improvement in communication. The staff survey approach was adopted, as a survey could not be conducted with customers directly. When looking at Appendix C, Graph C.1, it is clear that the staff rated communication with customers as having improved significantly, while they were not as optimistic about the customer’s perception. In fact ‘Customer’s opinion on communication’ was the lowest scoring success indicator. Furthermore, when looking at the ordinal survey results, sales representative responses to communication, as represented in Graph D1, communication into and out-of the department, was given very low scores while ‘problem-solving feedback’ (on the same graph) fared better. In summary, the scheduling department staff felt that there had been a dramatic improvement in communication, while the customer and field sales force felt otherwise. The reason for these two extreme results warrants investigation. It is interesting to note that, when looking at Graph E.1, which depicts the inbound service levels (the scheduling department’s ability to answer calls from customers within 20 seconds) the average call response time within 20 seconds is only 45% of all calls. In other words, 55% of customer calls are being queued in the ‘wait field’. This result is linked to the service improvement indicator, ‘communication into the department’ and may shed some light on the low score given by the respondents. It may well be due to the frustration experienced by the sales representatives and customers as they wait in the ‘wait field’ to speak to a delivery controller. However, further evidence to support this theory must be obtained from analysis of the interview transcripts. Grouping of the transcript comments relating to the implementation of

direct access for customers are depicted in Interview Analysis 4 of Appendix C. The following themes regarding improved communication with customers were revealed:

- *Direct Access and live resolution;*
- *Wait field concerns*

From the evidence drawn from the interview themes above, it is clear that the staff feel that there has been a significant improvement in the communication channels with customers. It is also evident that the restructure has brought about a more open and direct line of communication with customers and that this has, in turn, promoted improved problem solving and feedback to the customer, a factor which is also evident in section 7.5.5 below. Furthermore, it is clear from the interview responses that direct communication with the customer has led to more accountability by the delivery controller in terms of problem solving and feedback to the customer. This direct contact has resulted in an environment for immediate problem resolution or live resolution of a problem, a good service improvement. However, the evidence gathered supports the fact that the telephone response time is a significant service issue and this seems to be the Achilles heel of the department. Prior to the restructure the customers' main frustration appeared to be their inability to speak to someone who could resolve their problem, now their frustration has changed to the length of time waiting for the call to be answered.

When looking at the structure of the interview questions and ordinal survey statements with hindsight, the questions/statements around communication improvement with customers could have been more specific and detailed. For example, there should have been a specific question concerning the 'wait field' issue and a specific question concerning the improvement in direct access. These questions may have yielded very different results. However, based on the data gathered, there is no doubt that the department's inability to answer the calls immediately is a significant problem and may even support a very negative customer opinion of the scheduling department's service as a whole.

A closer look at the ordinal survey results as shown in Graphs D.1, D.2 and D.3, Appendix D, indicate that communication out of the department, is not much better than that of incoming calls. As previously mentioned in Chapter 1, the outgoing calls to inform customers of scheduling order cuts, delivery failures and unscheduled order status is equally important. Evidence suggests that, although the commercial response to improvement in outgoing calls was positive, the overall perception from field sales force is that it has worsened since the restructure. The responses from the pre-planners who were interviewed, suggest that since the implementation of a more direct line of communication into the department, via the delivery controllers, the pre-planner receive far fewer calls and that the call channels allowed by customers are more structured. One could deduce that this would promote more productivity by the pre-planners as fewer calls are received than prior to the restructure.

Given the evidence and the interpretation, thereof, certain assumptions can now be made regarding level of success of communication with the customer. It is clearly evident that introducing direct access with customers was the correct decision to take through the restructure of the department because it promotes live resolution of delivery problems. This change is a significant improvement compared to the former problem referral system. However, while the customer service seems to have improved in terms of problem solving, the communication changes with the customer has led to customer frustration with not being able to get through to the department during peak times. This is a significant issue, as it is well known that if one wants to create a perception of good service with the customer, there should be no service issues that result in customer frustration. Customer frustration is, therefore, a powerful catalyst in turning a customer's perception of the overall service into a negative one and may well threaten the future sustainability of the scheduling department. With reference to the original argument that the department restructure has brought about an improvement in communication with customers and, hence, the improvement in customer service, it must be pointed out that there is only a partial improvement. The claim can be made that there has definitely been an improvement in service, as a result of direct communication and live problem solving. Conversely, there has been a definite degradation of service and service perception by the customer as a result of having to wait for the call to be answered.

The scheduling management team identified this problem of service degradation when direct access was implemented. Further reference to Graph E.1, Appendix E, indicates that the weekly monitoring of service levels has led to a very clever innovation that has improved the telephone response time to some extent. Graph E.2, Appendix E shows the number of calls offered to the scheduling department by month. The management team realised that by reducing the number of calls offered to the department, the response time would improve. However, in order to try to reduce calls to the department, the scheduling management team analysed the types of calls that the department was receiving. Every time the delivery controllers receive a customer call they log the call against a number of call processes. These call processes are depicted in Graph E.3, Appendix E and the results reveal that the highest number of calls are delivery enquiries. This contradicts the original role of the delivery controller, namely to offer a bulk fuel problem resolution service and not to respond to enquiries from customers about when their deliveries are scheduled, what quantities of fuel they are scheduled for, etc. As mentioned in Part 1, the department implemented an SMS service that gives the customer the information. In response to this, the scheduling management team implemented a program called Inbound Voice Response (IVR) schedule update, an option on the telephone IVR system that reads the schedule status back to a customer, so there is no need for him to phone in and enquire with the scheduling department. The positive effects of this implementation can be clearly seen in Graph E.2, Appendix E. In June 2004, the schedule update program was launched and the graph clearly shows how this steadily reduced calls to the delivery controllers. With the implementation of a second version of schedule update in May 2005, which provided the customer with even more schedule status information, the calls to delivery controllers

reduced even further. In fact from June 2005, the schedule update program received more calls than delivery control. Furthermore, Graph E.4 depicts the delivery control inbound call service level (call answer within 20sec) and the affects of a reduction in calls is very clear, with a steady increase in service levels over the same period. The monthly inbound call service level to delivery controllers, as depicted in Graph E.5, shows the improvement more clearly, a resultant 30% increase in service levels as shown in Graph E.6. The fact that customers still call into the scheduling department, despite the technological innovations put in place by the management team, may mean one thing: The customer is not getting what he/she needs, or the customer is becoming very frustrated.

Based upon the findings of the research into customer communication, it can be concluded that, despite the efforts made by management and the improvements in inbound service levels to the scheduling department, communication by customers into the department remains a controversial matter and threatens the success of the department restructure. The forward action required by management is to continue to look for ways to improve the inbound call response time. It is clear that innovative systems have been put in place, and the obvious next step is to educate the customers to make use of these. Furthermore, when the electronic schedule program (depicted in A.21 to A.23, Appendix A) is launched, it could be made available to the customer with less detail on the customer Internet portal. This will further reduce the need for customers to call the scheduling department and, in so doing, improve the call response time. With reference to the research question raised (set out in paragraph one of this chapter, direct customer access to the department has resulted in an improvement in service delivery through the live resolution of problems. This upgrading has resulted in a significant improvement in communication to customers from the department, thereby supporting the co-location restructuring process. However, the wait-field frustration of customers is a major threat to customer service and the fact that the co-location has not resulted in improved service delivery, may jeopardize the future sustainability of the department if this problem area is not given due attention by management.

7.2.5 Problem solving (Transcript Code: **PS**)

Problem solving by the delivery controllers is a crucial customer service measure because the quality of problem solving is a key output of the department. Furthermore, the effectiveness of problem solving measures determines the number of accolades that the department receives from customers and is thus crucial in determining service levels within the department.

The researcher puts forward the following argument for evidence and testing: The department restructure has brought about an improvement in the quality of problem solving, a key department output and as a result, has brought about a significant improvement in service delivery to customers. When reviewing Graph C1, Appendix C, problem solving scored very high against the other success indicators. Similarly, Graph C12 depicts the problem solving results across the roles and very positive interview responses to problem solving improvements are also evident with all respondents.

Analysis of the interview transcripts will reveal the level of improvement in problem solving as a result of the restructure. Grouping of the transcript comments relating to problem solving are depicted in Interview Analysis 5 of Appendix C. The following problem solving themes were revealed:

- Standardisation and Structure
- Cost reduction
- Quality
- Timing

Evidence drawn from the interview themes listed above suggests that the introduction of the problem-solving decision tree through the department restructure has brought about a standardised process for problem solving because each delivery controller is following a set procedure as opposed to each utilising his/her own individual problem solving method. Furthermore, the evidence suggests that the problem-solving decision tree, as depicted in Figure A13, Appendix A, has introduced a much-needed structure to the problem-solving process. However, it is also evident that, with the introduction of the problem-solving tree, some delivery controllers are over eager to please customers in order to obtain accolades and this might have a negative impact on the scheduling process. Evidence also suggests that some delivery controllers are still not following the decision tree. This omission, therefore, will need to be addressed through the quality assurance process. In terms of the second theme, cost reduction, it is interesting to note that, the decision tree introduction appears to positively influence cost reduction because the problem solving tree begins with the least cost to company resolution and moves upwards to more costly problem-solving such as vehicle spot hire, or hire of an additional vehicle. In terms of the quality and timing of problem solving, there appears to be overwhelming evidence of a dramatic improvement in service as a result of the introduction of the decision tree. The quality of problem solving appears to have improved as is evidenced by the following facts:

- customers' knowledge of the existence of the problem-solving tree;
- the detail in which the delivery controller is forced to look at the problem, from the standardised data gathering to the decision taken as defined by the problem-solving decision tree;

It is also evident that the live resolution of problem solving, as a result of a standardised problem solving method, coupled with direct access by the customer to delivery controllers, has resulted in very quick response timing to each problem.

When analysing the results of the ordinal survey in Graphs D1, D2 and D3, the problem-solving improvement result was scored second highest against the other success indicators, by the field sales force, offering evidence that the customers have noticed the improvement in the quality of problem-solving. The analysis of the evidence presented through the interview and ordinal survey results unquestionably indicates that there has been a significant improvement in all aspects of the problem-solving ability of the department, ranging from improved quality and timing to the

introduction of a standardised process for problem solving. Therefore, the claim can now be made that the restructure of the department has brought about a major upgrading in the quality, timing and structure of problem resolution which has extensively enhanced the level of customer service by the department.

Unfortunately, however, there is a downside to this improved customer service. As a result of the introduction of the problem-solving tree, customers can learn to manipulate the system to their advantage. Customers with knowledge of the decision tree can phrase their problem in such a manner that it increases the urgency of their enquiry and, in so doing, encourage the delivery controller to implement a solution that may cost the company money. This increased expenditure will need to be managed on a daily basis by the management team. In addition, delivery controllers are at different levels of ability in terms of implementing the solutions offered by the decision tree. This inconsistency in competence must be addressed through the quality assurance process and monitored closely by management, in order to further improve problem resolution. Despite these drawbacks, the scheduling department's key output in terms of service, namely problem resolution, has been changed for the better. With reference to the research question posed in Section 1, the problem solving improvement indicator supports the co-location restructuring process because the overall successful results of the introduction of the problem-solving initiatives have clearly led to an improvement in service delivery.

7.2.6 Global best practice

After the department restructure was completed, the researcher undertook a two week trip to the Manchester office in the UK in order to determine the extent of improvements on a global setting by comparing the South African scheduling department's operations with that of the UK scheduling department. Through participant observation, the sufficient relevant information was gathered to successfully conduct the comparison. The researcher puts forward the following argument for evidence and testing: The department co-location restructure has led to the department realising its vision of becoming a 'Global Best' leader.

Figure F1, Appendix F depicts the comparison of the SA scheduling department's permitted channels of communication with the permitted channels of communication of the UK scheduling department. The definition of 'permitted communication channels' are those communication channels that are allowed in terms of the company's policy governing the communication with the customer and, similarly, the customer's communication with the company. An initial of Figure F.1 appears to represent a far more detailed communication 'plan' for the UK, while Shell SA's plan appears to be more simplified or refined. The review of the communication with a customer with a delivery related problem begins on the left of the figure. In terms of the UK communication channels (red arrows), the customer can communicate his/her delivery related problem to three points, namely the Customer Service Centre (CSC), the retail office to the Field Sales Force (FSF) or

directly to the scheduling team. The South African customer has two communication channel options through which to lodge his/her delivery related problem, namely to communicate with the FSF or to go directly to the delivery controllers in the scheduling department. The communication channels between the scheduling cluster teams and management (cluster supervisors) and/or the contractor appear to be the same for both countries. However, the review of the communication channels outwards to the customer (green arrows) reveals a distinct difference between the two countries. In the case of the UK, feedback to a customer e.g. feedback on delivery failures, order cuts, etc. can be communicated either by the scheduling department or alternatively directly from the transport contractor.

Graph F.1 depicts the inbound service levels comparison between the UK and SA scheduling departments. The inbound service level is the measure of each department's ability to answer the customer's inbound call within 20 seconds, which, in turn determines how frequently customers must wait in the call wait-field for their calls to be answered. The blue bar graph represents the SA scheduling department's results versus the UK scheduling department's results (depicted by the red bar chart). A high level review of the graph comparison reveals a significant difference in results; with the SA inbound service level significantly higher than that of the UK. The monthly price change peaks are clearly visible in the SA results. Graph F2 depicts the number of calls that are offered to the department per week to each scheduling department respectively. It should be noted that the SA scheduling department is receiving a significantly higher call volume than its UK counterpart.

In terms of the depot operations comparison, Figure F3 depicts the gate-to-gate comparison between a depot in SA and a depot in the UK. Gate-to-gate is the term used to describe the procedure that a driver and vehicle takes to pass through the depot, from the time that the truck arrives at depot to the point of loading at the gantry, and then to the point of eventual exit from the depot. This comparison is important in terms of the scheduling department restructure study because efficiencies in the depot operations will result in efficiencies in scheduling. If there is an efficient gate-to-gate process then schedules produced can be implemented more effectively. A high level review of Figure F3 identifies the following key differences. In the case of the UK operation, the driver has an access card that is swiped at every point along the gate-to-gate process. Furthermore, the issuing of the loading note and the invoice is automated without human intervention, while in the SA operation, an individual in the control office issues the loading note. Furthermore, on entering the gantry in the UK, the driver can load three different products at once, while in SA only one product line can be connected to the vehicle at a time. Finally, in SA the truck must be sealed with seals, a system that requires additional time, while in the UK this action is not necessary.

In the review of the participant observation data gathered, an accurate interpretation can be made. In terms of permitted communication channels, evidence suggests that the SA scheduling

department deploys simplified communication channels to and from the customer. It is also evident that the contractor in SA is not permitted to speak to the customers directly and feedback is only permitted via the SA scheduling department. In contrast, in the UK there appears to be a more relaxed view on feedback that allows various channels to provide feedback to the customer. In terms of the inbound service levels, it is evident from the data collected that the SA scheduling department is managing calls more effectively than their UK counterpart. Similarly the call volume is far less in the UK, a factor that is possibly attributable to the higher number of communication channels available to the customer in terms of lodging a delivery related problem. It is also evident that the UK scheduling operation depot's gate-to-gate procedure, that utilises technological innovation, is more efficient than that of the SA gate-to-gate system. In terms of technological innovation in the scheduling departments, a CROSS Pre-Planning process (depicted in Figure F2) has been implemented in the UK, while the SA equivalent is the pre-plan forecasting program (depicted in Figure A19 and A20, Appendix A). The main difference between these two systems is that the UK process is more automated while the SA forecaster requires more human intervention. Further technology comparisons include the e-schedule program (depicted in Figures A21, A22 and A23) that is due to be implemented in the SA scheduling department as is. The evidence suggests that the use of technology in Shell UK is more advanced than that of Shell SA, while the SA scheduling department is implementing innovative programs such as the e-schedule that have, as yet, not been implemented in the UK.

It is clear from the UK-SA comparison that, in terms of communication improvements, the SA scheduling department has rolled out a far more efficient communication plan than that of its UK counterpart. Furthermore, it is also clear that, as a result of the clearer and simplified communication channels, calls received by the SA scheduling department are far more extensive in number than that of the UK, although the SA service levels are consistently higher than that of the UK. The danger in terms of the UK's communication options for the customer with a delivery problem means that the customer may not be able to speak to the problem solver and, hence, may have to be referred several times before the delivery problem is addressed. In the SA scheduling department calls are taken by the delivery controllers, the most appropriate problem solvers, allowing for live resolution and quicker turn around time in terms of problem solving and feedback to the customer. While communication channels are significantly better in SA, the UK has the technological advantage because it has implemented full automation, both in the scheduling department and at depot level.

In conclusion, consequent upon the review of the gathered data, the claim can now be made that the scheduling department restructure has resulted in changes that have brought about significant improvements in communication, both into and out of the scheduling department, in relation to the global situation. The communication channels are significantly better than that of the UK and hence promote improved service to customers. However, the SA scheduling department is behind in terms

of technological advancement and needs to focus on improving through the implementation of a CROSS pre-planning process and any other proven relevant technological advancements on offer from other operating companies worldwide. Therefore, the most appropriate action resulting from this assessment would be for the SA scheduling department to identify and implement such programs, and to continue using them in the future, so as to effect further improvements and realise more efficiencies in terms of the department's operations. Furthermore, although not directly related to the scheduling department restructure, improvements in terms of SA's depot operations need to be made in order to streamline operations at depot level because these, in turn, may result in further improvements in the scheduling department's service delivery. With reference to the fundamental question posed in Section 1, the improvements in terms of communication channel streamlining subsequent to the restructuring process, more effectively link the customer to the problem solver, in the person of the delivery controller, and, hence, promotes allows for improved service delivery. Therefore, the scheduling department restructure, comprising co-location restructuring in a global setting, can be offered as a model for improving service delivery as a result of more concise communication channels with the customer.

7.2.7 Role clarity (Transcript Code: RC)

The need to ensure that the scheduling department staff are clear in terms of what is expected of them in their respective jobs was identified as a crucial success indicator for determining restructure success. This is because failure to improve role clarity through the restructure would inevitably lead to a reduction in the work quality of staff. Based on this premise, the researcher puts forward the following argument for evidence and testing: The department restructure has brought about an improvement in terms of the staff's understanding of their roles within the department. The review of Graph C1, Appendix C reveals a positive result in terms of role clarity, however, this is a middle of the road score against the other success indicator results. Further analysis of Graph C5, the scheduler's scores, reveals the reason for this score. Role clarity scored very low with the schedulers, while the delivery controllers' results (depicted in Graph C6) reveal a very high score, clearly showing that the most significant impact of role clarity improvements was with the delivery controllers. The groupings of the transcript comments relating to role clarity are depicted in the Interview Analysis 6 of Appendix C. The following role clarity themes were revealed:

- Role Clarity and Quality Assurance;
- Role Changes;
- Role Direction;
- Timing and Role Clarity;
- Empowerment

Analysis of the above themes provides evidence that role clarity within the department has been significantly improved as a result of the restructure. This claim is supported by the fact that a number of these themes are mentioned in the interview transcripts. It is evident from the responses that there is a definite link between role clarity improvements and the introduction of the quality

assurance role during the restructuring process. The evidence gathered suggests that quality assurance has assisted in enhancing roles, particularly amongst the delivery controllers and the pre-planners. This comes as no surprise to the researcher because the quality assurance cycle continuously re-iterates role requirements through the quality assurance assessment process. In terms of role change, the evidence suggests that the difference between the level of role clarity before and after restructure has been so significant that it has resulted in the re-defining of jobs. Furthermore, the evidence suggests that the delivery controller role changed into a role that can satisfy customer demands. It is also evident that improvements in role clarity have led to clearer direction in terms of specific job tasks, post restructure.

In terms of timing and role clarity, the evidence gathered suggests that the length of time spent within a specific role has not resulted in any significant improvement in role clarity, a viewpoint that also seems to be held by the schedulers. This attitude is not surprising because the roles are very structured in terms of the schedulers' day-to-day tasks, a situation that has remained virtually unchanged despite the restructure. However, it should be pointed out that improvements in role clarity appear to have contributed to a sense of empowerment in cases where staff members feel empowered to excel in their positions.

From this interpretation of the data it is clear that the restructure of the department has brought about significant improvements in role clarity, particularly with delivery controllers and pre-planners. It is also clear that this improvement in role clarity has been significantly enhanced through the introduction of the quality assurance position and quality assurance process. Staff response indicates that staff members are more positive and more content post restructure because they know what they have to do daily and what is expected of them. From the interpretation of the data, the claim can be made that the restructure has brought about a great improvement in the staff's understanding of their roles, has changed the delivery control and pre-planner positions significantly and has resulted in more content and empowered staff members. With reference to the fundamental question posed in Section 1, role clarity improvements support the co-location restructuring as a model for improving service delivery.

7.2.8 Empowerment (Transcript Code: **EMP**)

Empowering staff, namely giving them power to take the decisions that are required of them in their roles, is crucial, not only for the job requirement but also for the individual's well being. By empowering staff, managers are showing their staff that they trust them, that they trust the staff member's ability and judgement and this builds self worth and confidence. A key requirement of the restructure was to ensure such empowerment and based upon this condition, the researcher puts forward the following argument for evidence and testing.

The department restructure has resulted in staff being more empowered to make decisions in the department.

It is evident from the analysis of Graph C1, Appendix C, that, while there was a positive response to empowerment, it did not score as well as other improvement indicators. The review of Graph C15 reveals that two of the interviewees did not feel that the level of empowerment had improved. However, it is evident that the pre-planners felt that the improvement has been significant. This difference in perspective could be attributable to the level of change that the restructure brought about in respect of each role. The level of empowerment may not have necessarily increased in roles that were not significantly influenced or changed through the restructure. The groupings of the transcript comments relating to empowerment are depicted in Interview Analysis 7 of Appendix C. The following empowerment themes were revealed:

- Rules and procedures govern level of empowerment;
- Autocratic versus participative management style;
- Self-worth;
- Accountability

From the analysis of the themes, it is evident that the level of rules and procedures documented and imparted to the staff determines their level of empowerment. In other words, rules and procedures demarcate the boundaries within which staff members are allowed to take decisions. The more defined these boundaries are, the more comfortable staff will be in decision-making and the more empowered they will feel towards making the required decisions. It is evident from the staff interviews that the staff felt that there was a significant improvement in their decision making powers as a result of the introduction of clear rules and procedures. The level of defined rules and procedures is linked to the second theme of autocratic versus participative management style. It is evident from the data gathered that because there were no clear procedures prior to the restructure, the staff had to confront management every time they wanted to make a decision. This is typical of an autocratic management approach and this style clearly inhibits empowerment. However, it is clear that a participative management style, in which rules and procedures are designed and implemented with staff input, has greatly improved the level of empowerment within the department.

Evidence further suggests that empowerment leads to feelings of self-worth amongst staff members because they are allowed both to make and action decisions within the clearly defined rules and procedures. Staff felt that their jobs were more meaningful as a result of having more power to make decisions. Furthermore, there is evidence from the interviews that the increase in empowerment experienced by staff has resulted in improved accountability. Staff felt more accountable for the decisions that they now make.

From this interpretation it is clear that the restructure has brought about a significant improvement in terms of the level of staff empowerment. This increased empowerment has been achieved through the implementation of more structured and detailed rules and procedures within the department and this has improved staff's decision-making confidence. Furthermore, the increase in empowerment has resulted in increased levels of self-worth and accountability as staff see more value in their roles

and their decision-making. Based on this reasoning, the claim can now be made that the restructure has brought about a significant improvement in the staff's ability to make decisions and, hence, has increased the level of empowerment within the department.

7.2.9 Quality assurance (Transcript Code: QA)

As previously discussed in Section 1, quality assurance was introduced to the scheduling department through the restructuring process in order to improve the overall quality of work, or outputs, produced by the department. Key to the success of quality assurance is the staff's buy-in of the process, as well as the continuity of the quality assurance cycle. The researcher, therefore, puts forward the following argument for evidence and testing: The department restructure has brought about dramatic improvements in the quality of work produced as a result of the introduction of quality assurance into the department.

In order to determine the level of improvement in the quality of work as a result of the restructure, the quality assurance, ordinal survey, and interview results will be analysed. Graph E9, Appendix E represents the team quality assurance results for each month and there is evidence of an upward trend. The trend is manifest through a comparison of January and February results with those of June, July and August - the highest scores were achieved in June and August. However, the extent of the upward trend is very limited. The schedulers results (depicted in Graph E11), indicate a downward trend while the pre-planners' quality assurance results (depicted in Graph E10) show a more incremental upward trend. The evidence collected reveals that in terms of quality assurance, the pre-planners level of improvement was the most significant. The results of the ordinal survey conducted with the Field Sales Force (FSF) indicate a positive response to the question statement posed to them during the survey. FSF were asked to respond to the following statement regarding quality assurance: 'Since quality assurance was implemented in the department, the work quality of DCs, schedulers and pre-planners has improved.' Based on the graphed results in Graphs D2 and D3, both retail and commercial sales representatives felt that the quality of work had improved, with Retail's sentiment scoring higher than that of Commercial.

In terms of the interview results (depicted in Graph C1, Appendix C), the improvement in quality assurance scored very high in relation to the other success indicators and across all roles. Review of Graph C16, quality assurance interview scores, shows that interviewees scored 100% in most cases, with the exception of a member of management and a delivery controller. The grouping of the transcript comments relating to quality assurance are depicted in the Interview Analysis 8 listed in Appendix C. The following quality assurance themes were revealed:

- Cost;
- Opportunity;
- Service;
- Personal Improvement and direction;

- Management Style change

From the analysis of the above themes, there is evidence to suggest that the introduction of quality assurance to the department has brought about a reduction in transport costs that are a direct result of the introduction of problem solving options through the delivery controller decision tree (Figure A.13 of Appendix A). It appears that the problem resolution options introduced by the decision tree have provided transport options that are less expensive to the company. It is evident that a direct outcome of introduction of quality assurance to the scheduling department, and the perceived value that it has brought to the organisation, is the possible implementation of this beneficial practice in other departments. It is also evident from the staff's overwhelming response that quality assurance has given them direction in their roles which, in turn, has resulted in a culture of striving for personal improvement. It is interesting to note that the staff's responses reflect a change in management style. Management is perceived as being more communicative and having a friendlier approach as a result of the introduction of the quality assurance cycle.

Based on the interpretation of the graphed quality assurance results and the results of the ordinal survey, it is clear that the implementation of quality assurance, as a result of the department restructure, has brought improvements to the quality of work produced by the department. Moreover, the staff's response to quality assurance has been extremely positive, driving personal performance and resulting in more direction in terms of job roles. In addition it has brought about a more personalised and communicative relationship with management and produced a new more participatory management style in place of previous autocratic one. It is also clear that the FSF have noticed the improvement, which is a key indicator in determining overall department success. Based on all of these factors, the claim can be made that the implementation of quality assurance in the scheduling department has definitely improved the quality of work outputs of the department and has led to a more focussed and interactive team.

In conclusion, therefore, it can be stated that while there has been improvement in customer service as a result of the quality assurance implementation, there is still room for improvement. Management must continue to enhance the quality assurance cycle, ensuring on-going staff feedback and the reinforcing of good practices. Management must ensure that the quality assurance cycle continues to evolve and improve by continually looking for ways to enhance the process in order to continue the upward trend already established.

7.2.10 Technological innovation

In order to drive efficiencies, free up capacity and perform the job more effectively, departments must embark on a process to utilise technology to realise these improvements. Technological enhancements are very expensive but are normally designed to deliver savings through the implementation of more efficient methods. The scheduling department introduced a number of

technological innovations with the aim of improving customer service through department efficiencies, and through evaluation of the success of these, the overall success of the department restructure can be determined. The researcher, therefore, puts forward the following argument for evidence and testing: The department restructure has successfully implemented technological programs that have brought about an improvement in customer service.

During the ordinal survey, the Field Sales Force (FSF) were asked to rate technological innovation improvement based on the statement: 'Scheduling has improved service by harnessing technology through the following systems: SMSing, schedule update on the IVR, CPP, E-schedule and the Pre-plan forecasting tool.' In review of the responses to this question (depicted in Graph D1, Appendix D), it is evident that the FSF responded favourably to the statement. Graphs D2 and D3 indicate that, while both the retail and commercial representatives responded favourably, the commercial rated the level of service improvement, as a result of the technological innovation enhancements, much more highly than retail.

The various technological enhancements implemented in the scheduling department during the restructure are described in detail in Chapter 1, Section 1.1.2 (iii). Figures A18 and A19, Appendix A compare the former Excel spreadsheet that was used by the pre-planners to carry out their stock planning with the new forecasting program that was implemented during the restructure. When these diagrams are reviewed in conjunction with the explanations given in Chapter 1, it is evident that the changes brought about by the technological enhancements have been significant due to the fact that the pre-planners have moved from a manual spreadsheet process to an electronic program that assists them in their planning. Figures A21, A22 and A23 show screen shots of the new electronic schedule. A review of this documents, along with the explanations and advantages discussed in Chapter 1, Section 1.1.2 (iii), provides evidence that suggests this electronic program will also bring about improvements to the whole department, such as a reduction in paper costs, archiving of important data, reporting, increasing resource capacity in the delivery controller role.

An examination of Figure F2, the Cross Pre-planning system, indicates that this system appears to be a major enhancement in terms of order management versus a manual process that required the customer to place a telephonic order with the Customer Service Centre. The evidence collected suggests that the Cross Pre-planning system will have a significant impact in terms of automating the department's processes and procedures. It is also evident that with the implementation of new technology in the department, the scheduling management team has managed to use technology to reduce the number of calls being made by customers to the delivery control team. Graph E3, Appendix E shows the types of calls being received and that the majority are enquiries. However, with the introduction of the automated schedule update voice response, it appears as though enquiry calls received from customers have been diverted away from the scheduling department. Graph E2 shows the number of enquiry calls hitting the scheduling department versus the number of calls hitting the new automated schedule response system. It is evident from the graph that enquiries

being received by the department, represented by the blue line, have decreased to less than the number of calls received on the schedule update system after May. Based on this information, it is evident that management has used technology effectively to further streamline customer service.

After interpretation of the data presented, it is clear that technological enhancements have brought about an improvement in customer service, based upon both the results from the ordinal survey and the review of the types of innovative systems that have been put in place. Furthermore, it is clearly evident that these innovations have also brought about an improvement in the processes and procedures practised in the department. The pre-planners appear to have a more efficient planning system, and the e-schedule and CPP programs will clearly deliver time efficiencies in the day-to-day tasks in the department while enhancing operating procedures. Based upon this reasoning, the claim can be made that the technological enhancements implemented as a result of the restructure have brought about a significant improvement in customer service and have also streamlined procedures and brought about efficiencies in the department.

In order to stay abreast of the competition in the oil industry and to ensure that the department continues to evolve and grow, management must constantly look for new ways of improving the scheduling operation through further technological enhancements. Furthermore, management must ensure that staff do not perceive technology as a threat to their existence and must, thus, educate staff and ensure their acceptance of the new technology. The new technology must always be promoted as an enhancement to staff by indicating its value in terms of their roles in the department.

7.2.11 Reward structure and accolades (Transcript Code: **RWD**)

In Chapter 8, Section 8.2, the topic of staff motivation is discussed and a hypothesis made that, instead of motivating their staff, managers seem to demotivate them. The scheduling manager analysed staff motivation levels extensively through the restructure, and found this theory appeared to be true, namely that managers can only demotivate staff. However, this theory only holds true if a manager is trying to motivate staff directly. It is the scheduling manager's belief that a manager can influence staff motivation indirectly by inspiring feelings of self-worth and belonging in his team. By exposing staff to public rewards, the individuals who are performing well and winning the awards develop feelings of self-worth within the team and this reaction can directly increase motivation in the staff member. This, theory, however, has to be tested. Therefore, the researcher puts forward the following argument for evidence and testing: The department restructure has brought about a reward structure that increases feelings of self worth amongst the staff and motivates them to excel in their positions.

During the ordinal survey, the field sales force were asked to rate the following statement: 'Delivery controllers make a big effort and should be recognised.' An accolade is a term that the scheduling management team has defined for a good service result that is actually recognised directly by the customer. If the customer phones in, e-mails or faxes the department to recognise the staff member for good service, then the management team issues a 'green card' that is then included in the reward

structure and, at the end of each month, these accolades are then recognised publicly. From the review of the ordinal survey results (depicted in Graph D1, Appendix D) it is evident that the FSF felt very strongly that staff should be rewarded for hard work. Based on this result, it is obvious, therefore, that a reward structure is essential in the scheduling department environment. Furthermore, a review of the interview results conducted with the staff (depicted in Figure C1), indicates that there was an overwhelmingly positive response to the questions asked regarding the impact of implementing a reward structure during the restructuring of the department. Graph C17 depicts a 100% score for the implementation of a reward structure. The grouping of the transcript comments relating to rewards are depicted in Interview Analysis 9 of Appendix C. The following reward themes were revealed:

- Competitiveness and Accountability;
- Support for Quality Assurance;
- Motivation through exposure;
- One standard for all;
- Self-worth and Belonging

A high level review of the themes surfacing from the interviews indicates the impact that the reward structure implementation has had on the department. It is evident from the first theme, that the reward structure has heightened competition amongst the staff and, at the same time, has promoted feelings of accountability amongst people. It is also evident that the reward ceremony supports the quality assurance process because staff note their shortcomings during the quality assurance feedback sessions, and then act on these as a result of the reward structure.

The third theme, motivation through exposure, seems to support the original view, that managers can only prevent staff demotivation, as the interview respondents felt very strongly that the reward structure encourages them to work harder. It is also evident from the interview responses that the introduction of the reward structure was a significant change in department procedures because in the past good performance was not recognised. Furthermore, it was mentioned by one interviewee that in the past only the schedulers were taken out to dinner occasionally while other roles were excluded from this privilege. So there is evidence to suggest that the reward structure has brought about a universal reward standard across all roles. The final theme, self-worth and belonging, appears to be the 'motivation enabler'.

From the researcher's interpretation of the data collected, it is clear that the introduction of the reward structure during the department restructure has been a resounding success and has contributed extensively to staff well-being, in terms of their sense of belonging and self-worth. Moreover, the reward structure has clearly resulted in competitiveness amongst staff, increased accountability and, most importantly, has had a significant impact on improving the staff's motivation and drive for work within the department. It is also clear that the reward structure's extensive success is due to the fact that it was implemented on a zero base, from no reward or recognition to

complete exposure for top performance. Therefore, it can now, indisputably, be claimed that the introduction of the reward structure through the department restructure has been a resounding success which has resulted in increased feelings of self-worth that have motivated staff to work even harder. The action required by the management team in future is to ensure that the reward structure does not negatively affect motivation or morale amongst staff members who are consistently excluded from the awards ceremony, due to their poor competency levels in relation to the top performers. In order to prevent this happening there should be as many opportunities as possible for less competent staff to win awards through the inclusion of special recognition awards for special one-off contributions. Quality assurance coaching should also be introduced in order to bring under performing individuals to the desired competency level.

7.2.12 Contractor management (Transcript Code: CM)

The most significant problem facing any centralised scheduling department is the negative impact of poor transport contractor performance on the department. The transport contractors are required to implement the schedules produced by the department by effecting deliveries to the customer as per the plan. Failure to do so results in pressure being placed on the department. If the transport contractors fail to deliver the specified loads, this results in the generation of more customer calls into the department, thereby negatively affecting the inbound service levels. This increase in incoming calls forces the department to call out more frequently in order to keep the customer informed. Consequently, problem solving becomes more frequent. If failed loads are not resolved through the problem solving decision tree they must then be re-accommodated by the scheduler on the next shift. It was imperative, therefore, that the restructure should result in greater focus being placed on contractor management, so as to minimise delivery failures to customers. Based on this, the researcher puts forward the following claim for evidence and testing: The department restructure has brought about improvements in the way that the department manages contractor performance.

Review of Graph C1, Appendix C, indicates that the influence of the restructure on contractor management and performance has been very positive. However, a review of Graph C17, reveals that, while all interviewee responses were positive, not all interviewees felt that the change has been significant. The grouping of the transcript comments relating to contractor management are depicted in Interview Analysis 10 of Appendix C. The following contractor themes were revealed:

- Contractor conformance;
- Awareness and accountability through reporting;
- Empowerment;
- Working together;
- Renewed customer focus

From the review of the above themes, it appears as though the restructure and subsequent focus on contractor management has led to increased contractor conformance to the rules. The restructure was responsible for the inception of the reporting functionality. This process has enabled the

scheduling department to create more awareness and accountability through the reports that are generated daily by the department.

Furthermore, the culture of accountability seems to extend to the staff within the department as well, because staff are able to engage the contractor management directly. As a result of this new communication channel, they feel obliged to act if something goes wrong. Empowerment of staff since the restructure seems to have increased dramatically since management has promoted direct contact with contractors and encouraged staff to deal with problems directly. Before the restructure, it was evident that the autocratic style forced staff to bring the contractor problems to management and, consequently, no action or follow up was taken. It is also evident from the analysis that since the restructure, there has been an improvement in the relationship between contractors and scheduling staff. It appears as though they are now working more closely together because the scheduling department's customer service focus influences the contractor to take a more customer-focussed view of the operations as well.

It is clear from the interpretation of the data that since the restructure there has been some improvement in contractor management. It is also evident that the scheduling staff are now more empowered to address problems directly with the contractors than in the past. This fact, coupled with the full reporting system adopted by the department during the restructuring process, has resulted in greater awareness of problems related to contractor performance and their mitigation,. It is also clear that through a combination of staff empowerment and daily reporting, contractor conformance has improved and this has strengthened the relationship between the contractors and the scheduling department. The claim can now be made that, although the improvement in contractor performance has not been significant, it is clear that the restructure has succeeded in achieving a more focussed approach to contractors, thereby, enhancing their performance. In terms of future developments, it is critical that the scheduling management team continues to strengthen its relationship with contractors because of the negative impact that poor contractor performance has on the department. The management team needs to seek out new ways of reporting and influencing their performance. With reference to the proposed launching of e-schedule program, this program should have a very positive impact on contractor conformance because of the more detailed focus that it produces.

7.3 Summary of the level of success achieved

Each service improvement indicator has been critically evaluated in order to determine the level of success of the department co-location restructuring process. It is now important to assess how successful the restructure has been. The results of this evaluation define the level of success and, thereby, directly address the first part of the research question raised at the beginning of the research process, namely, is it possible to improve the service delivery of a department by physically restructuring the department roles into co-located teams and team procedures.

In terms of inter-role communication, the cluster cell teams formed clearly improved communication very effectively. The crucial communication interaction between schedulers and pre-planners has been enhanced through a new seating position that lends itself to improved quality of outputs. The restructure has brought about impressive improvements in communication between management and staff as well as improving management accessibility thereby breaking down barriers between management and staff. With reference to the fundamental question it is clear that the improved inter-role communication has come about as a result of the formation of co-located cluster teams and will therefore promote the future sustainability of the department. Furthermore, through the improvements in communication between the roles, the quality of outputs has improved thereby supporting an overall improvement in customer service. As identified, there is still inter-role improvement required between delivery controllers and the other roles in the department and management will need to focus on initiatives in order to ensure this into the future.

The inter-role communication improvements are supported extensively by the move to an open plan cluster layout. However, while the move to an open plan has brought about these improvements in inter-role communication, the noise levels are a significant problem and do not necessarily support improved quality of work. Having said this however it is clear that the open plan concept supports improvements in inter-role communication but may negatively affect quality of work outputs, particularly with the schedulers. Therefore, while the open plan structure should promote future sustainability, it may hamper the quality of schedules and therefore cannot be viewed as completely supporting improvements in customer service. Consequently, management will need to continue to focus on ways to reduce the negative effects of an open plan layout on the quality of outputs produced.

The formation of cluster teams has resulted in a good environment for expertise building amongst staff. It has also brought about improved focus; teamwork and quality of work produced and, hence, supports a successful restructure through co-located cluster team application that has resulted in an improvement in customer service through better team communication. Cluster team implementation in the scheduling department environment, therefore, promotes the future sustainability of the department.

While inter-role communication has improved extensively as a result of cluster team and open plan implementation, the department's inability to answer the customer's calls at an acceptable level is a serious set back to restructure success. While it is clear that the introduction of direct access to the department has resulted in improved customer service, the inability of the department to handle call demand during peak times seriously undermines the service improvements gained. The inbound service level issue facing management must be resolved if full restructure success is to be realised. However, direct communication supports the co-location cluster cell concept as a model for improving service delivery because communication with the customer has been extensively

enhanced. The direct access implementation as a result of the restructure supports problem solving because it has resulted in an environment for live resolution of a problem and this is a significant customer service improvement.

When looking at problem solving improvements, the change has been extensive. Improvements in quality and feedback timing as a result of live resolution strongly supports restructure success and are testimony to cluster cell implementation because the delivery controller's level of problem solving ability is governed by an ability to effectively interact with the other roles in the department. It is also through the improved communication, brought about by direct customer access, that problem-solving improvements have been so profound. However, it is clear that management must prevent the resultant customer manipulation of the problem solving process that has now been established in the department because this strategy could cost the company money.

The comparison conducted between the UK and SA scheduling departments further supports the communication improvements. It is clear from the results that the restructure of the SA department has brought about improved and more efficient communication channels with a far greater ability to handle customers' inbound calls and delivery problems than the UK department. However, the comparison revealed that the SA scheduling department is less advanced in terms of technological innovations/enhancements. Furthermore, the UK depot's greater efficiency in terms of delivery and gate-to-gate turn around time results in fewer scheduling problems. Therefore, the SA scheduling department's focus on the root cause of delivery problems is imperative in order to reduce the number of problems being received by the department. Therefore, the global best practice results show an impressive improvement in communication channels and thus support a successful restructure in ensuring future sustainability. Role clarity in the SA scheduling department has been improved significantly as a result of the quality assurance focus on role tasks. Staff now have a clear understanding of what is expected of them and this knowledge has not only improved their effectiveness in their roles but also their overall work quality and service to customers. This constant role clarification has resulted in the establishment of more robust roles and, in the case of delivery controllers and pre-planners, has brought about changes in role definition that have enhanced the roles considerably. Therefore, role clarification supports cluster cell implementation and restructure success. Role clarity has also set boundaries for empowerment and the restructure has brought about significant improvements in empowerment as a result. The empowerment of staff has resulted in more creative problem solving techniques and more focus on getting the job done, which has resulted in improved customer service. Empowerment has been enhanced by the cluster team implementation as a result of the more clearly defined processes and procedures that delimit the empowerment boundaries, giving staff confidence to act.

The introduction of quality assurance has also had a dramatic impact on the quality of work produced in the department and this has led to improved service to customers. The quality assurance cycle

has resulted in improved communication feedback to staff that has enhanced staff's understanding of where they are going wrong, and what they need to do to improve individual performance. Quality assurance implementation therefore supports restructure success by improving communication and customer service through enhancing the quality of outputs.

From the evaluation, it is clear that the scheduling management team has effectively implemented technology to improve customer service. SMS notifications, automated schedule voice response, a pre-plan forecasting program and the e-schedule program are all innovative programs that contribute to an improvement in customer service. The technology implemented in the scheduling department has also contributed to a more streamlined operation through its contribution to more efficient processes and procedures. As a result of these technological advances, communication to the customer has been enhanced extensively.

The implementation of the reward structure has brought about a more focussed team, a team with feelings of self-worth and a desire to achieve. The rewarding of staff for achieving accolades from customers is significant as it clearly drives the staff to want to achieve more thereby improving problem solving and hence, customer service. Therefore, the reward structure supports restructure success and has contributed significantly to service improvement. In terms of contractor performance, it is clear from the evaluation that, if contractors are not implementing and delivering the schedule effectively, the negative impact on the scheduling department can be significant, as a result of more inbound customer calls, more problems, more delivery failures to be re-accommodated, etc. What the restructure has done however is to ensure more focus on contractor performance through empowerment and reporting and this has had a positive impact on customer service. The empowerment of staff through the renewed contractor performance has resulted in direct communication with the contractor and this improved relationship, coupled with the reports sent to contractors, has improved communication overall. Communication has been further enhanced through the focus of the cluster teams on department specific areas, and thus supports the co-location restructuring as a means of ensuring the future sustainability of the department. However, although the scheduling department's focus on contractor management has radically improved customer service and communication, the overall success of the department restructure is still threatened because of the department's failure to completely control the contractor management.

Based on the outcome and interpretation of the data in this Section, the researcher depicts the results of the restructure in terms of a traffic light report (a term used in industry describing a report with traffic light indicators denoting areas requiring focus) as depicted in Table 7.1 below. Table 7.1 clearly shows the successes as well as the gaps that require future management action and presents the final outcome of the restructure based on the fundamental question raised in Section 1.

| SERVICE IMPROVEMENT INDICATORS | FUNDAMENTAL QUESTION | | | |
|--|------------------------------|---|---------------------------|------------------------------|
| | OVERALL RE-STRUCTURE SUCCESS | WILL ENSURE FUTURE SUSTAINABILITY OF THE DEPARTMENT | COMMUNICATION IMPROVEMENT | SERVICE DELIVERY IMPROVEMENT |
| Inter-Role Communication / interaction | ■ | ■ | ■ | ■ |
| Open Plan | ■ | ■ | ■ | ■ |
| Cluster Team | ■ | ■ | ■ | ■ |
| Communication with Customers | ■ | ■ | ■ | ■ |
| Problem Solving | ■ | ■ | ■ | ■ |
| Global Best Practice | ■ | ■ | ■ | ■ |
| Role Clarity | ■ | ■ | ■ | ■ |
| Empowerment | ■ | ■ | ■ | ■ |
| Quality Assurance | ■ | ■ | ■ | ■ |
| Technological Innovation | ■ | ■ | ■ | ■ |
| Reward Structure | ■ | ■ | ■ | ■ |
| Contractor Management and Performance | ■ | ■ | ■ | ■ |

Table 7.1 Traffic light report - Restructure success

The results indicate that the restructure of the scheduling department based on role co-location changes has been a success across most of the improvement indicators. Inter-role communication has improved through the implementation of cluster teams and the open plan office which, in turn, has contributed to the improvement in the quality of department outputs, particularly the superior schedules that are a direct result of closer scheduler and pre-planner interaction. The cluster team implementation has also brought about a dramatic improvement in teamwork and specialisation of roles. The introduction of direct access by customers has resulted in a significant improvement in problem solving because an environment for live resolution has been created and this new setting has contributed significantly to an improvement in service delivery. An improvement in role clarity has led to superior work output and quality and has also contributed to enhanced service delivery. Technological innovation has resulted in an improvement in customer communication, thereby, further enhancing service delivery. The reward structure has resulted in an improvement in the number of staff performances to achieve accolades. Focus on the transport contractors through regular reporting has positively influenced contractor performance.

Collectively the restructure success outcomes have successfully addressed the original concern regarding the future sustainability of the department. It can be stated without question that the changes made to the department, both structurally and procedurally, have resulted in a department that is delivering a more effective service to customers. Based on the diversity of successes achieved through the restructure, role co-location changes can effectively be used as a basis for restructuring in order to bring about the desired improvements in service delivery of a department. Furthermore, the model will be effective as a restructuring model in other departments in the

business where people are required to work as teams in which inter-role communication and physical positioning of roles are critical.

However, the evaluation process, interview and ordinal survey results also exposed certain concerns as a result of the restructuring that, if left unattended by management, may threaten the future sustainability of the department. The data exposed the following key focus areas:

- Communication/interaction between delivery controllers and the other roles still requires focus in order to further improve the quality of service outputs;
- Noise, as a result of open plan structure, may negatively affect the quality of service delivery outputs by the department, namely the quality of schedules and problem solving techniques;
- The poor inbound telephone service levels threaten the success of the department into the future and the perception by the customer of the service provided by the department;
- Customer problem solving decision tree manipulation by customers as a result of their knowledge of the problem solving process;
- Contractor non-conformance is still continuing unchecked despite the reporting improvements. This practice may lead to a negative perception of the overall performance of the scheduling department, thus threatening its future sustainability.

7.4 Conclusion

In conclusion, the critical evaluation of the data gathered by the researcher clearly exposes the level of success achieved by management in bringing about the desired improvements in service delivery, through the implementation of the co-location restructure of the scheduling department.. The outcome of the researcher's data evaluation is described extensively and defines the co-location restructure as having been successful in bringing about an overall improvement in service delivery by the scheduling department, thereby ensuring the scheduling department's sustainability into the future. The evaluation process also revealed key focus areas that require urgent attention by management. These focus areas will result in the future disbanding of the department if management does not address them. Therefore, the evaluation process, and the outcome thereof, adequately addresses the concern by successfully answering the first part of the research question, namely: Is it possible to improve the service delivery of a department by physically restructuring the department roles into co-located teams and team procedures?

The critical evaluation of the success of the co-location restructure has satisfactorily answered the first part of the research question posed. However, as previously mentioned, department sustainability is equally dependant upon management's ability to maintain staff motivation and performance levels during and beyond the restructure. Therefore, the research process must continue in order to identify the formula for maintaining staff motivation and performance.

In the section to follow, the researcher makes use of the critical incidents that he logged during the departmental restructure, in order to satisfactorily address the concern regarding the impact of staff motivation and performance levels on the future sustainability of the department. He does this by framing a hypothesis for restructure that will counter a reduction in motivation and performance during restructuring. In so doing, the researcher will adequately address the second part of the research question posed.

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PART VII

HYPOTHESIS OF RESTRUCTURE

CHAPTER 8 – FORMULATING A HYPOTHESIS

8.1 Introduction

With reference to the original concern, it was stated that if motivation and performance levels are not maintained during the restructure, this might threaten the future sustainability of the department. If staff motivation and performance declines as a result of the change process, then this will negatively impact the quality of service delivery outputs by the department. Based on this concern, the researcher introduces a hypothesis for change that, through understanding of the factors that negatively influence staff motivation and performance, can prevent a decline in motivation and performance levels as a result of the change process.

As a basis for a hypothesis of restructure, the researcher completed six critical incident logs during the course of the restructuring process. From the critical incidents, key learnings were documented as a basis for the formulation of a hypothesis of department restructuring. The learnings that formed the basis for formulating the hypothesis are listed in Table 1 of Appendix G. The key learnings were then categorised into an interrelationship diagram and then translated into a causal loop diagram. The causal loop diagram (depicted and described in detail in the section to follow) will provide the answer to the second part of the research question posed: Maintaining staff motivation and performance levels in order to ensure department sustainability into the future.

In the section to follow, the hypothesis for successfully restructuring a department without negatively affecting staff motivation and performance is described in detail. The focus of the discussion is on the relationship between motivation and performance and the trends observed by the researcher during the restructuring process.

8.2 Staff motivation and performance

Before describing the hypothesis of restructuring, it is important to first touch on the relationship between staff motivation and team performance in order to put this into context as a basis for hypothesis formulation.

Synonyms for the word motivation are incentive, enthusiasm, drive, and inspiration. Ensuring that staff are kept motivated during a change management process with the same extent as the scheduling department restructure is a significant challenge for any manager. In fact, it is questionable whether a manager can positively influence motivation levels, particularly during a time

of change when the level of motivation of staff members may be determined by factors outside of the manager's control or even outside the workplace. A staff member, who is highly motivated, may be so as a result of some positive personal event that may have taken place in his or her life. Similarly, a staff member who is experiencing a difficult period in his or her life may undergo a low level of motivation in the workplace. In this case a manager has no influence on the personal problem and, therefore, will not be able to influence the employee's level of motivation. Scholtes (1998:37) offers an interesting and strong viewpoint regarding a manager's ability to motivate staff members. Scholtes insists that managers cannot 'infuse' staff with motivation and believes that managers who think they can are conceited. Instead, Scholtes (1998) proposes that managers can, in fact, only demotivate.

Synonyms for the word perform are act upon, carry out, and action. The interrelationship between staff motivation and performance is unquestionable. During the restructuring process the researcher observed that in many instances when staff were motivated their performance appeared to improve. If a staff member is demotivated, regardless of the reason, the individual will find it very difficult to perform well in the workplace. The scheduling manager was in danger of reducing performance levels by demotivating staff during the scheduling department restructuring process because of the significant changes that took place. Prior to the implementation of the restructuring process, the scheduling manager acknowledged that if the staff members' motivation was negatively affected, this could have a negative impact on the department's performance and, hence, the restructuring process would not improve service delivery outputs. Therefore, it was imperative for management to embark on a restructuring process that would deliver results while having minimal impact on staff motivation and their subsequent performance. This would not be an easy task in light of the theory put forward by Scholtz (1998) that managers cannot motivate their staff.

8.3 Hypothesis of department restructuring

In defining the hypothesis of restructuring, the researcher focused on the learnings derived from the restructure process and documented the learnings from the logged critical incidents during the restructuring process. The hypothesis of restructure is depicted in Figure 8.1 below in the form of a Causal Loop Diagram.

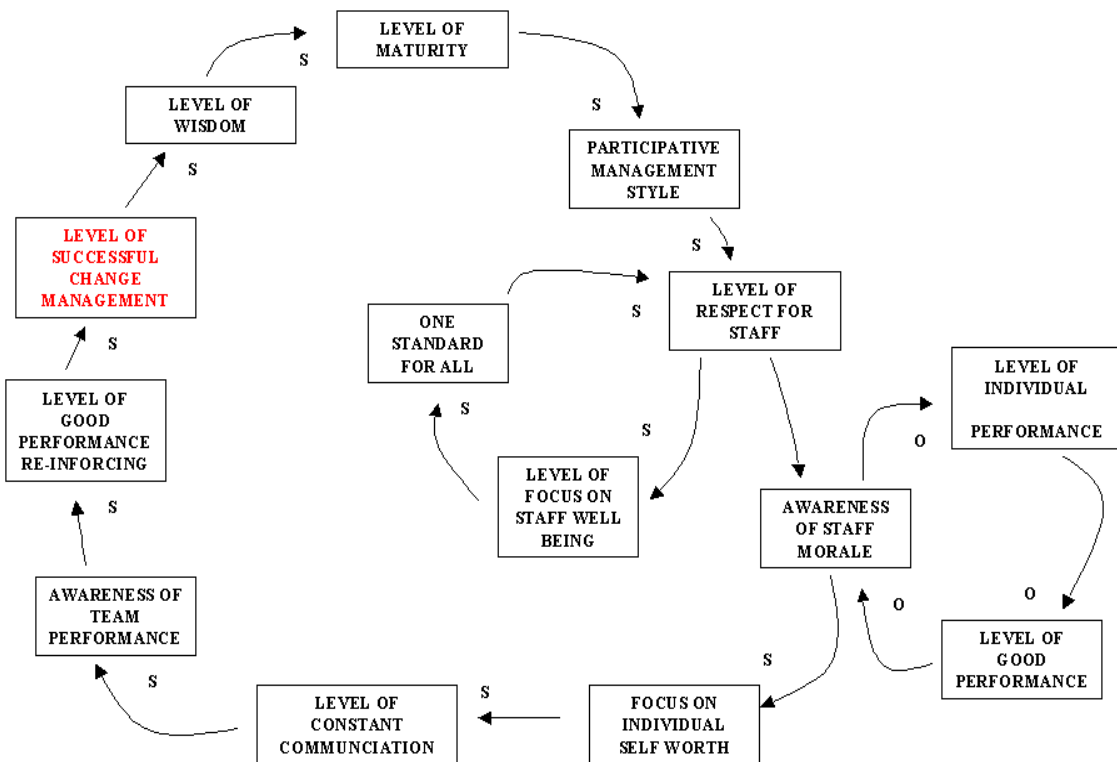


Figure 8.1 Causal loop diagram: Hypothesis of restructure

The hypothesis of restructure begins with the level of maturity of the manager and the management style that he/she adopts when approaching the department restructuring change. A manager who approaches any change management process with a level of maturity that defines an autocratic or dictatorial management style, will fail ultimately. This is because the success of any department restructure will be determined by the people being affected by it and how they perceive the change. Having stated this, it is clearly evident that level of success of the restructure will be determined by the manager's level of maturity towards the change management process. The manager's approach must be one of full engagement with the staff who are affected by the changes being embarked upon. This can be realised through a participative management approach. Participative management requires a manager to involve his/her staff in the change management decisions, by allowing them to give input on the proposed changes and to voice their concerns and perceptions of these before they are implemented. Constant communication between the manager wanting to action the required changes and his staff is imperative. Therefore, the level of maturity of the manager embarking on the change management process will determine the level of participative management style practiced and, hence, determine the impact on the motivation and performance of staff affected by the change. A high level of maturity thus leads to a high level of participative management style because the manager constantly engages his or her staff and allows participation in the decisions made regarding the changes required. Furthermore, the level of participative management engagement by the manager determines his/her level of respect for the staff reporting to him/her. A manager, who embarks on a restructuring process with an autocratic or dictatorship management style, will portray a lack of respect for the views, beliefs, perceptions and

well-being of the staff. Moreover a manager with an autocratic or dictatorship style towards the restructuring process will forego any ideas or initiatives that the staff may have. Therefore, a high level of participative management style will result in a high level of respect for staff, their ideas, concerns and perceptions about the changes to take place. Scholtz (1998) talks about the importance of trust by managers. He proposes that an understanding of people and relationships requires an understanding of trust between a manager and his/her staff. Scholtz (1998) mentions that trust requires the coexistence of both the beliefs of the manager and the beliefs of the staff regarding the change process. Scholtz (1998) insists that if staff believe that they are trusted and that the manager cares about their well being, then they in turn will trust the manager. Therefore, a manager embarking on a major change process gains his/her staff's trust, he/she will surely fail. Constant participation and feedback will enhance staff's understanding of the change management process and strengthen the relationship with their manager and will ultimately result in trust and success. The causal loop diagram (depicted in Figure 8.1 above) indicates that the level of respect for staff promotes the level of staff well-being which, in turn, results in one standard for the entire team. In essence, the interrelationship between respect for staff, staff well-being and one standard for all, builds trust in staff. Staff trust is pivotal in realising success and, hence, central to the hypothesis of restructure. Therefore, it can be stated that without trust, the motivation and performance of staff will decline as a lack of staff trust reduces staff 'buy-into' the change process, and, in the case of the scheduling department restructure, lack of trust will ultimately end in restructure failure.

A manager who is embarking on a participative management approach to a restructure should communicate frequently with his/her staff. This will also result in a greater awareness by the manager of staff motivation levels during the change management process because he/she continuously engages staff with ideas and changes and is exposed to possible negative comments and views by the staff. Therefore, a high level of participative management style will result in a high level of respect for staff and their requirements which, in turn, will result in a high level of awareness of staff motivation by the manager. Awareness by the manager of the level of team and individual staff motivation will influence the level of self-worth that a staff member feels towards the team and his/her manager. This, in turn, will determine the level of performance of a individual staff member. During a significant change management process, people affected by the changes, may feel vulnerable as a result of the 'unknowns' associated with the change process. This may result in nervousness and insecurity about the change process and result in staff being constantly aware of the manager's every move. The manager's actions may be constantly monitored by the staff and, thus, if staff perceive that the manager is embarking on the change process on his/her own without thought or concern for the individuals whom he/she is affecting, this could lead to feelings of low self-worth and an increase in the level of individual poor performance. Therefore, it is crucial that managers who embark on a department restructure are constantly aware of staff motivation levels. They should focus on ensuring that each staff members experiences a sense of belonging to the

team and to the change process, through a process of constant communication, interaction and idea sharing. In this way, a manager can ensure a reduction in the level of individual poor performance which will improve the level of team performance and produce quality service delivery outputs that may lead to the future sustainability of the department.

The manager's awareness of staff motivation, the level of individual poor performance and the level of good team performance will culminate in a continuous, fluctuating closed cycle of team performance. During the restructure, the researcher noted cyclical fluctuations in staff motivation, resulting in fluctuations in individual poor performance which, in turn resulted in collective team performance fluctuations. This fluctuating motivation-performance cycle is depicted in Figure 8.2 below.



Figure 8.2 Motivation - Performance cycle

This cycle can be either negative or positive. For example, if a manager has a low awareness of staff motivation then low levels of motivation will go unchecked, resulting in increased individual poor performance, leading to a decrease in team performance. Similarly, if a manager has a high level of awareness of staff motivation this, in turn, will cause a reduction in individual poor performance because awareness by the manager leads to interaction with staff that, in turn, will counter poor performance through staff engagement and idea sharing and, eventually, lead to an increased level of team performance. Therefore, the manager's approach to the restructure and his/her awareness of staff motivation will determine whether the motivation-performance cycle has a positive or negative trend.

In light of the arguments presented in the paragraph above, the link between motivation and performance (described through this cyclical relationship) begins to answer the question posed earlier in this chapter, namely: how does a manager prevent a reduction in staff motivation during a department restructure? Scholtz (1998:43) defines benevolence as: 'the extent to which staff

believe they are cared for and supported by their manager'. The number of people exhibiting a sense of benevolence during a restructure will, therefore, increase if the management style focuses on self-worth. A manager who constantly focuses on the individual self-worth of his/her staff during the restructuring process by positively reinforcing benevolence, will ultimately increase the level of constant communication interaction with his/her staff. The greater the communication with staff, the greater the manager's awareness of the team's overall motivation and performance. Focus on overall team performance will result in the manager's ability to reinforce good performance through reward, when good performance becomes easily visible. This will result in an increase in the success level of the restructure or change management process because the manager constantly counters a reduction in motivation. With every restructure that a manager initiates, experience is gained which ultimately leads to an increase in the level of personal wisdom that will, in turn, contribute to a manager's level of maturity.

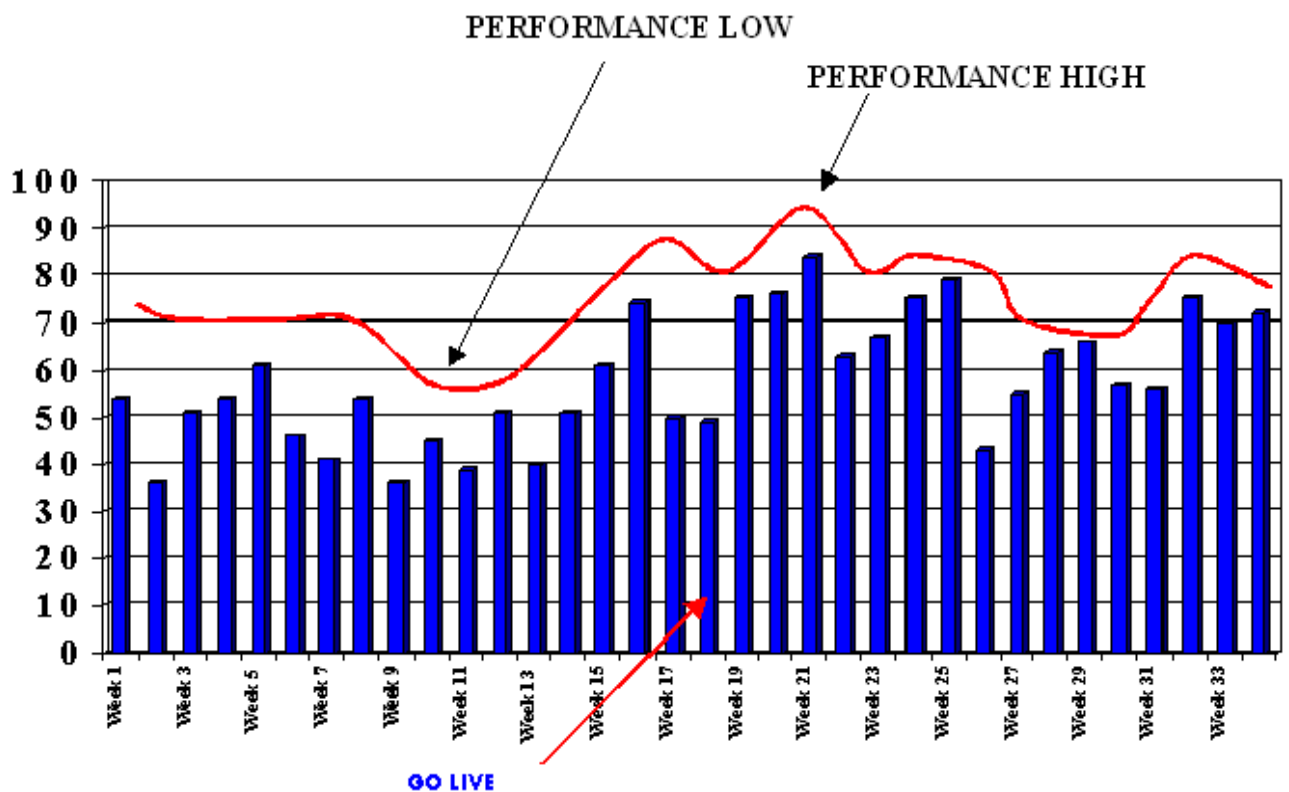
The practical applications that can be derived from the hypothesis of restructure, listed below, are extensive and define the formula for ensuring a successful department restructure. The following key applications are thus identified through the hypothesis:

- A manager should approach the restructure with maturity towards the change process knowing that the restructure being embarked upon is a collective team effort involving all members of the team;
- A manager should practice participative management at all times ensuring that staff are engaged and fully integrated into the proposed changes, allowing them to provide input and share ideas and concerns;
- A manager should build trust with staff through constant focus on staff well-being, by displaying competence and by showing confidence in staff at all times;
- A manager should show respect for staff by caring for their disposition during the restructure process;
- A manager should practice one standard for all members of the team, so that there is no favouritism or double standards practice during the restructure that may lead to individual demotivation and poor performance;
- A manager should constantly monitor staff motivation levels and address any motivation issues with staff ensuring that demotivation through the restructure is kept to a minimum;
- A manager should constantly communicate with staff throughout the restructure. Hold regular progress meetings and workshops to draw in new ideas and answer concerns raised by staff thereby ensuring staff participation throughout the change process;
- A manager should continuously reinforce good performance so as to instil a culture of good performance in the team during the restructure;
- A manager should always apply wisdom and experience drawing on past successes and taking decisions based on positive historical outcomes to drive the restructure process and ensure beneficial decision-making to both the staff and the company.

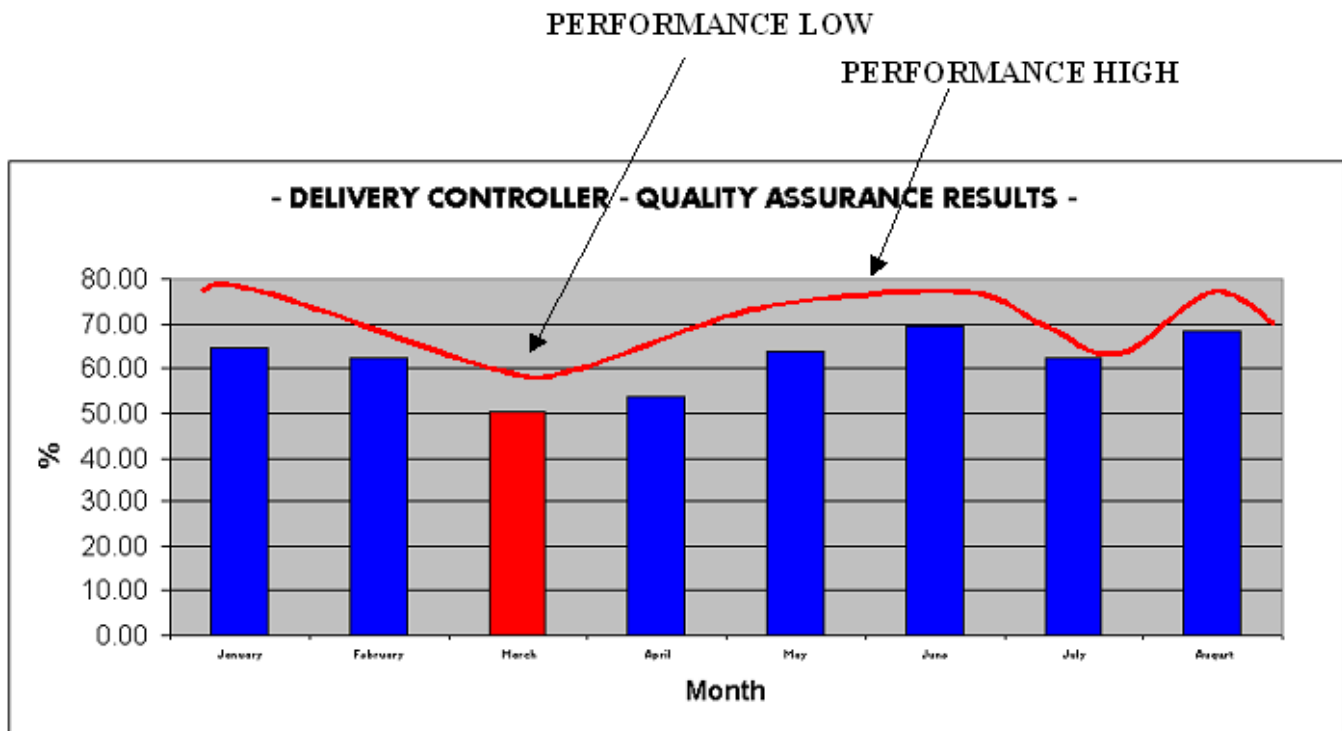
From the motivation-performance cycle, a model of performance efficiency emerges, supported by the graphed data gathered during the restructuring process. When graphing motivation to performance over time, these performance fluctuations are clearly visible in the data and are described in detail in the section to follow.

8.4 Performance over time born from data and observation

The fluctuations observed by the researcher during the restructure (mentioned earlier) warrant closer analysis because these are key to ensuring the future sustainability of a department that has undergone a significant restructuring or change process. By analysing the data graphs in Appendix E and then applying the motivation-performance cycle (discussed in the previous section) to these results, the motivation-performance cycle fluctuations of the department becomes clearly visible. In every element of the department, the performance of the department fluctuates, moving through performance highs and lows. This is depicted in the quality assurance graphs that measure the performance and conformance by staff to the desired quality of work outputs by the department. These performance fluctuations are depicted in Graphs 8.1 to 8.3 below and denoted by the red line.



Graph 8.1 Inbound delivery control service level performance cycle



Graph 8.2 Delivery controller quality assurance performance cycle



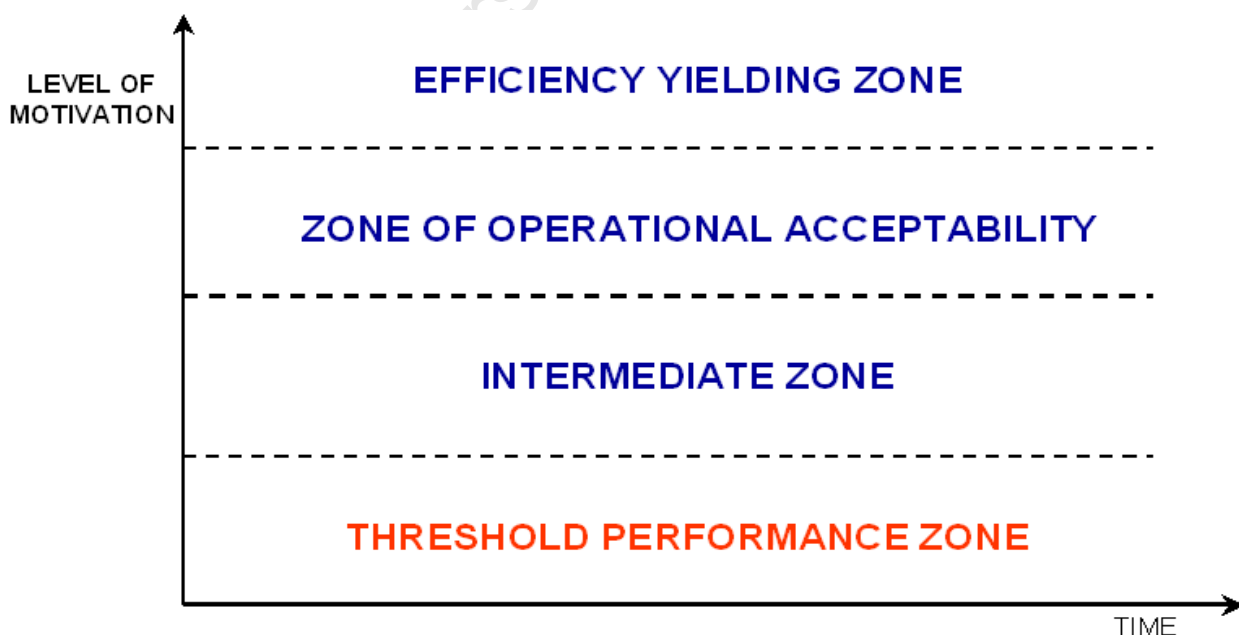
Graph 8.3 Pre-Planner quality assurance performance cycle

It is known that many factors influence the level of performance of a department by determining the extent of the performance highs and lows. However, what is important to the researcher throughout this research process is an analysis of those fluctuations that took place during the restructure of the scheduling department. As previously discussed, the motivation-performance cycle is on-going and can be negatively influenced by the manager. Furthermore, a manager who is able to positively

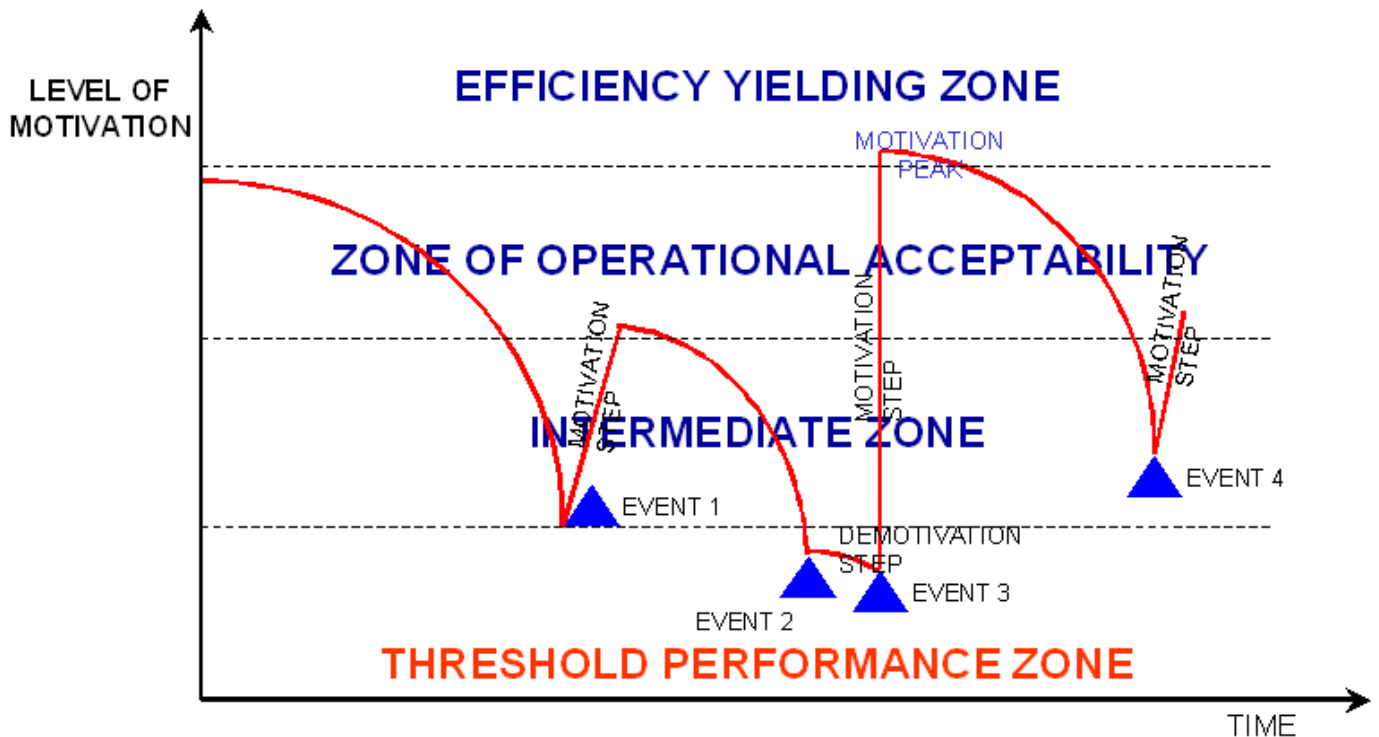
influence the cycle by preventing reduction in motivation of staff will, in turn, encourage performance peaks. In the section to follow, the management of the motivation-performance cycle is defined and discussed in detail, both from the data gathered and the researcher's observations during the restructure of the scheduling department.

8.5 Motivation-performance cycle

The relationship between staff motivation and performance has been defined in detail as a result of the emergence of the hypothesis of restructure and the embedded motivation-performance cycle. Moreover, when staff motivation levels increase, the result is an overall increase in team performance. This performance-motivation cycle can be defined in more detail in an attempt to define 'boundaries' for such fluctuations in performance that are a result of motivation changes and the possible effects on the department's future sustainability that are a result of the extent of the fluctuation. By graphing the level of motivation over time, certain levels of team performance are identified, as shown in Graph 8.4 and 8.5 below. The time on the x-axis can be defined, as an interval in time of one day, or it could be indefinite (the duration of the life of the department), while the Y-axis denotes the level of collective staff motivation. When the level of motivation increases or decreases, so the department performance levels change. When motivation levels are low, the department achieves a level of performance in the threshold performance zone and when motivation levels increase, so performance increases through the intermediate performance zone, to the zone of operational acceptability and eventually moves up to the highest performance level, the performance efficiency-yielding zone. An example of the staff motivation-performance cycle in action is depicted in Graph 8.5, below.



Graph 8.4 Defining performance Levels



Graph 8.5 Motivation-performance cycle

This model proposes that a department's performance begins on a certain level and as motivation levels slowly decline for whatever reason, the performance of the department slowly drops through the defined performance levels. The threshold performance level is defined as a performance level on which the department will begin to endanger its very existence. If the department remains at this level, the department will eventually cease to exist, because the performance level is no longer justifiable. Prior to the scheduling department restructure, the department can be said to have been at threshold performance and an event was needed in order to ensure department existence and sustainability into the future. An event is defined, as any action that takes place within the department that would result in a motivation level step upwards which pushes the performance level of the department to a new level. It could be defined as something as large as a department restructure, or something as small as a discussion with an individual staff member about his/her poor performance that ultimately improves the overall team performance.

The graph depicts motivation steps leading to increased performance levels. However, it also shows a demotivation step as a result of event 2 on the graph. Earlier, it was said that a manager can influence the motivation of staff only by countering a decline in motivation. Therefore, the challenge facing all managers, irrespective of whether they have embarked on a change process with their staff or not, is that they must continuously work to ensure actions or events that promote a motivational step and, consequently, a move upward into a higher performance level. Furthermore, by applying the requirements for ensuring a successful department restructure, a manager can ensure that a motivation step is achieved, as in the case of event 1, as opposed to a demotivation

step in the case of event 2. The intermediate zone is defined as the zone of performance that will ensure short-term sustainability of a department. A department performing in this zone will have an uncertain future and this may mean short-term sustainability but will, ultimately, cease to exist into the future. The zone of operational acceptability is defined as the performance level in which a department is sustainable indefinitely; a performance level that delivers what the department is required to deliver. The efficiency-yielding zone is defined as the level of performance in which a department begins to achieve efficiencies that result in department growth, expansion and continuous improvement.

An example of the motivation-performance cycle in action is as follows: A manager chooses not to engage his/her staff throughout the change process. When staff gradually become more insecure, because their self-worth drops and their trust of their manager drops, so their motivational levels begin to drop over time. Suppose, for example, that the manager then decides to engage the staff in the change process and he/she calls a workshop for a day. During the workshop, the manager discusses the change process in detail and attempts to reassure the staff by allowing them to participate in the change through idea sharing and addressing their concerns and answering their questions. This meeting is denoted on the graph by an 'event'. The workshop ends and the staff go back to work. As a result of the successful meeting, coupled with the fact that they have regained their trust and self-worth, the staff motivation levels rise, creating a motivational step that, in turn, results in a new level of performance, higher than that prior to the workshop. The cyclical fluctuations in motivation-performance continue until the next event takes place, and so on. In this particular situation, the manager has not managed to increase motivation levels but has managed to influence them through a successful workshop with his/her staff.

8.6 Conclusion

In this section, the hypothesis of restructure was developed through the research process outcome and described in detail in the above paragraph. In attempting to answer the issue of staff performance and motivation levels, the hypothesis of restructure has defined the motivation-performance. With reference to the research question posed, the richness of the hypothesis has adequately addressed the fundamental question. The hypothesis of re-structure provides a 'recipe' for managers who want to embark on a change process that could influence staff motivation and performance.

It would appear that if a manager wants to ensure ultimate change management success, or success of an event such as a full departmental restructure, he/she needs to spend a considerable amount of time ensuring that demotivation steps, as depicted in Graph 8.5 above, are kept to a minimum, thereby positively influencing performance upwards. This can be achieved through maturity, respect and participative approach towards staff, awareness of motivation and

performance levels, trust building, communication, and reinforcement and by applying personal wisdom.

In conclusion, the hypothesis of restructure addresses the original concern regarding the future sustainability of the scheduling department by adequately answering the research question posed at the beginning of the research journey. By applying the learnings from the hypothesis of restructure, a manager can maintain staff motivation and performance levels at a point that will ensure that the department continues to provide a high standard of service delivery during and post restructuring, ensuring future sustainability of the department. In the section to follow, the researcher reflects upon the research journey undertaken and provides a personal account of his experience during the research process and what it has meant to him personally.

University of Cape Town

PART VIII

REFLECTION

CHAPTER 9 – THE RESEARCH JOURNEY

9.1 Introduction

The research journey began with a problem situation requiring urgent focus through research. The management team of a leading international oil company faced a dilemma with the scheduling department that was failing to offer an effective delivery service to the required standard. The concern was identified as: Failure by management to (a) improve the service delivery of the department, through the physical restructuring of roles into co-located teams and procedures, and (b) maintain staff motivation and performance levels during the restructure, will result in the restructuring project being a costly waste of time and will threaten the future sustainability of the department.

As the department's future was uncertain, urgent research was required in order to determine, firstly, the level of success achieved by the co-location restructure in bringing about an improvement in service delivery by the department and, secondly, the threat of a decline in staff motivation and performance levels, as a result of a restructure of this magnitude, consequently requiring a 'recipe' that would prevent a decline in motivation and a subsequent decline in performance that would lead to a reduction in the quality of service delivery outputs by the department.

In order to address the problem situation facing the scheduling department, a research question was posed, that if addressed through research and effectively answered, would satisfactorily address the original concern. In order to guide the research process in addressing the concern, the following research question was posed: *How can the service delivery of a department be improved, if at all, as a consequence of physically restructuring the department roles into co-located teams and team procedures while maintaining the department's staff motivation and performance levels, thereby ensuring department sustainability into the future?*

Before the researcher could begin to answer the research question, the scheduling department restructure had to be described in detail to place it in context as a research topic. The research process was then defined by the research hexagon comprising of a combination of the key action research steps. The SCQARE format provided formed a framework for research and the main stages of action research were applied in order to achieve the desired research outcome. The researcher defined the cone cycle of on-going learning in order to describe the various cycles of learning that took place through the duration of the research process.

In the section to follow, the researcher critically reflects on the effectiveness of the research process in answering the fundamental question posed.

9.2 Fundamental question addressed

The management team embarked on the co-location restructuring of the scheduling department in order to attempt to secure the department's future sustainability. However, it was not known at that stage whether the co-location changes made to the department at the time, would bring about the improvements in service delivery required to ensure that the department is not disbanded. Furthermore, it was identified that the motivation and performance levels of staff during a change process as extensive as the co-location restructure, may well decline and thus threaten the service delivery capabilities of the department. Therefore, the research outcomes needed to determine the level of success achieved through restructuring, as well as identify a 'recipe' for ensuring the maintaining of motivation and performance levels during and post restructuring. The concern over the future sustainability of the department has relevance to the situation, which is clearly the uncertainty over the success of the co-location restructure and the lack of knowledge of how to maintain staff motivation and performance. Furthermore, the situation adequately explains the concern because management needs to determine the level of success and the recipe for maintaining staff motivation and performance levels if they hope to succeed in ensuring the future sustainability of the department.

What must be determined is whether the concern has been adequately addressed through the research process. This will be determined through critical reflection of the research outcome in adequately answering the fundamental question posed. To recap, the fundamental question was:

Is it possible to improve the service delivery of a non-manufacturing or service department through the application the manufacturing cell concept to the restructure of a service department and how does one maintain staff motivation and performance through a change process of this nature and magnitude?

In order to answer the fundamental question the research process was required firstly to adequately explain how the manufacturing cell concept was applied to the restructure, in order to gain full understanding of its benefits as a model for restructure, and also to determine the level of success of the restructure that would, in turn, identify the effectiveness of the manufacturing cell concept as a model for restructure. Secondly, to define a model or blue print for re-structuring that will unlock the key to ensuring that staff motivation and performance are maintained throughout the restructuring process. If adequately answered, both restructure success through the application of the manufacturing cell concept and the key to maintaining motivation and performance levels will ensure the success of future restructures.

The researcher approached the research process by seeking to answer the research question posed by focusing the research approach in two areas. Firstly to determine how effectively the co-location restructure had brought about improvements in the service delivery of the department that would determine future sustainability. Secondly, he focussed on analysing the observations made during the restructure in order to develop a hypothesis that would ensure the maintaining of staff motivation and performance. In order to determine the level of restructure success, the researcher began the evaluation process by first deciding on the data gathering techniques that would best draw out the data required for analysis. Then the researcher identified service improvement indicators that define the target areas for research that would best determine the impact of the restructure on the service delivery by the department. After implementing the data gathering techniques and gathering sufficient data, the researcher critically evaluated the data gathered through argument building. By applying the theory of argument building, claims could then be made as to the effectiveness of the restructure in bringing about an improvement in service delivery against each indicator. From the results identified, it was determined that the restructure had been successful.

The application of co-located cluster teams and the physical floor plan changes that were implemented, along with the procedures and technological changes made, brought about various key improvements in the daily operation of the department. The interaction between schedulers and pre-planners improved and management was integrated into the team, as a result of the improvement in proximity between management and the roles. This resulted in an improvement in communication between management and the roles, making management more easily accessible to everyone. It was determined that the move to an open plan office, that ultimately supported the establishment of the cluster teams, resulted in improvements in openness and transparency between the roles. It also improved management interaction and involvement in the transport operations and daily operational issues that, ultimately, resulted in improvements in work quality and teamwork. The formation of co-located cluster teams resulted in improvements in problem resolution and staff expertise. Direct communication access to customers was implemented during the restructuring process in an attempt to improve the department's service delivery by offering a problem resolution access point for customers. Direct access by the customer resulted in the formulation of an environment for live resolution of a problem, whereby delivery related problems could be live resolved with the customer on the line.

With the advent of direct access it was necessary to standardise the problem solving process. As a result the problem solving decision tree was introduced to the department and this resulted in an improvement in the quality of problem resolution by the department. The decision tree introduced standardisation and structure to the problem solving process, and was designed to ensure cost effective solutions for the company and improve problem solving timing. Roles within the department were also improved and provided more clarity to staff regarding the quality assurance

measures and their accountability in terms of what is expected of them in their roles. Focus by the management team on empowerment, combined with a participative management approach, resulted in increases in the staff's sense of self-worth and greater accountability. By defining more clearly the processes and procedures in the department, staff were empowered to act within the clearly defined boundaries as opposed to being told what to do. With the introduction of quality assurance into the department, personal improvement and coaching of staff was introduced resulting in a management style change from an autocratic "I say, you do" approach to a coaching for performance approach. Similarly the introduction of the reward ceremony encouraged competitiveness, defined an environment for improvements in staff motivation through reward ceremony exposure and ensured one standard for all. The establishment of the reward ceremony resulted in increased self worth and a greater sense of belonging. Through improvements in reporting, plus a renewed focus on the transport contractor performance at depot level by the department, contractor awareness of performance was improved, thereby resulting in an improved team approach to customer service.

Based on this description of the evaluation phase of the research process, it is clearly evident that the research process has adequately addressed the fundamental question posed. The restructure of the department has been successful in improving service delivery to customers across most of the success indicators. It can, therefore, be stated with confidence that the application of the co-location restructuring of the scheduling department has brought about the required improvements in the department that have, ultimately, improved the quality of the department outputs, namely the quality of schedules and live resolution of delivery problems. Based upon these listed improvements, it can be stated with confidence that the co-location changes made to the scheduling department have brought about improved efficiency between the roles. Therefore, co-location changes could be applied to any department with groups of staff or individuals who have to interact daily in order to achieve a common outcome.

The research process concluded with the defining of the hypothesis of restructure and through this description, a recipe for ensuring the consistent motivation and performance levels through change, was put forward. The research outcome also clearly described the interaction between motivation and performance and defined the approach needed by managers in order to prevent a decline in motivation and, hence, prevent a decline in team performance. Central to the guide for managers arising from the hypothesis of restructure is the level of the maturity of the managers' approach to the change process. This approach involves the following: participative management style, trust, respect, one standard, constant communication, reinforcement of good performance, and application of wisdom and past learnings. The hypothesis proposed that the application of these important attributes, together with the manager's understanding of the fluctuations in team motivation and performance levels, would ensure the success of the change process. By being in tune with the fluctuations in team motivation and performance levels, a manager will be more

effective in counteracting any decline in team motivation. Therefore, awareness of the management motivation-performance cycle and the management engagement rules, defined by the hypothesis of restructure, will provide a manager with the tools to effectively implement a department restructure without negatively affecting staff motivation and performance levels and, thereby, realise ultimate success, and, as in the case of the scheduling department restructure, realise a sustainable future for the department. The defining of the hypothesis of restructure hence incorporated the engagement guidelines for managers and the motivation-performance cycle. The research process has adequately addressed the original concern regarding the future sustainability of the department by comprehensively answering the research question posed at the beginning of the research process.

The research undertaken by the researcher was not without its limitations. The limitations experienced by the researcher were predominantly in the application of structured interviews and the ordinal survey and the subsequent analysis of the data gathered during the research process. The structured interviews conducted with the staff of the department, while effective in providing a rich source of data for analysis, certain questions if phrased differently would have possibly resulted in answers that were more aligned to the improvement indicators. This was only realised by the researcher after the interview transcripts had been completed. In terms of the ordinal survey, only fifty percent of the sales reps targeted with the survey responded, limiting the richness of the data derived from the survey. The researcher attempted to resend the survey but was unsuccessful in receiving further responses.

A further limitation to the research undertaken was the amount of data gathered. The researcher focussed on obtaining as much data as possible and this resulted in a large data analysis effort that was both time consuming and difficult to assimilate. Furthermore, the data comparison between the scheduling department and that of the UK scheduling department was largely ineffective in contributing to the research outcome.

In conclusion, the research process undertaken has identified the next cycle of research. With reference to the cone cycle of on-going research and learning (depicted in Figure 2.2), the research process has defined the next cycle cone of research that will build on the learnings defined in this cycle. The outcome of the research process defined the level of success and, in so doing, also identified the gaps that management will need to focus on in the future. The gaps identified, in turn, form the basis for future research. In order to ensure the department's future sustainability, management may need to focus on communication between delivery controllers and the other roles, the negative impact of noise as a result of the open plan environment, the poor inbound telephone service levels, the cost implications of customers' manipulation of the problem solving tree and contractor non-conformance.

These 'gaps' identified through the research process, propose future action to be taken that will define the problem situation and the next cycle of research to be conducted in future.

9.3 Personal reflection

The journey undertaken by the researcher from his appointment as scheduling manager, and the subsequent department restructuring process, to the point of realising restructure success, has been both incredibly exciting and challenging. After taking over a department with no management experience behind him, and then having to restructure the department in order to realise service delivery improvements and secure the department's future, compelled the researcher to draw on his personal strength, as well as his management learnings gained through his university studies.

The researcher focused on three key learnings in order to realise success as a manager. Firstly, his focus on people management was key to ensuring a high level of respect for staff and their needs by constantly marrying staff self-worth with the requirements of the business, so as to achieve harmony between the two. Secondly, he applied his energy to practicing a participative management style at all times thus ensuring that staff were first introduced to an idea or change requirement and then given time to reflect and respond to it. Staff were also allowed to contribute to the design and implementation of the change. Thirdly, he focussed on good performance by routinely rewarding top performers and emphasising good performance over bad. He knew instinctively that a 'people' approach to management was a key ingredient if he wanted to achieve success as a manager.

The level of creative freedom that the scheduling manager was awarded by senior management in terms of the scheduling department restructure was unparalleled. Senior management left the scheduling manager to design and implement the changes as he saw fit, giving him carte blanche to disband old and establish new positions, design the floor layout of the department and re-define jobs, processes and procedures. This level of freedom is seldom realised in a corporate environment and was essential for realising success as he could effectively apply his university learnings to the change process.

The researcher was first introduced to the manufacturing cell concept early on in his studies. The concept was incredibly interesting at the time and he consigned it to memory. This interest eventually culminated in a desire to research the merits of the manufacturing proximity model when a suitable opportunity arose, namely through this research process and the physical application of the restructure in the workplace. With the knowledge of the manufacturing cell concept and the newfound knowledge acquired through his existing studies, the researcher defined the project plan Gantt chart for the restructure of the scheduling department. Due to his lack of experience in management, the researcher had to be mentored by a member of the Human Resources Department. He frequently called upon that person to advise him on how to phrase change communications to his staff, on what could and should not be said to the staff when engaging them

on sensitive issues during the restructuring process and how to hone his communication skills in terms of respecting and listening to staff needs during the change process. His relationship with his mentor, therefore, increased his level of learning and he quickly gained confidence, allowing his participative management approach to develop, a process that has culminated in success.

Through the research process, the implementation of the various data gathering techniques and subsequent evaluation of the data resulted in significant personal learning and gratification. The research process that the researcher embarked on through his studies contributed significantly to the success of the restructure and subsequent analysis of successes achieved. The researcher's research studies provided the vital direction needed to realise success in terms of the scheduling department's future sustainability. The personal learning gained through this research journey has developed the researcher on a personal level and, as a result, he will be able to move to greater life challenges and set higher goals for himself into the future.

In conclusion, the researcher wishes to state that he will always be indebted to his senior management team who allowed him to realise personal goals through their unwavering support and the freedom of expression that he was afforded during the implementation of the restructuring process and the management of the scheduling department. The experience was both unique and humbling. Furthermore, he was afforded the rare life opportunity of studying and at the same time being appointed to the position of scheduling manager in charge of the scheduling department, an opportunity that is not given to many people. As a result of this, the researcher was able to harness both his studies and his career opportunities which contributed to significant personal learnings, resulting in an increase in personal wisdom and experience.

PART IX

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APPENDICES

APPENDIX A – DEPARTMENT RE-STRUCTURE

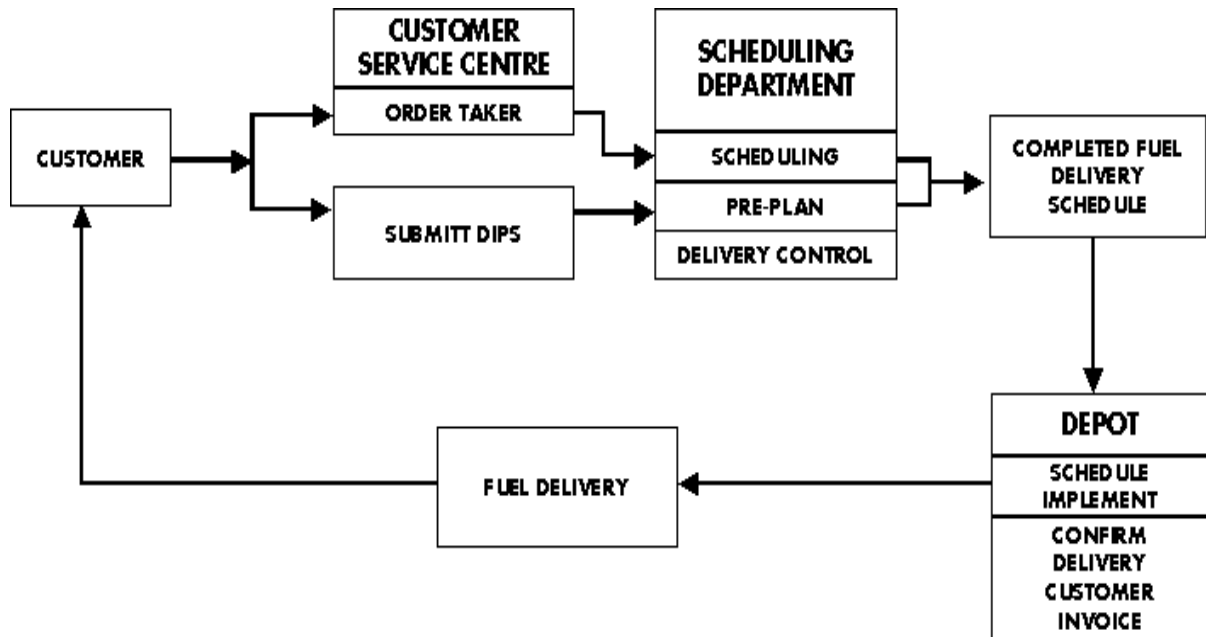


Figure A.1 Order fulfilment process

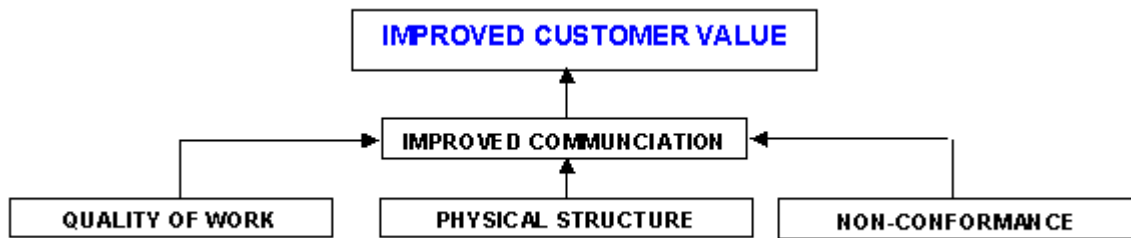


Figure A.2 Scheduling department strategy matrix

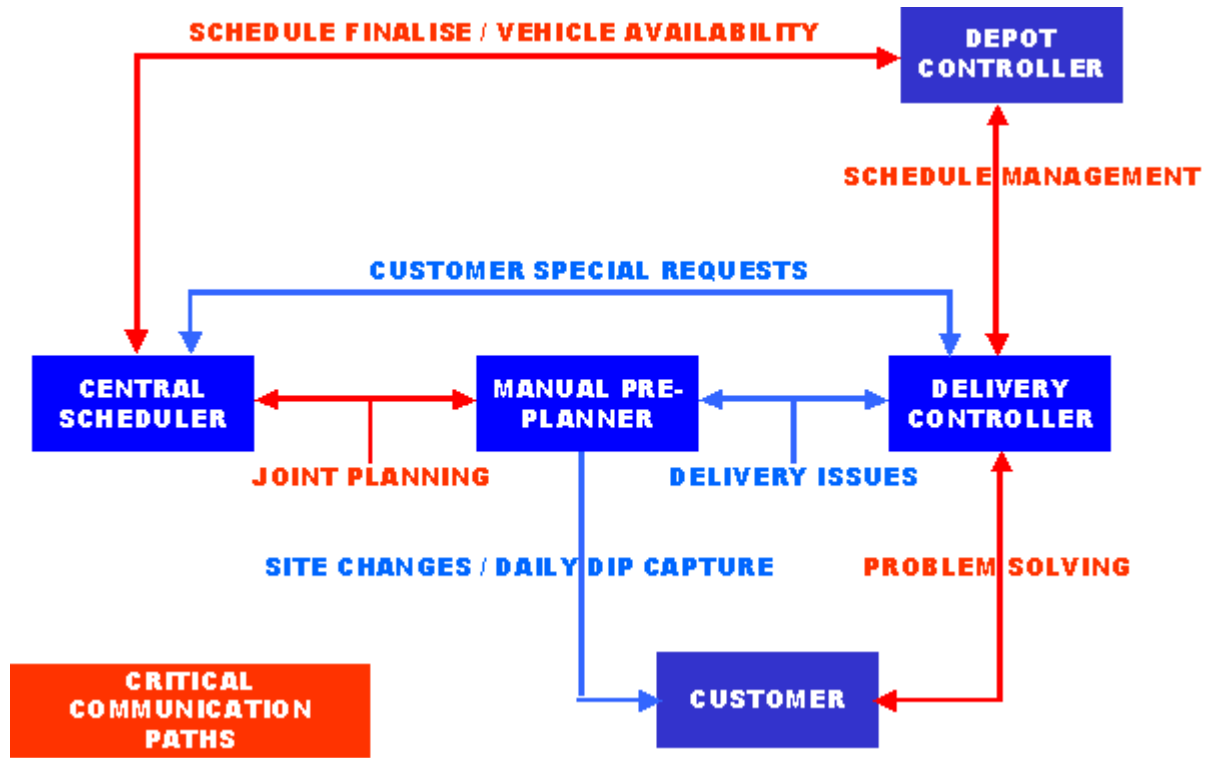


Figure A.3 Inter-role communication channels

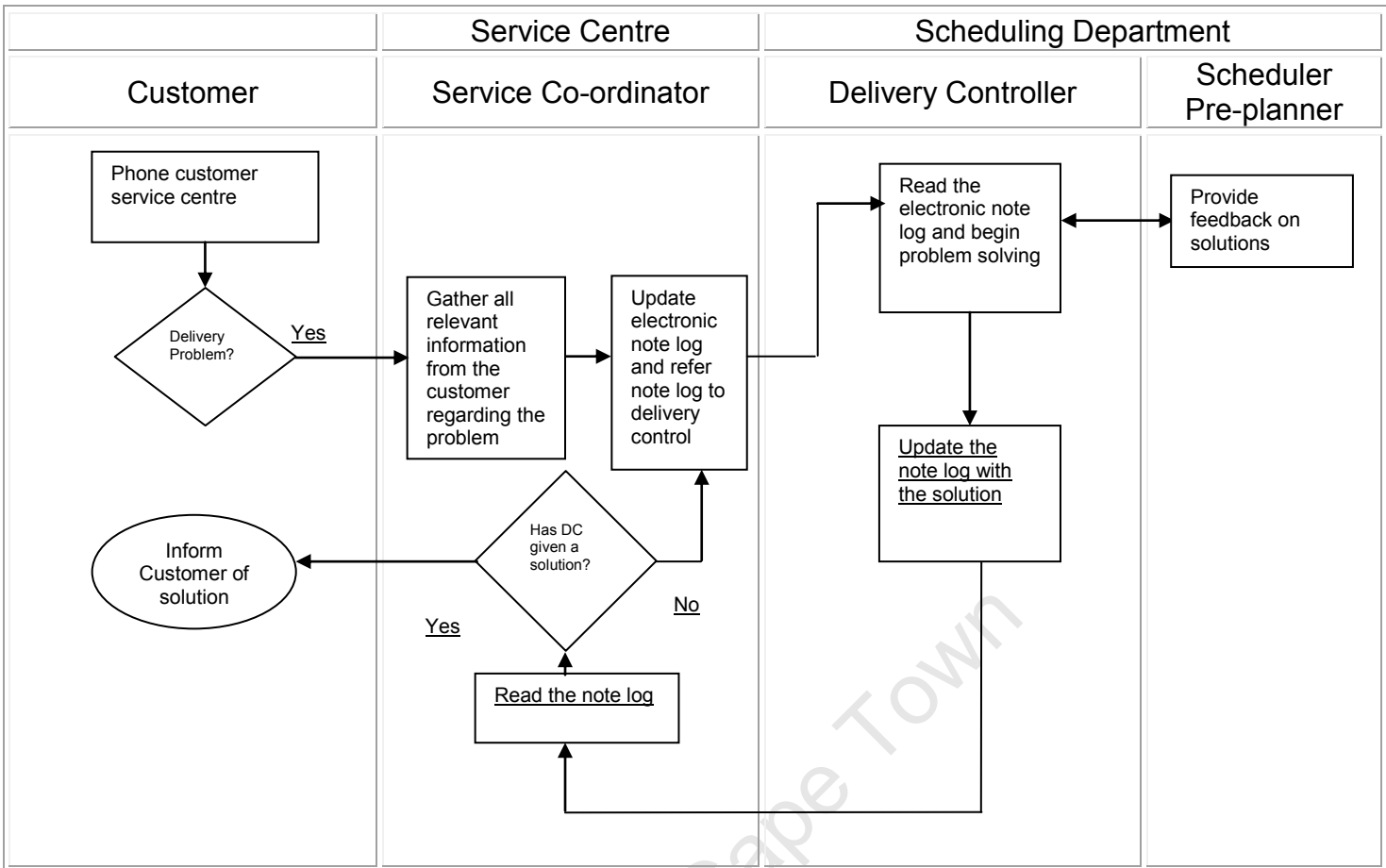


Figure A.4 Communication channel with customers prior to restructure

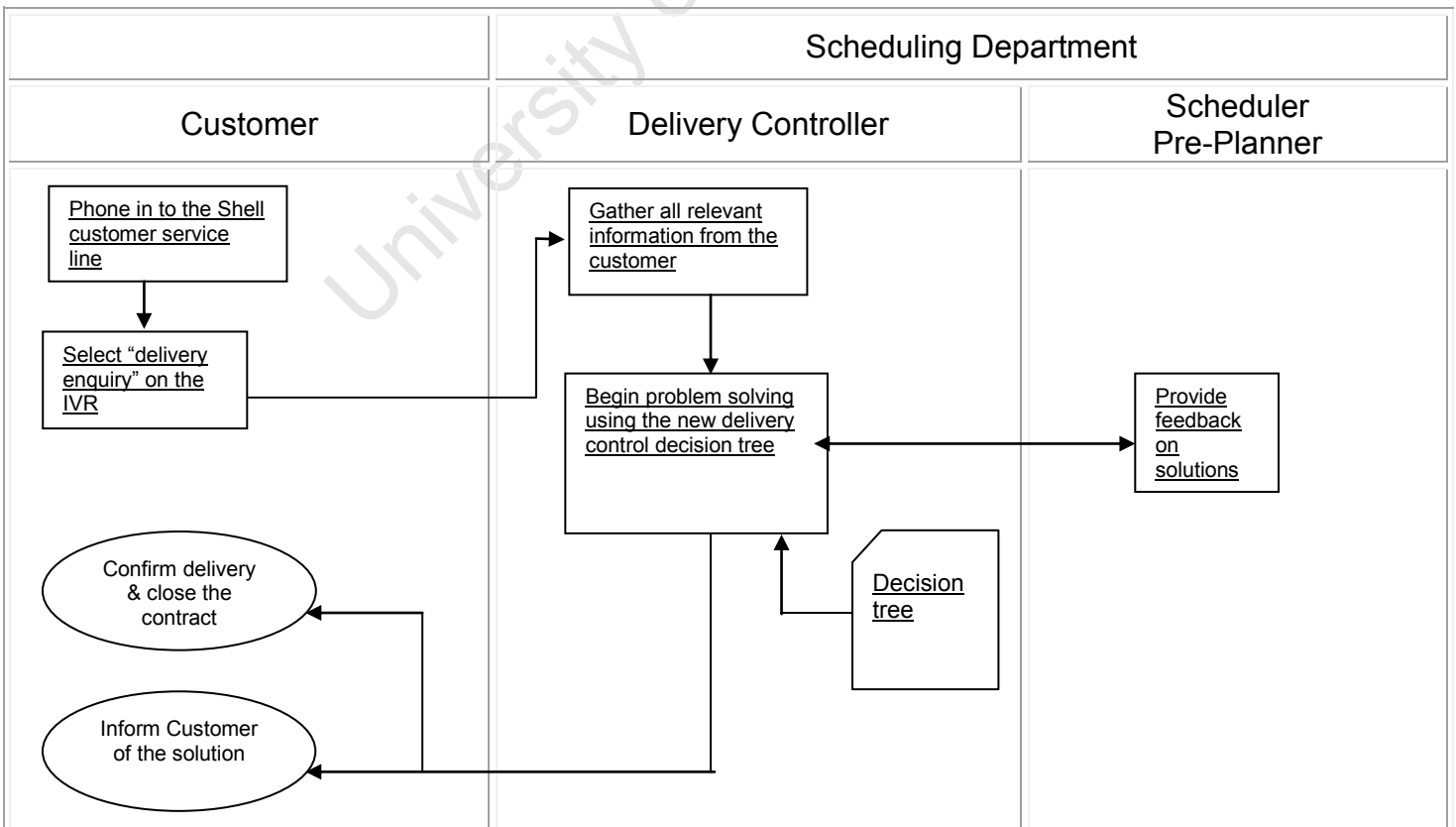


Figure A.5 Communication channel with customers after restructure

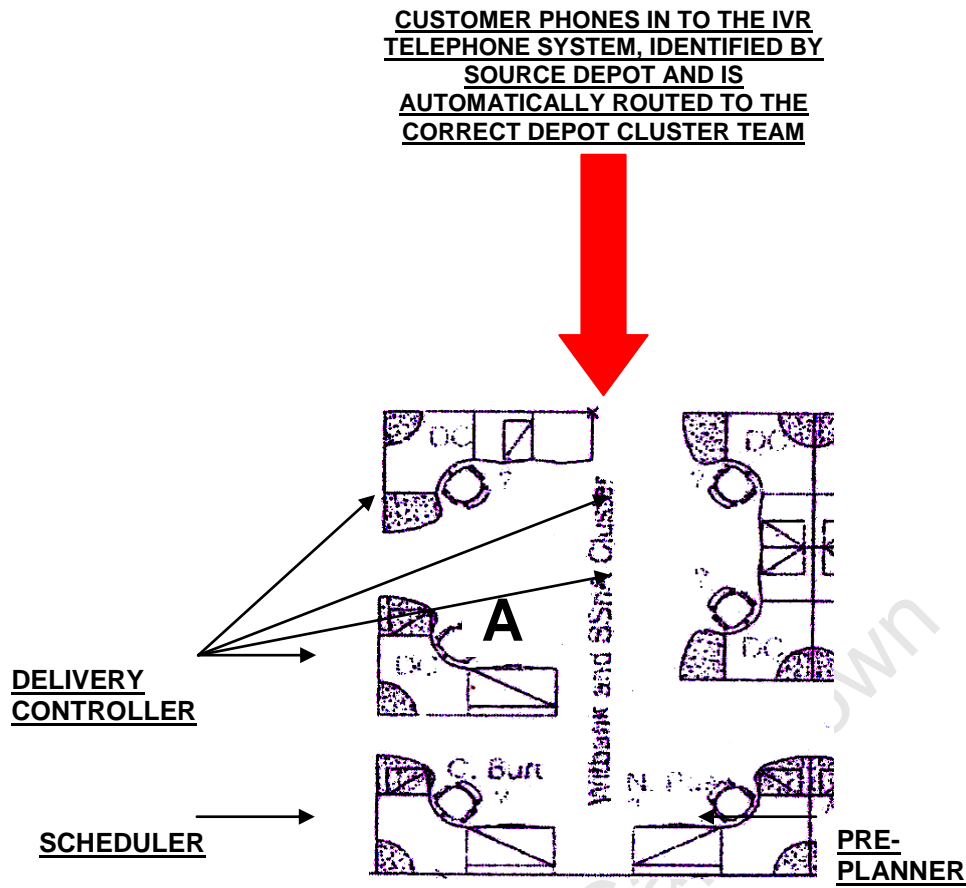


Figure A.6 Customer direct access to cluster teams

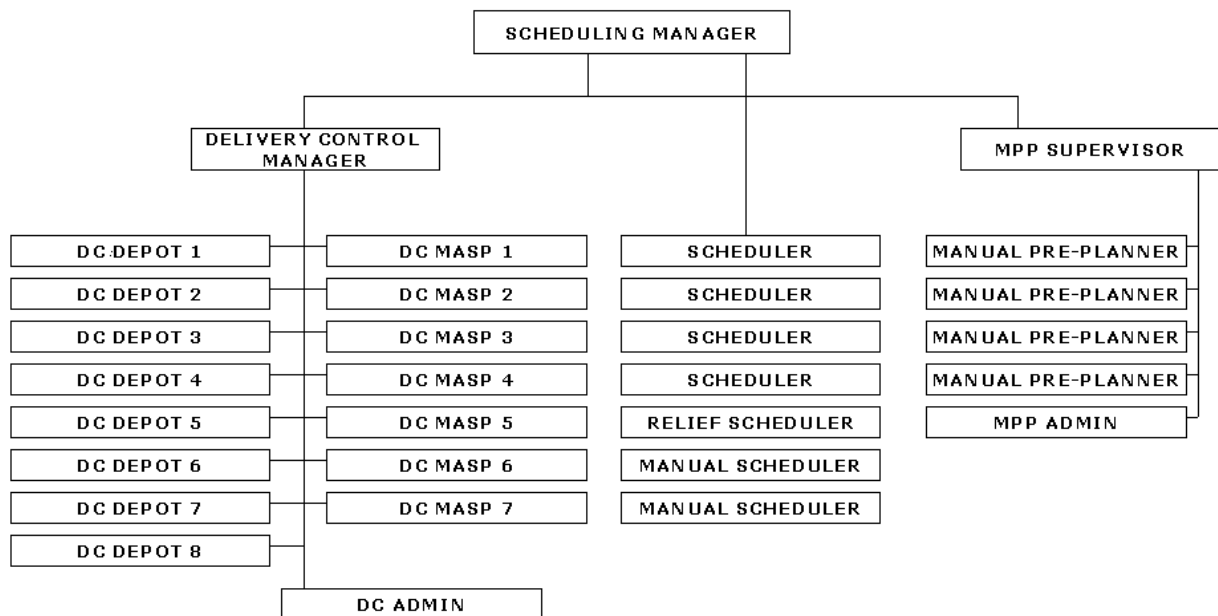


Figure A.7 Scheduling department organogram prior to the restructure

| SCHEDULER - INDIVIDUAL KPI RESULTS | | | | | |
|------------------------------------|-------------------------------------|----------|----------|-----------|----------------|
| Staff Name | | Allister | | CLOSE | |
| KPI | MEASURE | ACHIEVED | TARGET | WEIGHTING | SCORE ACHIEVED |
| CAPACITY UTILISATION | % Schedule Utilisation | 79.00 | 92% | 5 | 3.95 |
| TIME UTILISATION | % Planboard Usage | 72.00 | 75% | 5 | 3.60 |
| DAILY ORDER STATUS | <= 2 Days Average | 2.00 | <=2 Days | 5 | 5.00 |
| QUALITY ASSURANCE | NUMBER OF ASSESSMENTS COMPLETED: 37 | | | | |
| HSSE | IP Check_Previous Trip | 105.00 | 100% | 10 | 10.00 |
| SCHEDULE AGREE | % Agreed | 100.00 | 100% | 5 | 5.00 |
| STATS ACCURACY | % Achieved | 75.00 | 100% | 10 | 8.00 |
| PRIORITISATION | % Prioritisation Accuracy | 101.00 | 100% | 20 | 20.00 |
| PHYSICAL SCHEDULE | % Complete | 75.00 | 100% | 15 | 11.00 |
| CUTS ANALYSIS | % Cuts Accuracy_Phoned | 76.00 | 100% | 15 | 11.00 |
| PERFORMANCE TRACKER | Number of Green Cards | 0.00 | 10 | | |
| | Number of Yellow Cards | 0.00 | 0 | | |
| | Number of Red Cards | 0.00 | 0 | 10 | 10.00 |
| Final SCHEDULER Score | | | | | 88.55 |
| Supervisor Comments Q1/Q2 | | | | | |
| Supervisor Comments Q3/Q4 | | | | | |

Figure A.8 Scheduler key performance indicators

| SCHEDULER QUALITY ASSURANCE ASSESSMENT SHEET | | | | DONE |
|--|------------------------------|---------------------------------------|-------------------------------------|-----------------------------|
| ASSESSMENT DETAIL | | | | |
| Schedule Date | Assessor | Comments | | |
| 02/02/2007 | | | | |
| Staff Name | Position | | | |
| Allister | Scheduler | | | |
| Cluster Team | Supervisor | | | |
| Alberton | Wayne | | | |
| SCHEDULE AGREEMENT | | PHYSICAL SCHEDULE | | |
| Schedule discussed and agreed? (2) | Comments Field Updated (1) | Pre-shift Data Sheet Attached (2) | Planboard (2) | PFS (2) |
| 0 | 0 | 0 | 0 | 0 |
| STATS ACCURACY | | Unscheduled and cuts (4) | Schedule + long distance report (2) | Order Extraction list (2) |
| No of orders extracted (2) | No of Mustgos extracted (2) | 0 | 0 | 0 |
| No of orders scheduled (2) | No of duplicate extracts (2) | Frd orders repeat return calls (2) | PPF Summary Sheet (4) | Rqsts Template attached (2) |
| 0 | 0 | 0 | 0 | 0 |
| Total UMG's (5) | VA vs VA correspondence (5) | Standardised Vehicle availability (2) | Stapled correctly (2) | |
| 0 | 0 | 0 | 0 | |
| Reason unscheduled, must go, additional comments (2) | | PRIORITISATION | | |
| 0 | | All PPF_CPP orders (10) | UMGs prev shift (10) | Babysitting (10) |
| | | 0 | 0 | 0 |
| | | Old Orders accom (5) | Requests extracted_acc (5) | Scheduled per Banding (5) |
| | | 0 | 0 | 0 |
| ERROR REPORT MAINTENANCE | | Priority Urgent Stamped (5) | Priority PPF and CPP Stamped (5) | |
| Errors clear 2 shifts (1) | IP Stamp_Sign (2) | 0 | 0 | |
| Previous trip checked (1) | 0 | | | |

Figure A.9 Scheduler quality assurance assessment sheet

| DELIVERY CONTROLLER - INDIVIDUAL KPI RESULTS | | | | | |
|--|-----------------------------|---------------------|--------|-----------|----------------|
| Name: | | Bennie | | Close | |
| Position: | | Delivery Controller | | | |
| KPI | MEASURE | ACHIEVED | TARGET | WEIGHTING | SCORE ACHIEVED |
| CALL RATE | Average Call Rate per Hour | 4 | 5.7 | | |
| | Average Call Rate per Shift | 24 | 40 | 35 | 22 |
| TEAM INBOUND | Team SL % Achieved | 76 | 80 | 5 | 4 |
| QUALITY ASSURANCE | QA % Achieved | 56 | 80 | 30 | 17 |
| ADHERENCE TO SCHEDULE | Number Of Late Coming | 0 | 0 | 5 | |
| | Total late Time | 0 | 0 | 5 | |
| | Logged on Hours Per Day | 7 | 6.8 | 10 | 20 |
| PERFORMANCE TRACKER | Number Of Green Cards | 0 | 10 | | |
| | Number of Yellow Cards | 0 | 0 | | |
| | Number of Red Cards | 0 | 0 | 10 | 10 |
| Final DC Score | | | | | 72 % |
| Supervisor Comments | | | | | |

Figure A.10 Delivery controller key performance indicators

| DELIVERY CONTROLLER QUALITY ASSURANCE ASSESSMENT SHEET | | | |
|--|------------|---------------------------------------|---------------------|
| <input type="button" value="DONE"/> | | | |
| ASSESSMENT DETAIL | | | |
| Contact Log D: | 02/02/2007 | Assessor | |
| Staff Name | Pieter | Position | Delivery Controller |
| Cluster Team | Alberton | Comments | |
| Supervisor | Wayne | | |
| LOGGING ACCURACY | | GENERAL INFORMATION | |
| Correct Process Logged | 0 | Product Affected | 0 |
| Linked To Correct Order | 0 | JDE Number | 0 |
| | | Tankage | 0 |
| | | Dips | 0 |
| | | Daily Offtake | 0 |
| | | Urgency | 0 |
| | | Order Due? | 0 |
| PROBLEM SOLVING INFORMATION | | | |
| | | Distance from Depot | 0 |
| | | Vehicle Access | 0 |
| | | Open Times | 0 |
| | | SPD Compatible? | 0 |
| | | Banding/Priority | 0 |
| | | Trip Detail Reflected | 0 |
| PROBLEM SOLVING | | FOLLOW-UP AND FEEDBACK | |
| Spare Capacity? | 0 | Time Commitment | 0 |
| Additional Vehicle? | 0 | Feedback to Customer | 0 |
| Customer Bump? | 0 | Retail in SLA - FSF Informed? | 0 |
| Checked for LOB | 0 | Handover Procedure Followed? | 0 |
| Alternate Depot? | 0 | Follow-up Consistant? | 0 |
| Spot hire? | 0 | Delivery Confirmation? | 0 |
| Assisted next PM following AM? | 0 | | |
| CONTACT LOG MANAGEMENT | | | |
| | | Contact did not go Red? | 0 |
| | | Agreed end-date extended as required? | 0 |

Figure A.11 Delivery controller quality assurance assessment sheet

| PRE-PLANNER - INDIVIDUAL KPI RESULTS | | | | | |
|--------------------------------------|----------------------------|------------|--------|-----------|----------------|
| Name | | Marshalene | | CLOSE | |
| Cluster | | Killarney | | | |
| KPI | MEASURE | ACHIEVED | TARGET | WEIGHTING | SCORE ACHIEVED |
| ORDER VS ULAGE | % Order to Ulage Variance | 88.00 | 100% | 15 | 13.00 |
| DEMAND SMOOTHING | % Week Vol to Weekend | 84.00 | 100% | 5 | 4.00 |
| DIP CROSS CHECK | % Dip Validation Accuracy | 100.00 | 100% | 5 | 5.00 |
| RUN DRY | % Run Drys - Un-Pump Level | | 0.05% | 35 | |
| | | | | | |
| | | 3.00 | | | 25.00 |
| RETURN | % Returns | | 0 | 30 | |
| | | | | | |
| | | 9.00 | | | 3.00 |
| PERFORMANCE TRACKER | Number of Green Cards | 0 | 10 | | |
| | Number of Yellow Cards | 0 | 0 | | |
| | Number of Red Cards | 0 | 0 | 10 | 10.00 |
| Final PRE-PLAN Score | | | | | |
| | | | | | |
| | | | | | 61.00 |

Figure A.12 Pre-planner key performance indicators

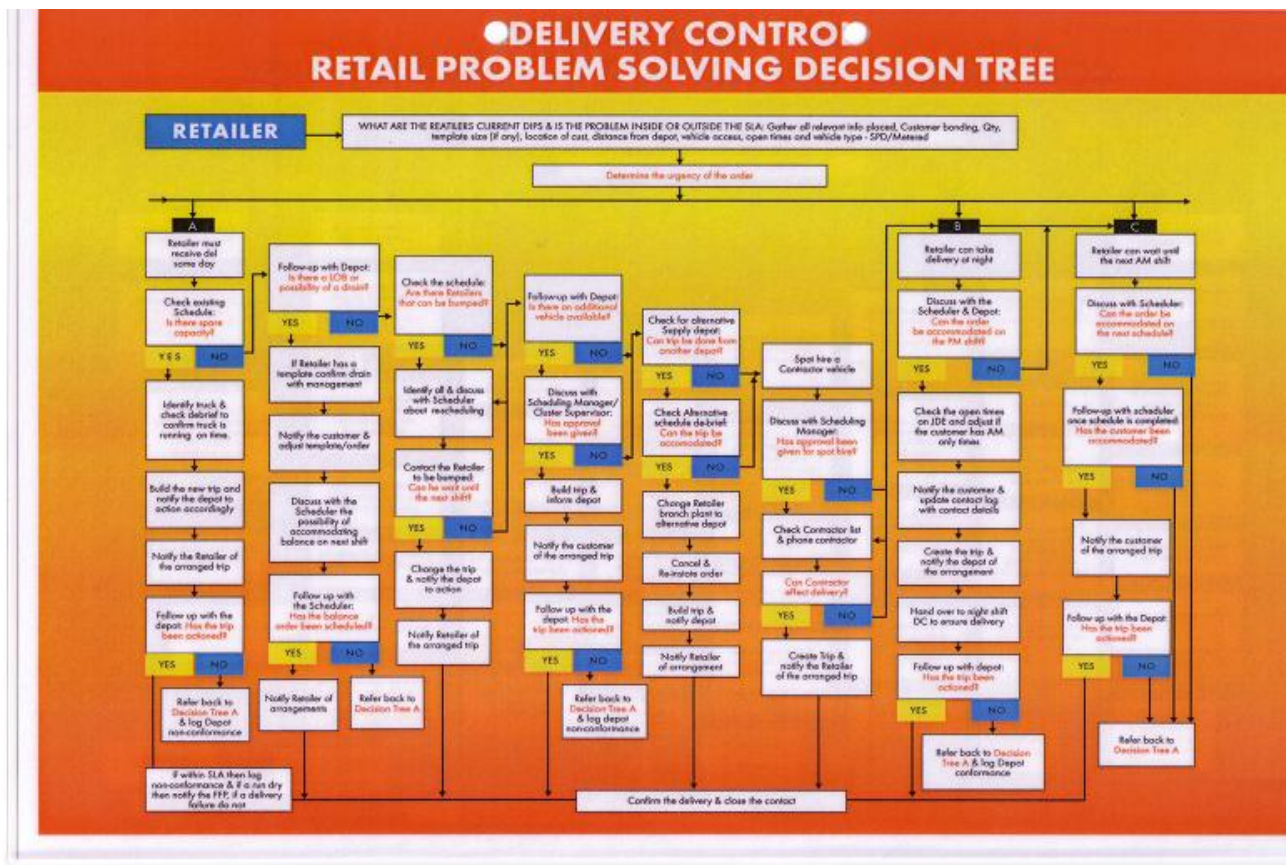


Figure A.13 Delivery controller problem solving decision tree

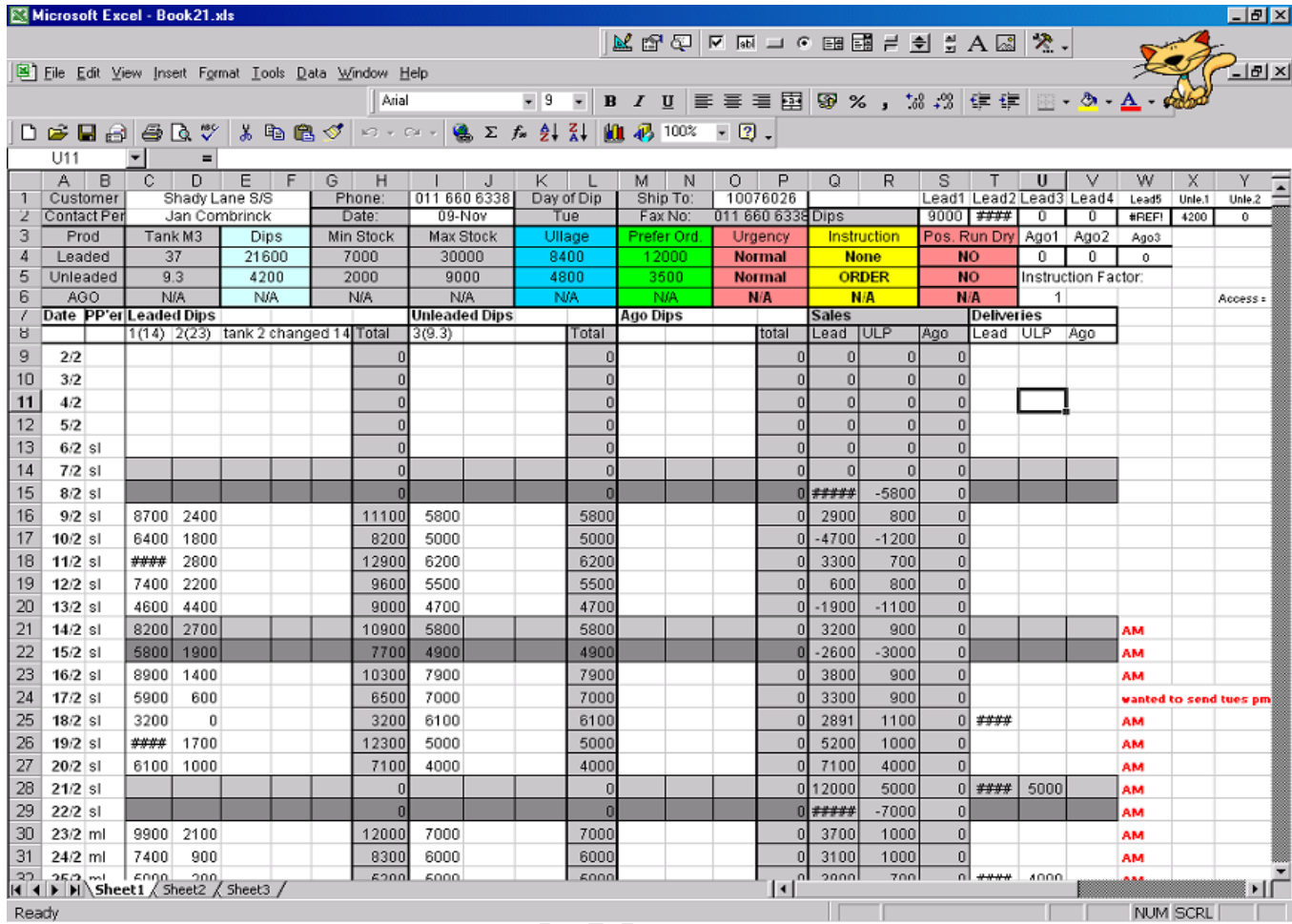


Figure A.14 Pre-planner spreadsheet prior to re-structure

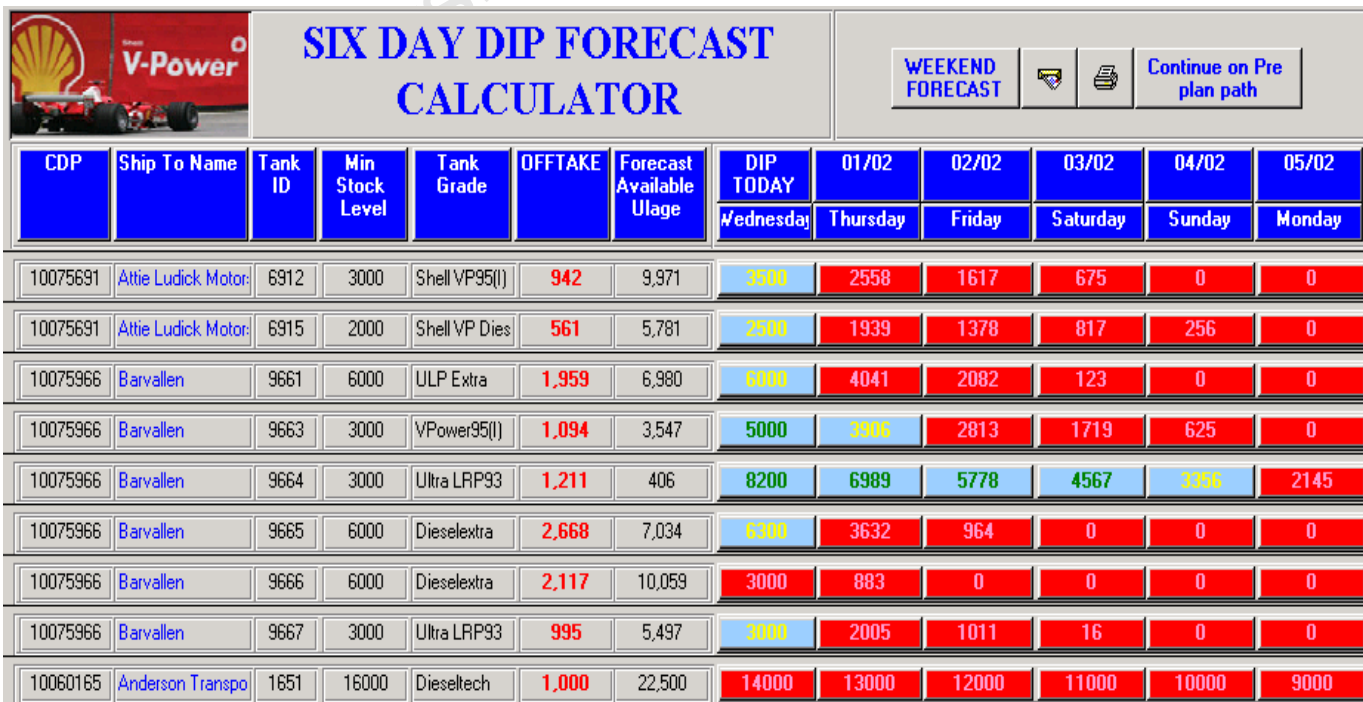


Figure A.15 New Pre-planner stock management tool – six day forecaster

THE FOLLOWING CUSTOMERS MUST RECEIVE DELIVERY ON THE NEXT SHIFT:


[Continue on Pre Plan Path](#)

| Cluster Code | CDP | Ship To Name | Tank ID | Tank Grade | Min Stock Level | Max Stock level | Dip Capture | Available Ulage |
|--------------|----------|-----------------------|---------|------------|-----------------|-----------------|-------------|-----------------|
| EL001 | 10075452 | Central Motors | 4524 | AGO | 2,000 | 4,000 | 0 | 4,000 |
| EL001 | 15715467 | OVK Petrusville | 4671 | AGO | 6,000 | 22,000 | 0 | 22,000 |
| EL001 | 15715467 | OVK Petrusville | 4673 | Mogas | 2,000 | 8,000 | 0 | 8,000 |
| EL001 | 10075474 | Mirage Motors | 4741 | V-Power | 4,000 | 13,500 | 0 | 13,500 |
| EL001 | 10075474 | Mirage Motors | 4742 | V-Power | 2,000 | 8,500 | 0 | 8,500 |
| EL001 | 10075474 | Mirage Motors | 4743 | Mogas | 6,000 | 22,000 | 0 | 22,000 |
| EL001 | 10075474 | Mirage Motors | 4744 | AGO | 7,000 | 22,000 | 0 | 22,000 |
| EL001 | 10075484 | Klein Spitzkop | 4841 | Mogas | 4,000 | 13,500 | 0 | 13,500 |
| EL001 | 10075484 | Klein Spitzkop | 4842 | V-Power | 2,500 | 7,000 | 0 | 7,000 |
| EL001 | 15720490 | OVK Britztown | 4902 | AGO | 6,000 | 13,000 | 0 | 7,430 |
| EL001 | 10075753 | Petrusville Vulstasie | 7531 | V-Power | 2,000 | 7,000 | 0 | 7,000 |
| EL001 | 10075753 | Petrusville Vulstasie | 7532 | Mogas | 2,000 | 9,500 | 0 | 9,500 |

Figure A.16 New Pre-planner stock management tool – Tank trigger screen



The screenshot displays a software interface for trip management. At the top, it shows the date and location: "Tuesday, November 01, 2005 - Alberton - Trip 286149". Below this is a "Plan Board" with a grid of time slots (from 23:00 to 06:00) and truck icons representing scheduled trips. A "Zoom View" map shows the location of the trip. The main part of the screen is an "Event Description" table for trip 286149.

| Log | Time | Trip | Event Description |
|-------------------------------------|-----------|--------|--|
| <input type="checkbox"/> | Tue 06:05 | GPS | Type: Accident; Other motorist |
| <input checked="" type="checkbox"/> | Tue 07:26 | 286149 | Accident |
| <input type="checkbox"/> | Tue 10:09 | GPS | Comment: Breakdown; Contamination; Delay; Delivery Failure; Disciplinary; Fire |
| <input checked="" type="checkbox"/> | Tue 10:39 | 286149 | Hijacking |
| <input checked="" type="checkbox"/> | Tue 12:36 | 286149 | GPS Log: Exit PHC; Injury on duty |
| <input checked="" type="checkbox"/> | Tue 15:07 | 286149 | GPS Log: Enter Al; Near miss |
| <input type="checkbox"/> | Tue 19:00 | 286171 | GPS Log: Exit Alberton (ALB) |

Figure A.17 New electronic schedule – Trip information screen

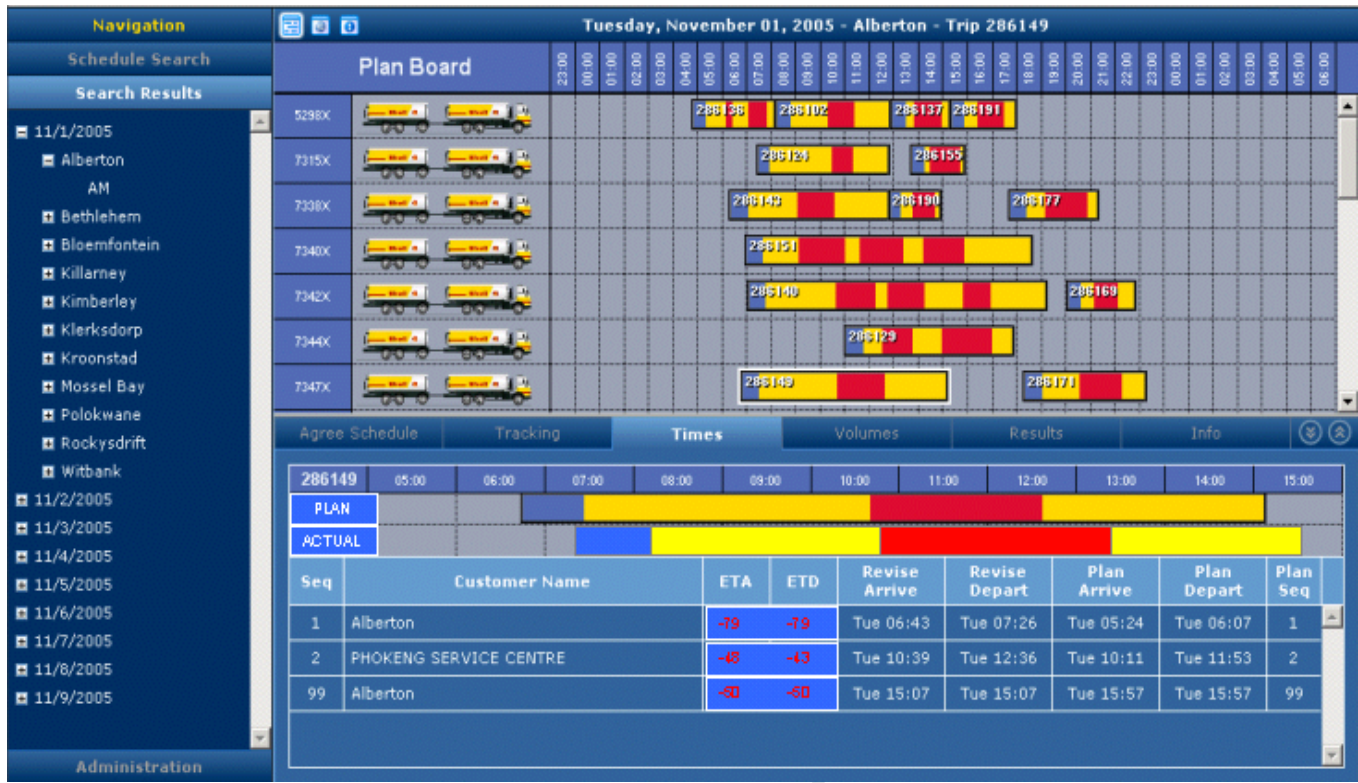


Figure A.18 New electronic schedule – Planned versus actual

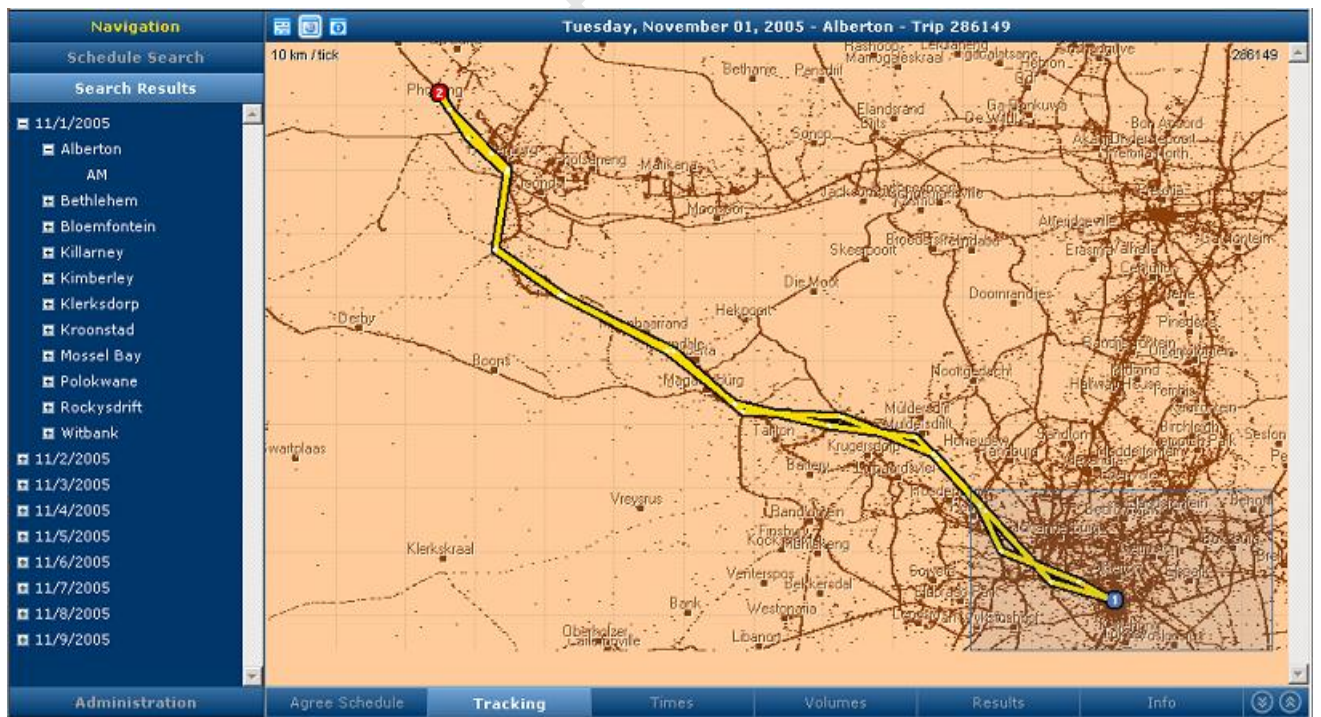


Figure A.19 New electronic schedule – satellite tracking map

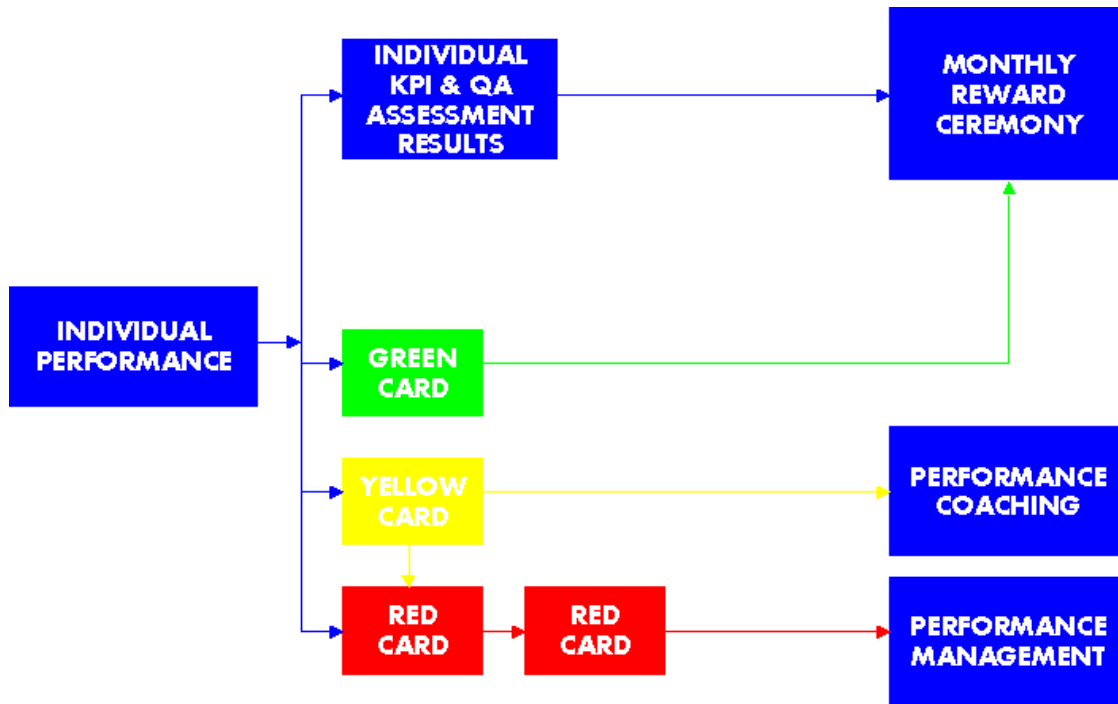


Figure A.20 Scheduling department performance management system

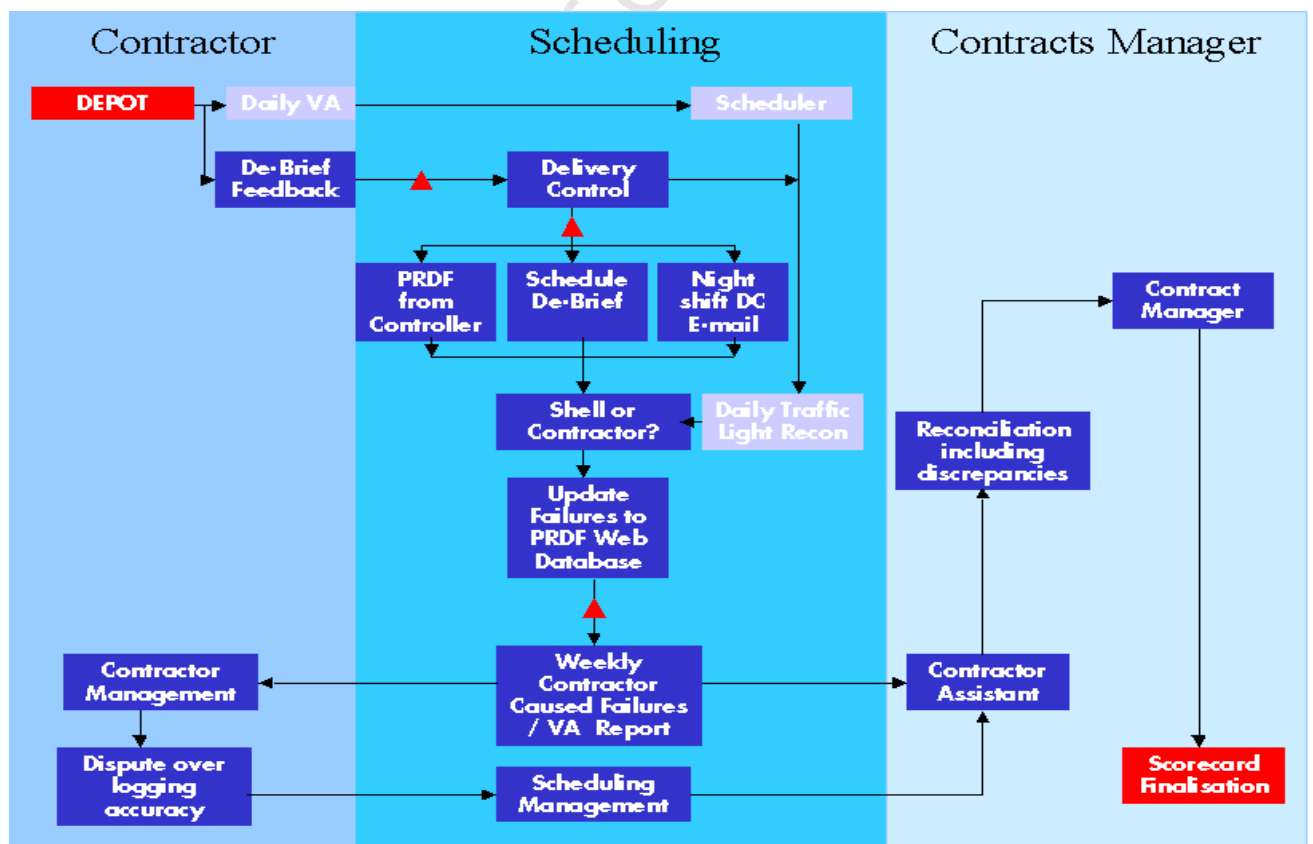


Figure A.21 Transport contractor non-conformance flow chart

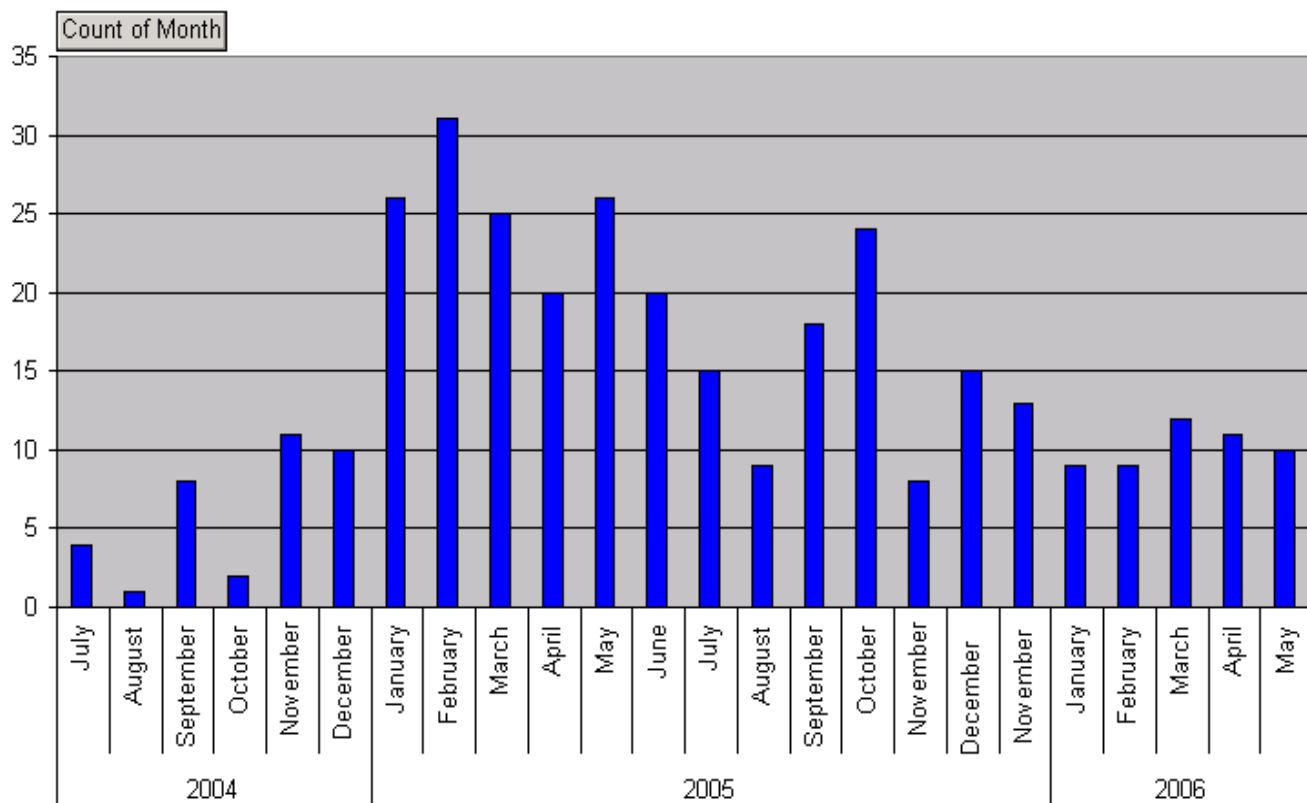


Figure A.22 Scheduling department frequency of accolades

APPENDIX B – PRODUCTION CELLS

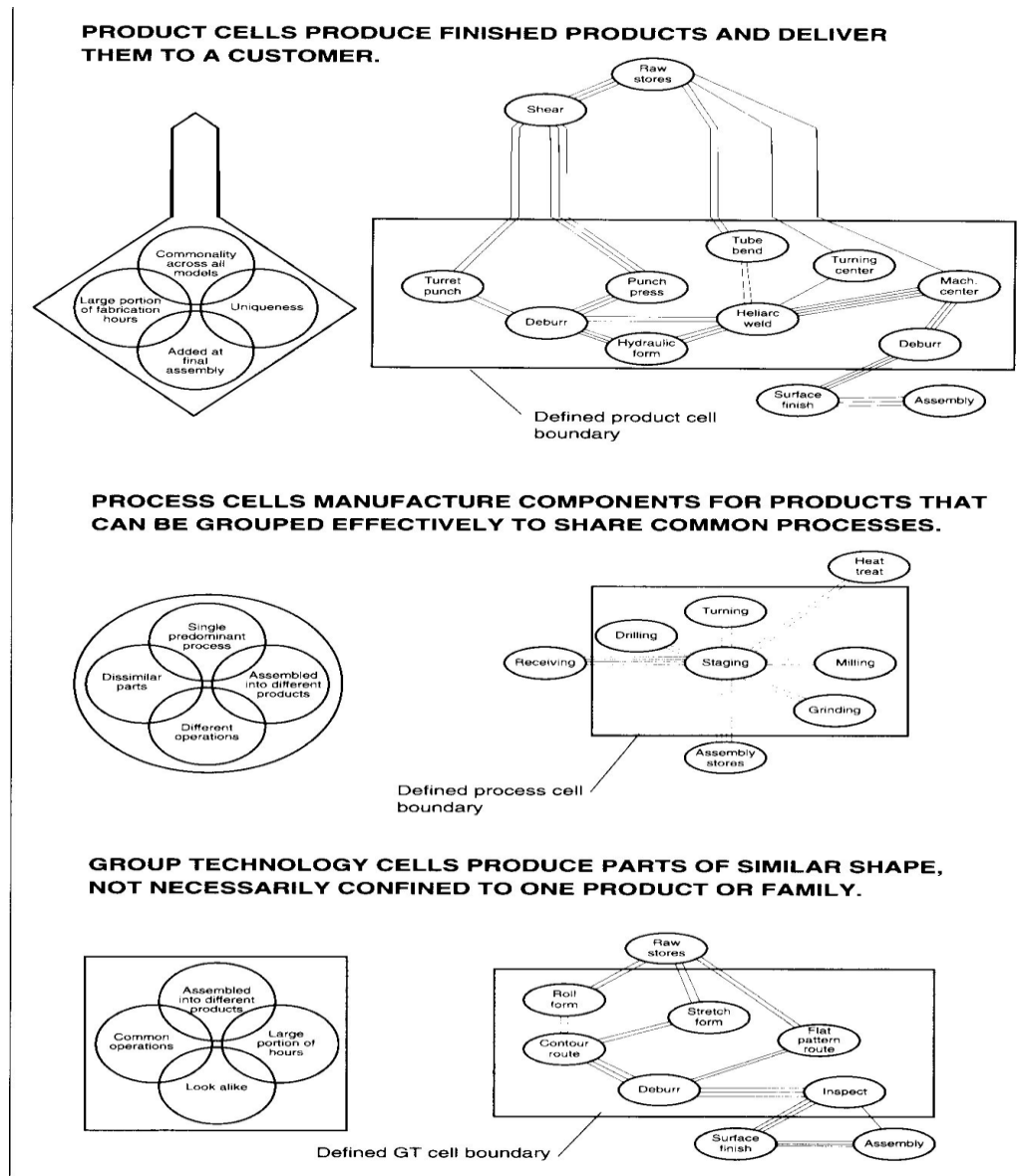


Figure 5-3. Most cells are grouped by product, process or group technology.

75

Figure B.1 Production cell types: Product, process and group technology cells. Nyman (1992)

Proximity diagram

Use for:

- Complex flow patterns (seek to minimize)
- Macro facility total

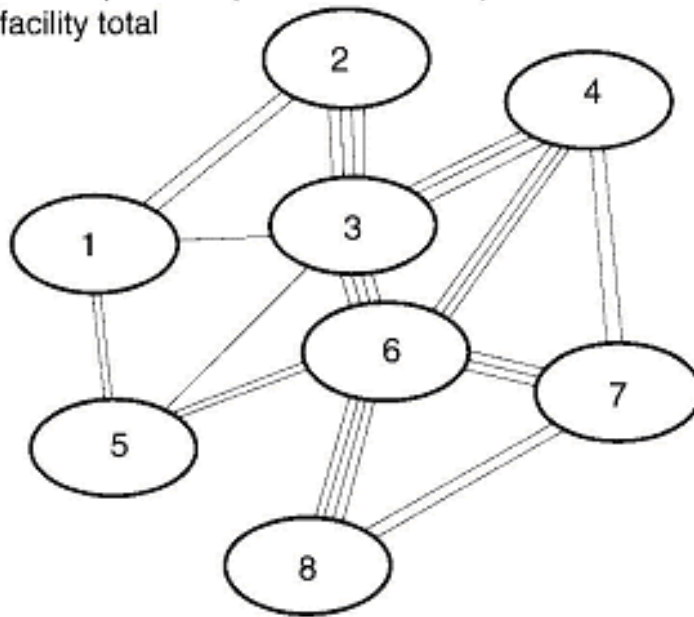
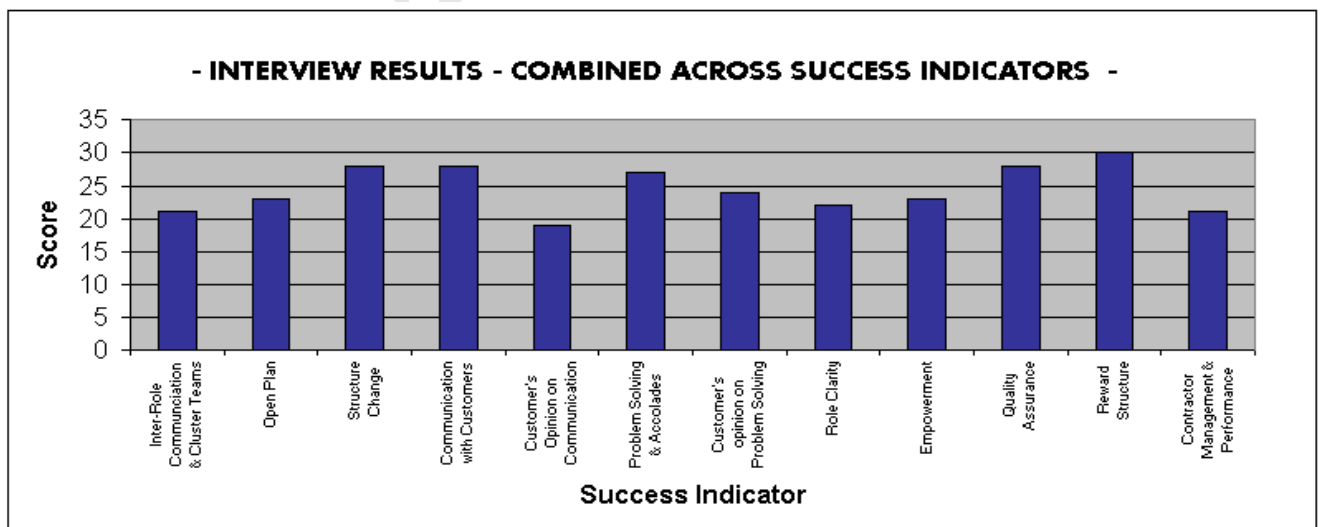


Figure B.2 Production cell proximity diagram. Nyman (1992)

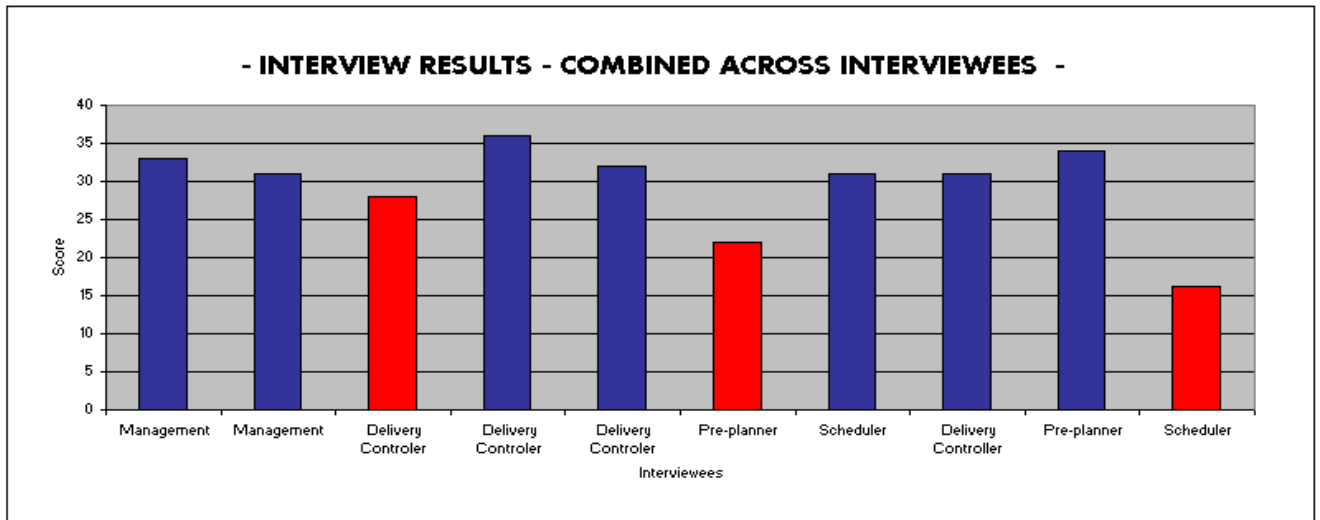
APPENDIX C – STRUCTURED INTERVIEWS

| SUCCESS INDICATOR | INTERVIEW QUESTION |
|---------------------------------------|---|
| Inter-Role Communication | Describe the communication between DC's, Schedulers and pre-planners? Have things changed since the re-structure? |
| Open Plan | What are your thoughts on open plan offices? How does the current open plan compare prior to re-structure? |
| Structure Change & Cluster Team | What are your thoughts regarding the current floor layout? How does this compare with how it used to be? |
| Communication with Customers | Describe your current channel of communication with customers. How does this compare to communication before the re-structure? |
| | How do customer's feel about the current communication channel? How does this compare with their feelings before the re-structure? |
| Problem Solving & Accolades | Describe how you problem solve? How does this compare with how you used to before the re-structure? |
| | How does the customer perceive the quality of problem resolution? How does this compare to the customer's perception prior to the re-structure? |
| Role Clarity | Describe your current roles and responsibilities? How does the clarity of your roles compare prior to the re-structure? |
| Empowerment | Are you empowered to make decisions? How does this compare prior to the re-structure? |
| Quality Assurance | What are your thoughts regarding the QA cycle? Compare this to previous QA systems prior to re-structure? |
| Reward Structure | Describe how the reward structure affects you? How does it compare to reward structures prior to re-structure? |
| Contractor Management and Performance | Describe current contractor performance? How does this compare with performance prior to the re-structure? |

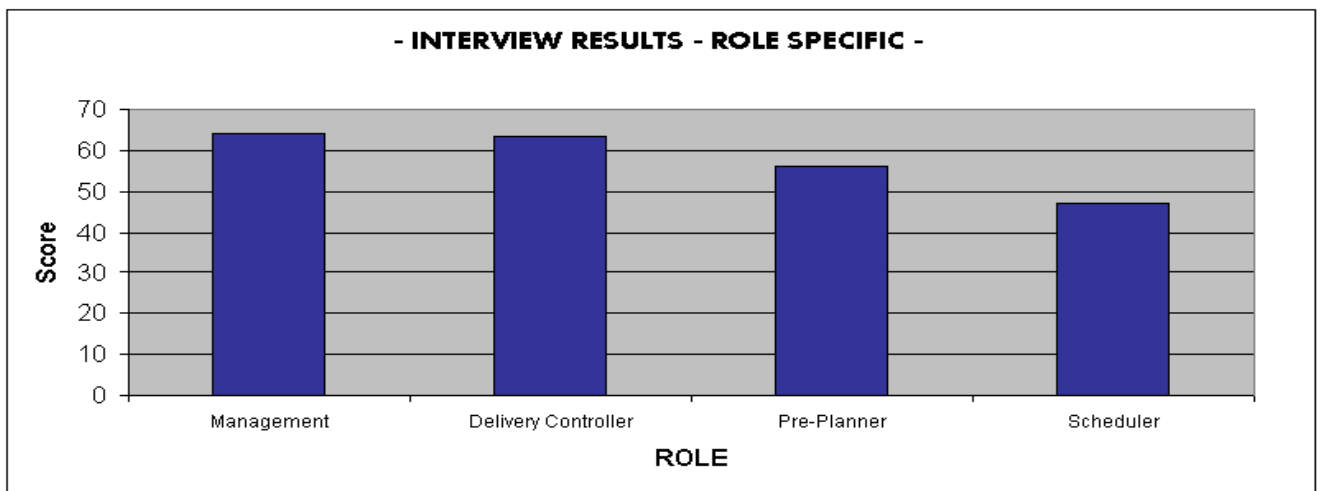
Table C.1 Interview questions



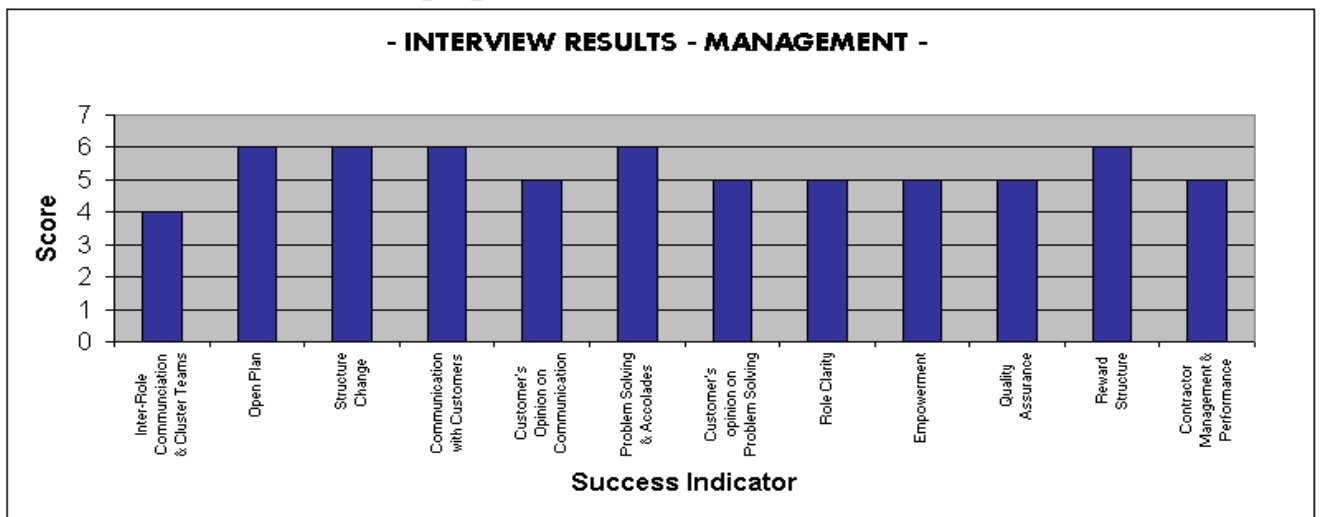
Graph C.1: Interview results - Combined across improvement indicators



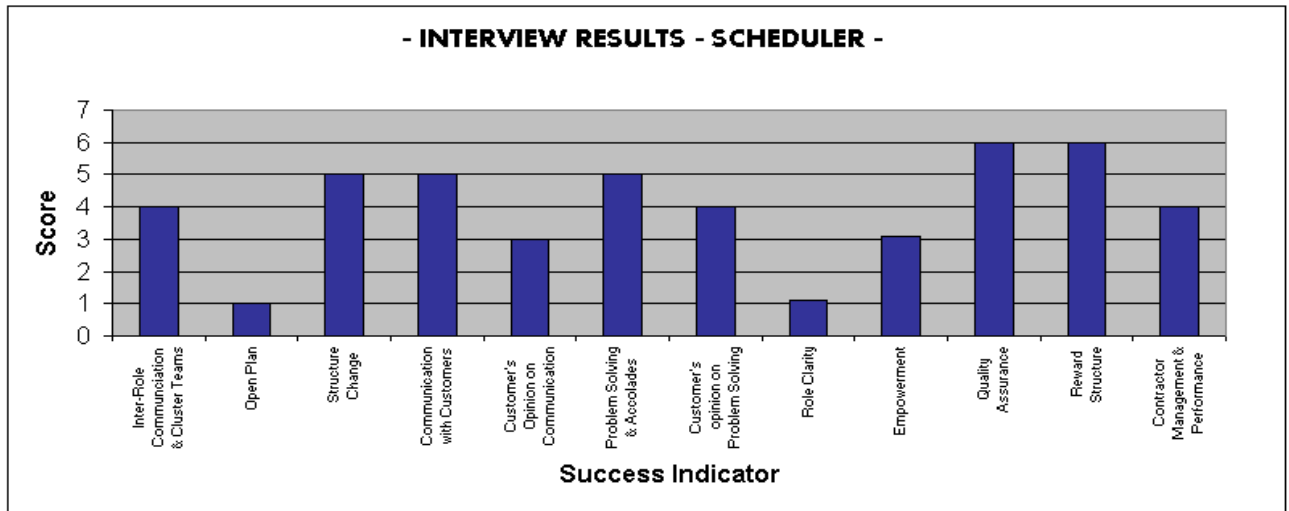
Graph C.2: Interview results – Combined across interviewees



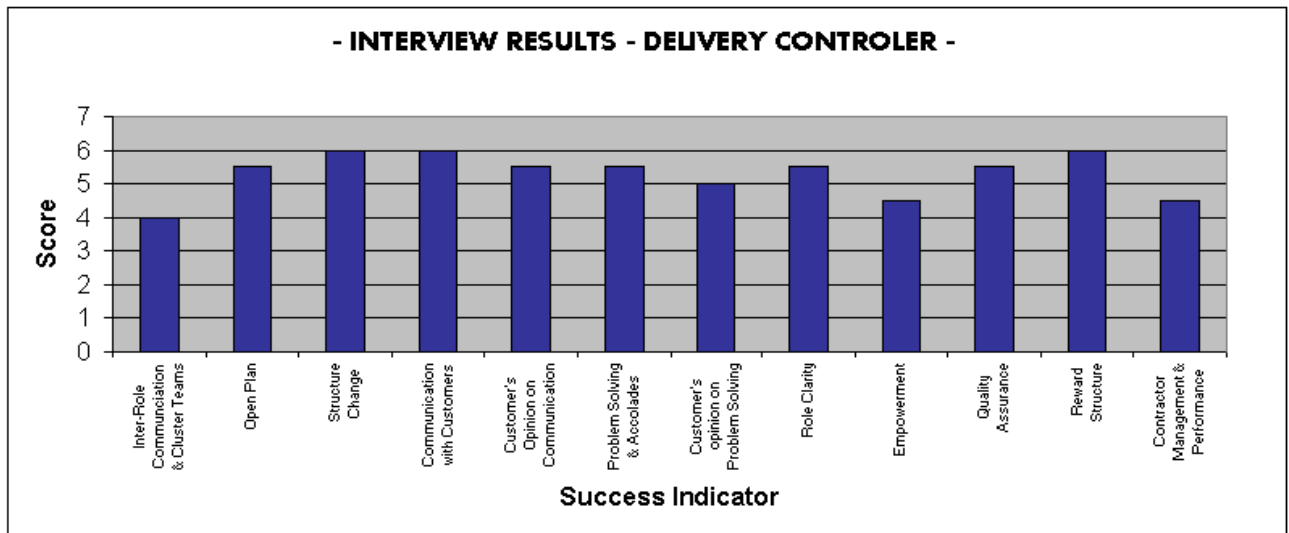
Graph C.3: Interview results - Role specific



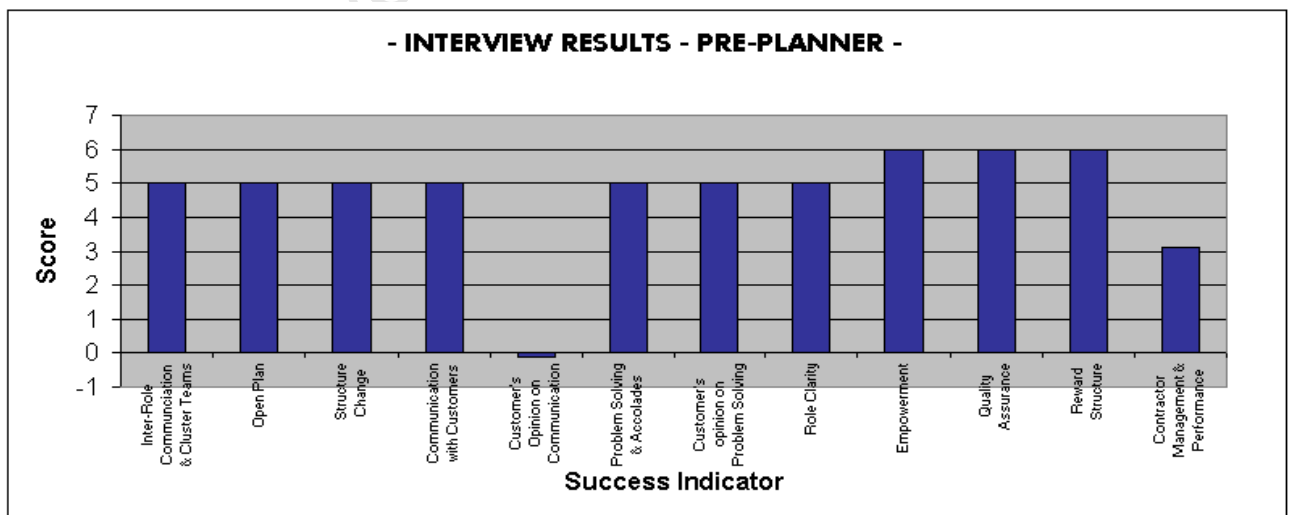
Graph C.4: Interview results – Management



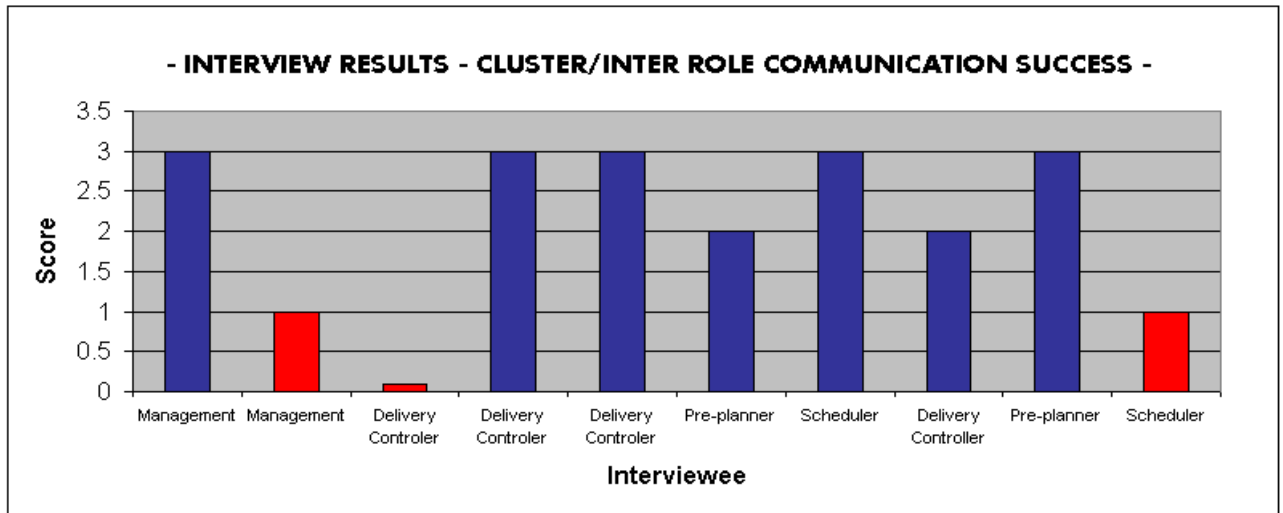
Graph C.5: Interview results – Schedulers



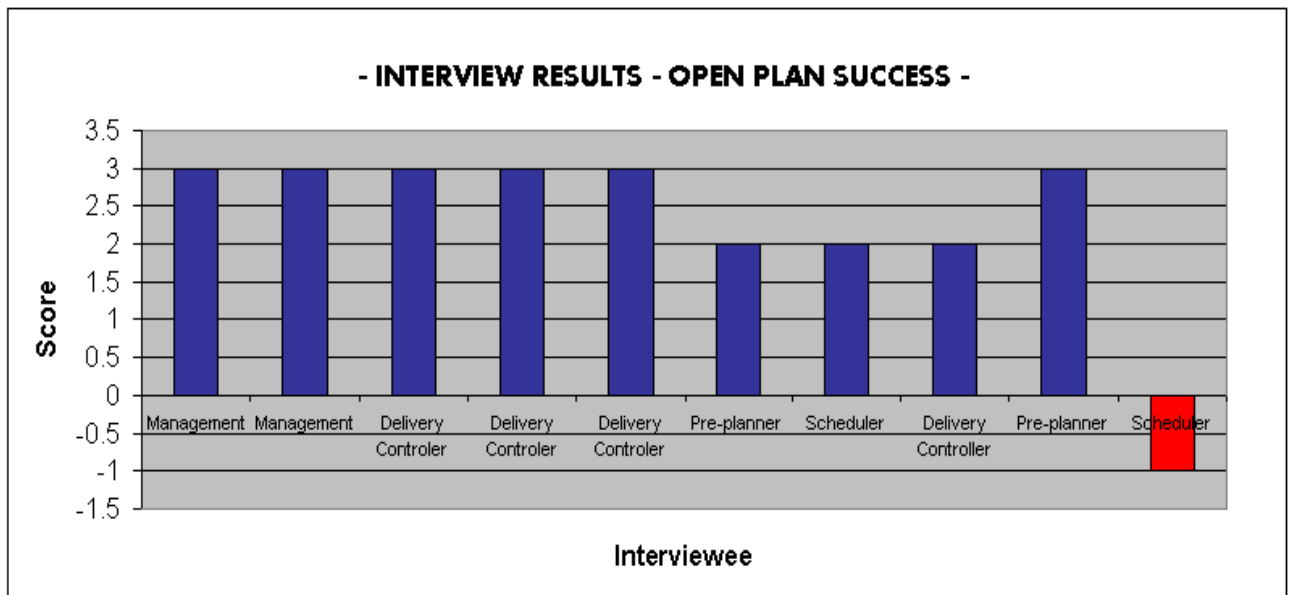
Graph C.6: Interview results - Delivery controllers



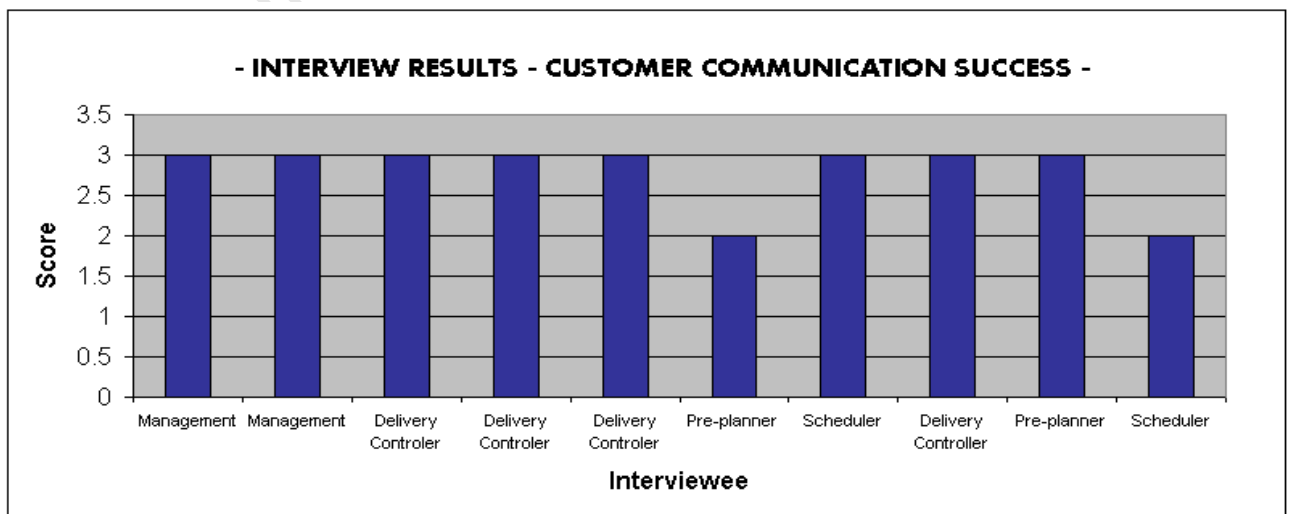
Graph C.7: Interview results - Pre-planners



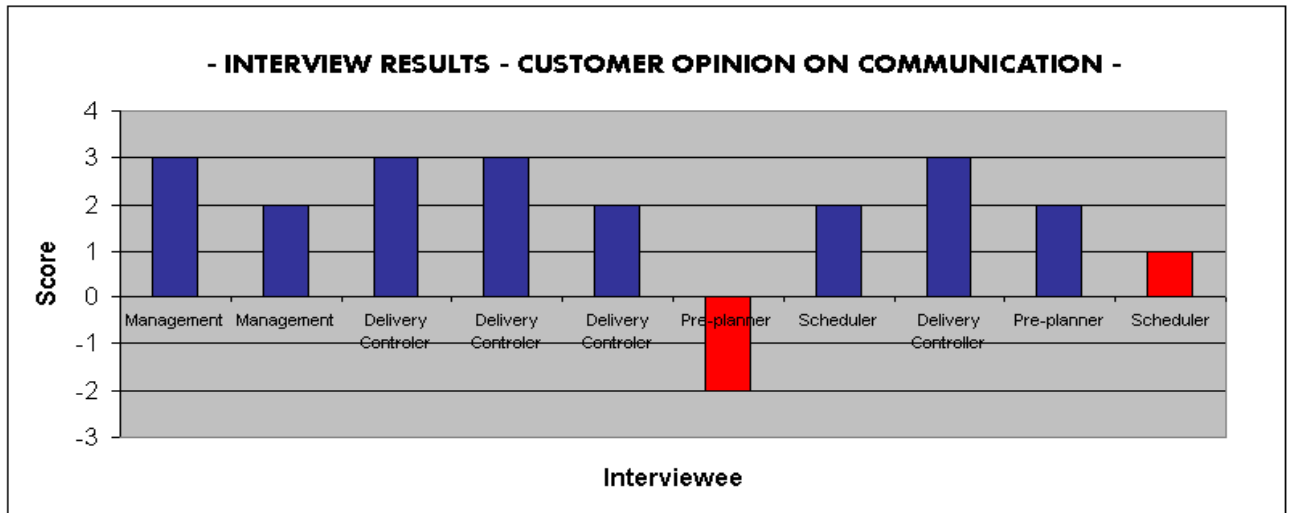
Graph C.8: Interview results - Inter-role communication/Cluster team success



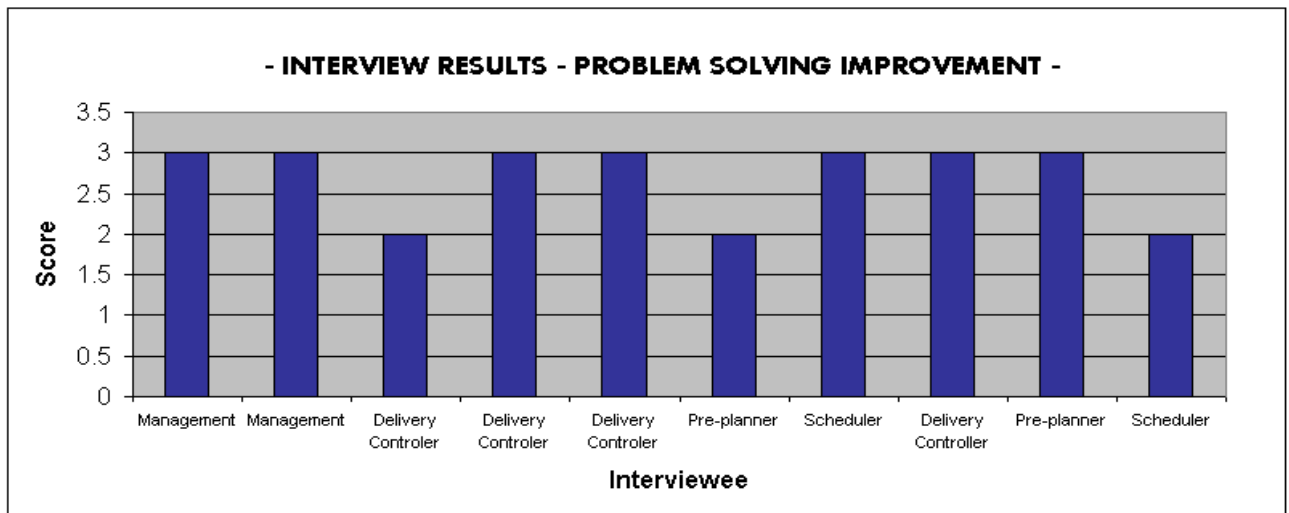
Graph C.9: Interview results - Open plan success



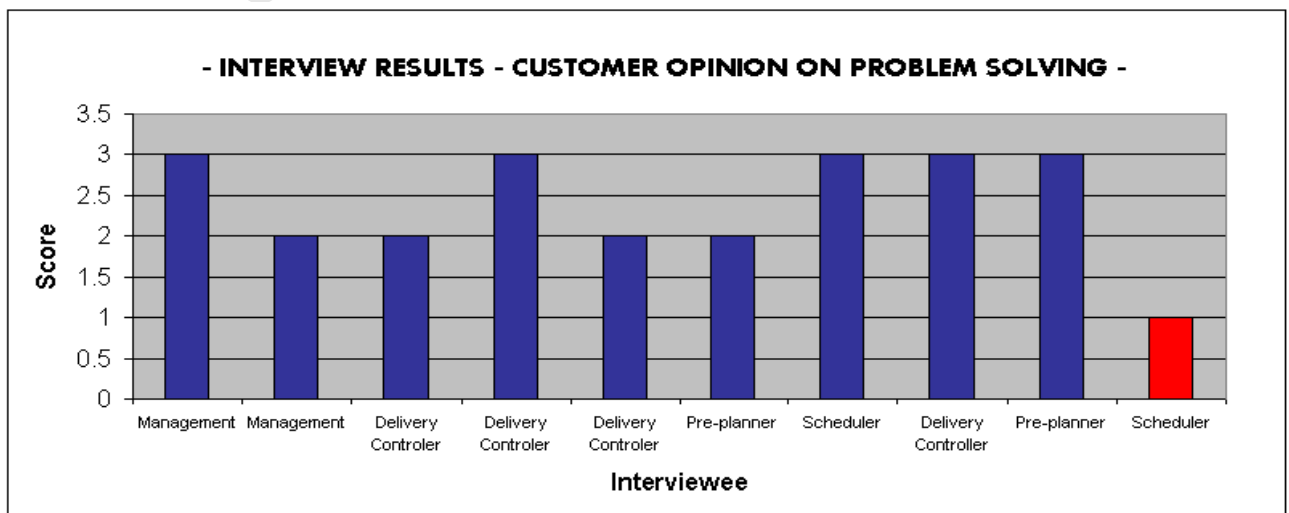
Graph C.10: Interview results - Communication success with customers



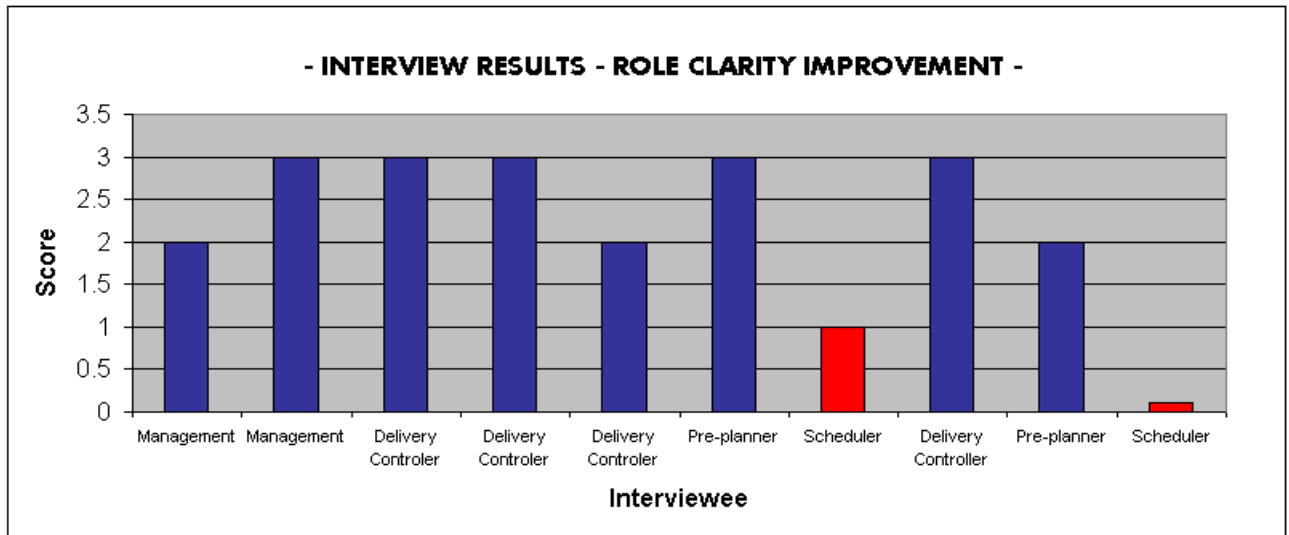
Graph C.11: Interview results - Customer opinion of communication



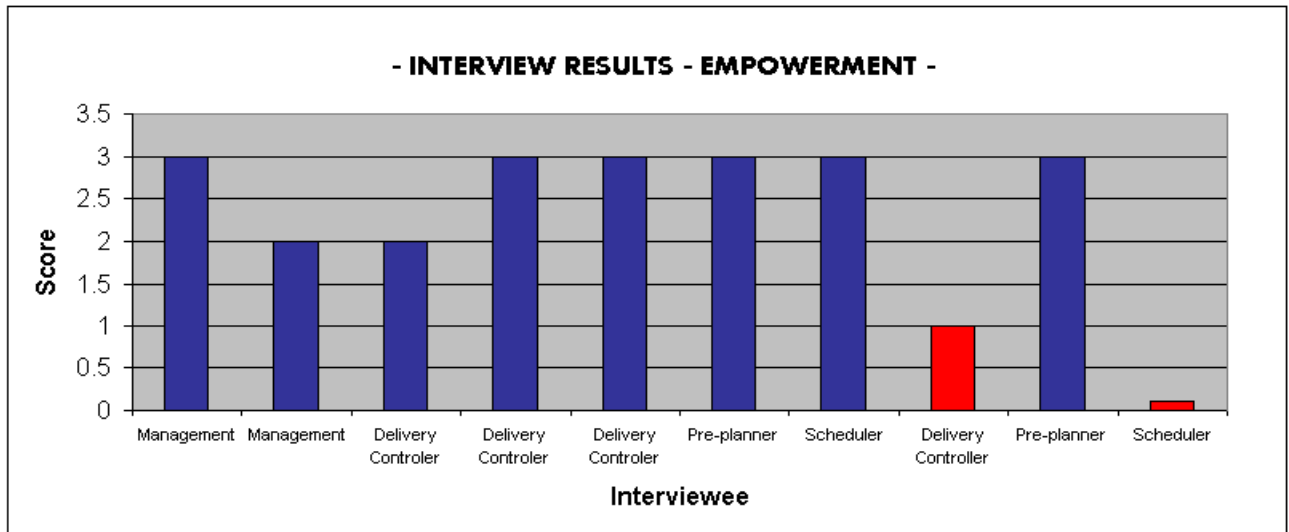
Graph C.12: Interview results - Improvement of problem solving



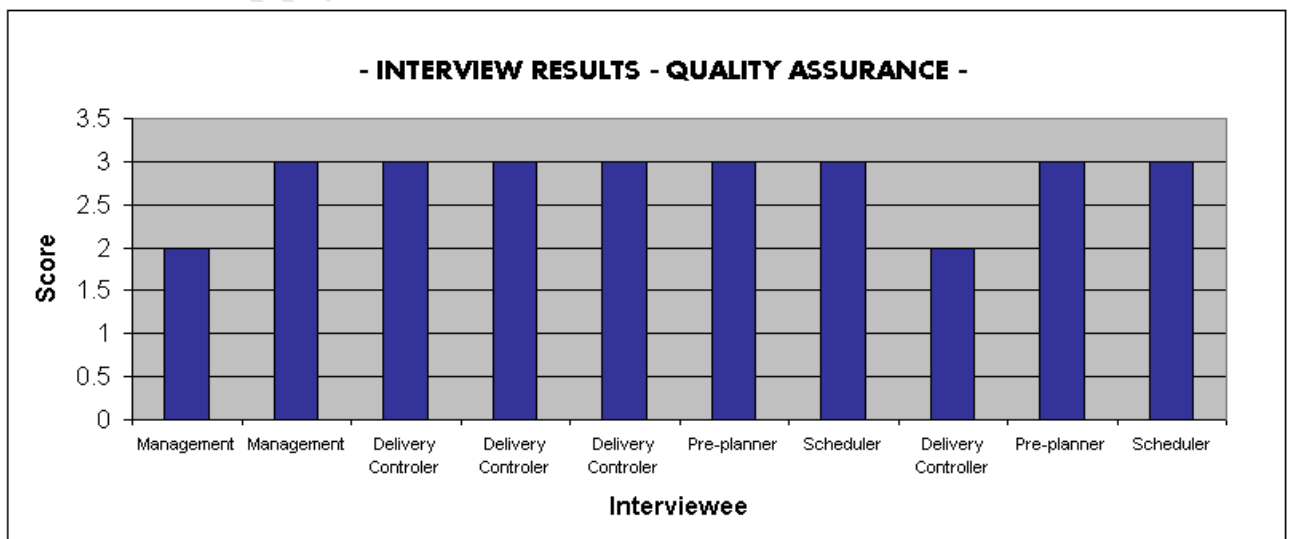
Graph C.13: Interview results - Customer opinion of problem solving



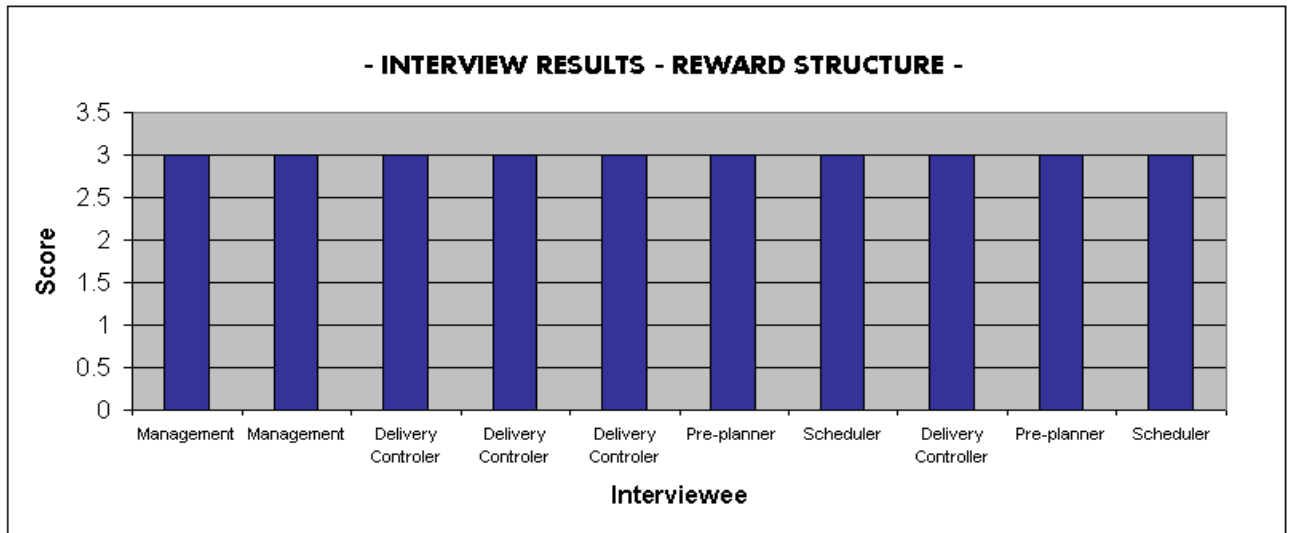
Graph C.14: Interview results - Role clarity improvement



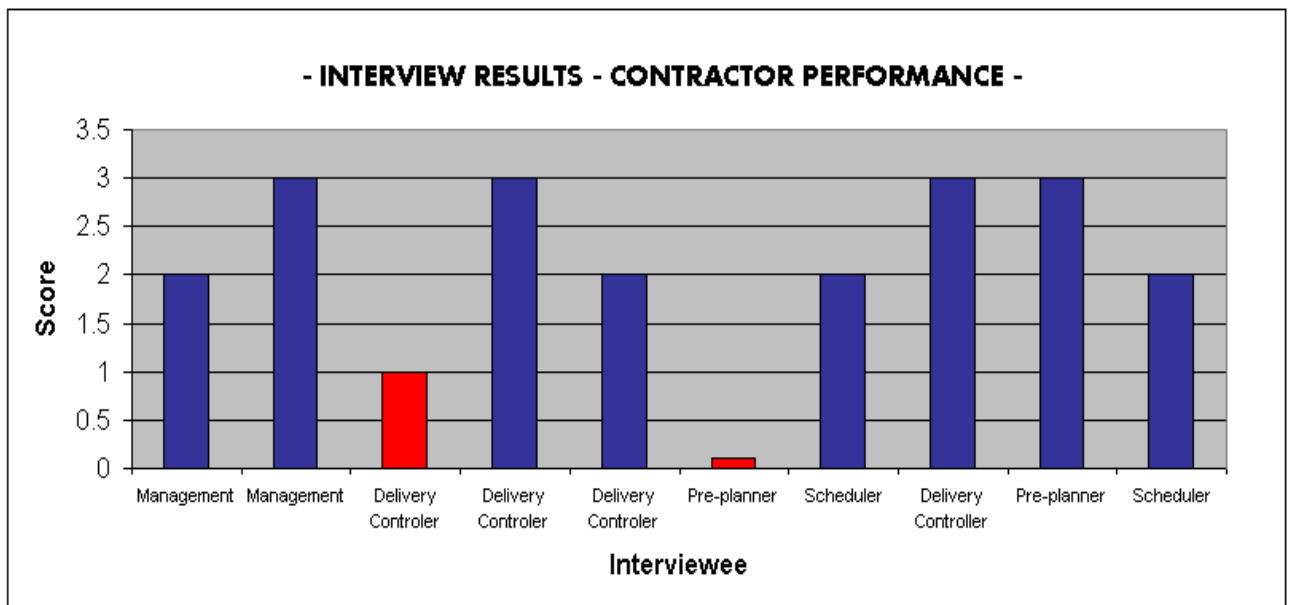
Graph C.15: Interview results - Empowerment improvement



Graph C.16: Interview results - Quality assurance improvement



Graph C.17: Interview results - Reward structure success



Graph C.18: Interview results - Contractor performance improvement

INTERVIEW 1 TRANSCRIPT:

A: INTERVIEWER

B: INTERVIEWEE

A: Okay, the first question, describe the current communication channel with customers, how does this compare to communication before the re-structure?

B: The improvement that we have now is that customers can speak directly to the problem solver **CC**. He does not have to be called back after a problem has been logged and escalated to someone else. As soon as he makes one contact with an individual, that person will run with the problem and get back to the customer straight away.

A: Can you just describe what this was like in the past, versus now?

B: The way it was before was that the problem was logged by one individual, all the information taken down, he would wait a half an hour, could be 2 3 or even 4 hours. Then someone else would phone him back try get more information from him and then problem solve only from that point and it could take 3 or 4 hours before he gets a solution. How it has improved now is as soon as a problem is identified it can be sorted straight away and you can intervene with the depot immediately when the problem arises and you can solve the problem today and not only tomorrow or the next day because of times, you know our cut-off times. **CC**

A: Okay, just to sum up that question then, I would like you just to rate the old communication channel to the new one using this, whether you feel it has improved significantly, or just an improvement, partial improvement, no change, whether it is slightly poorer, or significantly poorer.

B: Definitely a significant improvement

A: Okay, lets move on to the next question, how do you perceive customers to feel about the current communication channel versus the old one?

B: They are very happy, they want someone to listen to them and actually understand the problems that they have. It is very difficult for the customer to explain to someone who is taking their orders, the situation that they are sitting in. They actually want to speak to someone who actually knows about vehicles, knows about tank sizes, knows what the impact is on their forecourt if they don't have product. With them speaking now directly with delivery controllers it has improved it dramatically because that actually get to speak to the individual and that person is helping them to sort the problem out. **CC**

A: Right, lets refer back to the scale, would you say it has improved significantly, or significantly poorer, etc.

B: Definitely an improvement

A: Okay going on to the next question then, describe the communication channel between delivery controllers, schedulers and pre-planners, have you seen any changes since the re-structure?

B: Definitely with the way we are structured now with the pre-planner, delivery controller and scheduler in the same cluster, and sitting in such close proximity, as soon as there is a problem, they can get up and sort it out with the scheduler or the manual-pre-planner to assist them to get a quicker solution to the customer. So it's definitely you know, the time delay compared with what we initially used to have, is almost eliminated now. **CT**

A: Can you say anything about the communication between schedulers and pre-planners?

B: With them also being so close, the scheduler can advise the pre-planner on how they should be filling the vehicles, loads going in a particular direction. If he sees a gap, he can always consult with the manual pre-planner, I've got this vehicle available can't we send one of your loads earlier and maybe send another customer as a negotiation between the two of them and obviously offer a better service to the customer.

IC

A: Okay, to sum up that question can you just rate that against the scale?

B: Significant improvement! Definitely

A: Okay lets move to the next question. If you compare the old structure to the new structure and we are talking about problem solving could you describe how a problem is solved now versus before?

B: The main problem that they had in the past was that there wasn't a set problem solving tree and what suits one individual might not suit the other. They never had any, you know, they will just like trouble shoot, I will solve this problem even though it is the most expensive way to solve the problem if it worked for that individual he will immediately go there because that was the easiest solution. He doesn't have a set rule that he needs to work from, you know, one point to the next and try to problem solve. Obviously the cheapest option will be to couple the customer with another customer, but we used to tell the customer either he waits until tomorrow, or we just can't help you. There is no clear rule that he needs to work on the whole problem solving tree. So the improvement is definitely that they have a structure now and they know what is required of them. **PS**

A: Okay, just to sum up that question then, would you just rate the difference between old and new on the scale?

B: Oh, significant improvement, because they have got something to work with now.

- A: Okay, coming back to the customer, how does the customer perceive the quality of problem resolution in your opinion?
- B: The customer is extremely happy and their expectation now is that someone has to do all these things before they can get any, so there is someone who is working on their problems and all the solutions that they used to come up with, they actually see it on the problem solving tree and they can understand why the delivery controller needs this information from them. So there's more understanding from the customer's side and obviously if there is more understanding the customers will be happy. **PS**
- A: Okay, how does this compare to the customer's perception prior to the re-structure, in your opinion?
- B: Significant improvement. The reason why I am saying that, is that customers used to always be left in the dark, this is what we can do for you if you are not happy with that, you know you will have to wait for the next shift. **PS**
- A: Okay, just to sum up that question, can you rate that on the scale.
- B: Definitely significant improvement.
- A: Would you say that the staff are empowered to make decisions?
- B: Yes they are. They have got clear rules that they need to follow and we have given them power to, you know, follow through and if they are stuck in any way, they can just phone for assistance. **EMP**
- A: How does this compare to prior to the re-structure, if you are talking empowerment?
- B: Basically, they would always need authorisation to make a decision if it was to remove a customer or see if you can send a smaller load. You could never just take a decision on your own and management would back you on that, it was always: why didn't you ask for authorisation, why didn't you do this, you shouldn't have done that. There was never a clear rule on what they were allowed to do. **EMP**
- A: Whom did the staff have to approach in the past?
- B: Either the supervisor or the scheduling manager **EMP**
- A: Okay, in terms of empowerment could you just rate it on the scale.
- B: Significant improvement on that
- A: What are your thoughts regarding the current floor layout?
- B: It's actually excellent. The reason why I'm saying that is because when someone else comes onto the floor, they can immediately see the clusters, who would be dealing with a Killarney problem or an alberton problem or mossel bay problem, they can immediately go to that area and say who is the pre-planner here, who is the scheduler here, who do I need to discuss that with. **CT** If those two individuals are not there, the clusters, the support structure of delivery controllers are available there and you can immediately speak to them about the problem.
- A: How would you say that the new floor structure compares to the old one?
- B: Well, prior to the re-structuring, the management team was positioned away from the working staff and there was you know bickering and frustrations because they never saw what management did, they never saw if management got involved, and that frustrated them because they felt that they were just doing all the work from their side. **IC OP**
- A: Okay, in terms of the re-structure, could you rate it on the scale.
- B: Significant improvement
- A: What are your thoughts on open plan offices?
- B: There are pros and cons but I feel that when you have an open plan you are, everything is visible, there is openness and transparency and that is what the company wants and staff is more, how can I say more involved and they respect the, when it comes to noise level, they need to understand that there are other people in the office. You know you don't want to be treated in a certain way where you are screaming at another staff member, you need to be tolerant of every individual. **OP**
- A: How does the current open plan compare to prior to the re-structure?
- B: Well with the open plan now, the management team are positioned in the middle of the floor. They are visible to everybody, they are available to everybody, there are no closed doors, they don't need to pick up the phone to call them, and they can just see them. If they need assistance they can just put their hand up and call them over. If they have a problem with a customer on the phone, they don't need to tell the customer: I will have to get my manager to call you, they can get assistance immediately. **IC OP**
- A: Okay, and just in terms of open plan layout, how would you rate it in terms of the scale.
- B: Oh, significant improvement
- A: Describe your current roles and responsibilities?
- B: I am responsible for managing the delivery controllers, schedulers and the manual pre-planners. My other roles will either be counselling, coaching, giving them authorisation, assisting them with any problems that they can't solve by themselves. Speaking to customers if the call gets out of hand or speaking to individuals if they get out of hand and you know just being a support for them, what they need. Part of super plat is being a change agent, if there are improvements from different departments it will be my responsibility to tell them how it will impact our department and decide on the best way to introduce it to the staff.

- A: If you think back prior to the re-structure, how would you say the clarity of your roles was then? Prior to the re-structure, did you have role clarity?
- B: You know there was just the management team and the delivery control, there wasn't actually who does what. **RC** There is more clarity now, people know what is expected of them. **RC**
- A: Just to sum up that question then, where would you rate role clarity now versus the past?
- B: Definitely an improvement on that
- A: What are your thoughts regarding the quality assurance cycle?
- B: Well, the quality assurance cycle now is, its like we never had it before, there were never set rules, if you don't do this is going to happen. **QA** There was no way of actually checking if that individual followed all the rules, where he rated either, this person did a good job because he followed all these steps. Prior to the re-structure a person did a good job because the customer got a delivery, didn't matter how much it cost. **QA** Prior, if management felt he went out of his way even though it cost how much to get the delivery to that customer, even though he didn't check all the other options, if he was in favour with that manager he would just be recognised and told: You did a good job. **QA**
- A: Okay can you rate quality assurance then, past versus now?
- B: No, definitely an improvement, from nothing to so much now. **QA**
- A: Describe how the reward structure affects you and your staff?
- B: The staff have become more competitive, they have become more accountable, they talk to each other, they communicate more with each other and they are actually quit eager to find out how one individual got the upper hand on the other. It's encouraging them to deliver better quality and customer service to customers because of that. **RWD**
- A: Okay, and how does this compare to the reward structure prior to the re-structure?
- B: There were no reward structures
- A: Okay, can you rate the reward structure for me?
- B: Significant improvement
- A: Describe current contractor performance.
- B: With the new structure, we have moved past identifying the problems, we are now actually working on solutions to these problems. Prior to the re-structuring every body knew that they had problems with contractors but no one was prepared to do anything. There was no way to monitor what they were doing wrong, there was no way to identify which one was doing wrong. It was just isolated, oh this depot is giving us problems. There was nothing documented, there was no one being made accountable. Now we have moved forward to say okay these are the problem areas, these are the contractors that are giving us problems and we need to do something about it. **CM**
- A: How are you identifying day to day contractor issues?
- B: Well, with the traffic light report that we run every morning, we identify the vehicles that are being made available, but are not actually available to do those deliveries. We have identified if there is no product at the depot and we have made people accountable to say okay if you say this vehicle is available why is it not and we have people who we can talk to, to say this is what is going to happen now as a result of the vehicle not being available. Senior management is also aware now that we are having problems in those depots because of the contractor performance. **CM**
- A: How does this compare to prior to re-structure?
- B: Well prior to this improvement, if we had a problem with the contractor, the problem would be e-mailed to a supervisor and no one would hear about it again, it was just left. **CM**
- A: Can you rate the contractor performance on the scale?
- B: There has definitely been an improvement we are seeing now the change over from one contractor to the next because of bad performance and we feel that we played a big part in that because we delivered on stats that they weren't delivering from their side. **CM**
- A: That is the last question that I have, is there anything that you would like to add about the re-structure of the department?
- B: I think the morale of the people has changed. They feel that they are part of a team now and they are proud of the department. They have got some power, and they know what they are doing and they know what is expected of them now. So that is a big change.

INTERVIEW 2 TRANSCRIPT:

- A: INTERVIEWER
B: INTERVIEWEE

- A: Okay, thanks for agreeing to be interviewed. This interview is for a thesis and the answers that you give will be totally confidential and you will remain anonymous in the research. The questions are around the re-structure of the department so what I will do is ask you a question and then I will ask you to give it a rating based on the following options. Okay, so lets go with the first question then, describe the current communication channel with customers?
- B: There I will put it down as a significant improvement because there is now more feedback to customers. **CC**
- A: Can you just describe the communication channel, how are customers communicating with the department?
- B: In our department they would phone in to log a query of process for a run dry or potential run dry. They then give the delivery controller all the information, what the problem is, so the delivery controller has to make a time commitment with the customer to say I will phone you back at a specific time and then it is to phone him back at that time. Previously there wasn't that great communication, we would just say: we will advice you later during the day, which would mean that the customer would be phoning back. **CC**
- A: In the past, who was the customer talking to?
- B: The customer would get through to orders and then they would take details and then they would come through to delivery control.
- A: So is this the CSC itself or the customer?
- B: Yes,
- A: Okay lets move on to the next question, In your opinion how to customers feel about the current communication channel?
- B: The way that I see it is that they are feeling much more confident and more trustworthy because they believe in what we tell them because there is a communication of getting back to him and advising him of whether it is good or bade news, negative or positive, he is being kept in the loop of what is happening. **CC**
- A: How would you say this compares to the customer's feelings before the re-structure?
- B: Well I think that now he feels much more important, he is not being left out in the cold to wait for the delivery or waiting for some information to come on hand.
- A: How do you think he felt before?
- B: Probably just another number, another customer. I don't think that he got that special treatment, or coming through to a person whether it was orders or delivery, now there is a dedicated team that deals with his problem, that takes it on hand, they are the ones that are informing him.
- A: In terms of the customer's feelings before and after the re-structure, what would you rate it on the list /scale
- B: There is a big improvement, the customers feeling now is that I am important, I am being called, there is someone actually looking after me.
- A: The next question, describe the communication between delivery controllers, pre-planners and schedulers?
- B: I won't say that it has been a great improvement, there has been a partial improvement with that, with the pre-planners and schedulers in the recent past, there has been a significant change there, there's more communication between the two of them with their planning, which vehicles to use, which customers and clustering. From delivery control's side, especially with the depot masp, because they deal more actively with the pre-planners and the schedulers, that's also been some improvement there, but there are still a few gaps that we need to concentrate on. **IC**
- A: When you say partial improvement, what are you referring to specifically?
- B: Then I am referring to the gaps that there are because there could be like with delivery control, they might be looking at the schedule and they are seeing that there are vehicles available and when they phone the depot they find that the vehicle has not been made available, so they don't go to the scheduler with that info, where you aware of this, so there are gaps still room for improvement. **IC**
- A: Describe how problem solving takes place currently?
- B: Currently the customer would phone in to the IVR, he has a problem with his load he has not received it or he is running into difficulty so he would then come through to delivery control, the delivery controller who receives the call will assess all the information from the customer gather his dips, what his daily off-take is, his tank capacity, whether its am or pm, gather all that information, they have template which they would use to make sure that they gather all the information and then from there, they will then try to see how they can assist. He has a procedure or process, the decision tree, he will then go through the tree and see which option is best or how he can best accommodate by either checking the existing schedule, vehicles available, LOB's or customers with whom they could possibly cluster together. **PS**
- A: Okay, how does this compare to problem solving prior to the re-structure?
- B: Prior, I can't say much because I wasn't involved in delivery control but from experience the calls would go through delivery control and I don't think that there was a set procedure to try this option then that option. They would just look at the schedule, is there space or not. I don't think that there was much process. **PS**
- A: So just to sum up that question, how would you rate the change in terms of problem solving prior to the re-structure to post re-structure based on the scale?

- B: Significant improvement
- A: Okay lets move on to the next question, How do you think the customer perceives the quality of problem solving prior to and post re-structure?
- B: There has been a big improvement, more that the customer is now being kept in the loop with his deliveries with his failures, if there is a cut on his delivery that we are sending him, he is being informed about those. He is not just receiving a delivery and then finding out, oh I have been cut, nobody phoned him, nobody told him and that is what was coming back previously was that I didn't know nobody phoned me, nobody told me anything. There is an improvement in that we are keeping him informed keeping him abreast of changes. **PS**
- A: Okay and how would you compare quality of problem resolution to how it was?
- B: Oh, it can't be compared, there has been a remarkable change. There has been a very big change and I am sure that the customer knows that if he contacts delivery control he is going to get an answer or he will be assisted. **PS**
- A: Moving to the next question, are you and the staff empowered to make decisions in the current structure?
- B: Yes, most definitely with regards to deliveries, taking customers off to accommodate another customer, or bump for a customer who is running dry and that is part of the decision tree. They have the power to make changes unless there is going to be a huge cost involved they would get the supervisors or yourself to come and step in and say okay lets authorise this to get the load out, but the staff have the power to make decisions. **EMP**
- A: Okay, if you think back to prior to the re-structure, how would you describe the level of empowerment of staff?
- B: I don't think, I wasn't in the department at the time but from what I saw and gathered then, any changes that had to be done to the schedule, had to first go via a supervisor or their manager before they could make and drastic changes to the schedule. **EMP**
- A: So how would you rate the empowerment against the scale?
- B: I would say that it is an improvement. If you didn't have something in place before and now you have, it also just boosts the staff because they know that they don't have to first go there, does my job really have worth, so there has been a good improvement there. **EMP**
- A: Okay, what are your thoughts regarding the current floor layout?
- B: Well, its good, I like it, I enjoy it, there is lots of freedom, lots of freedom. There is no manager sitting in his own office with the door closed. Staff are much more open, more friendly. They can go up to a supervisor or manager or each other with any problems or queries. There are no masks or hidden agendas here. I like the way that it is setup. **OP**
- A: And how would you say that this current floor structure and layout compares with how it used to be?
- B: The new layout is fantastic. The old system, the old layout was very boxed in, like them and us. It was the management team, you would have to go out and around the corner to them, they were never approachable. Now its open, and with any problems or queries they can go directly to Brian or to the Supervisors to get any information that they need. So that makes a big difference to staff where they know that the ability is right there. It's a huge difference. **IC OP**
- A: Does the open plan noise not effect performance at all?
- B: No, I think it actually enhances it because of the way that the floor plan is set up, especially with the teams, where the delivery controllers are sitting. They are now able to ask questions to each other, or just bounce something off the other one. Or I might, or they might overhear each other and say but that's not right, this is what you should have done or why don't you do that. So I think in that respect it is fantastic, they have these open channels, not a big board blocking them off. **IC OP**
- A: Just to sum up that question then, can you rate it on the scale?
- B: on my list, oh, significant improvement
- A: What are your thoughts on open plan offices in general?
- B: Well I like it I think that it is a good change. If there were more offices in the rest of the company that would go that way, it would be a huge difference, because they still have the high screens, where I sit behind and you work there and I work here. **OP** There is no openness, or communication across a barrier or talking and then there are still offices that are closed off. I wish more would come down and look at our floor and see how nice this is, you know.
- A: How would you rate open floor plans on the scale.
- B: The old structure was very poor, it wasn't friendly, it wasn't open, and there wasn't that visibility. Now it is right on top of the scale. **OP**
- A: Just very briefly, in half a minute, describe your roles and responsibilities.
- B: Okay, my role as quality assurance advisor is to ensure that the processes are followed correctly from delivery control to the pre-planners to the schedulers, that they are logging the processes correctly, that they are adhering to them. Then when we do the feedback we also identify where there are training needs, gaps are identified and to see what changes need to be made going forward and to start implementing them.
- A: How was the role clarity then, prior to the re-structure?

- B: It wasn't clear then as there was never a quality assurance role then, so they had what was required of them, but there was no measurement **RC**
- A: Okay I think I need to rephrase the question, how well or how badly did you perceive people to understand their roles prior to the re-structure?
- B: I don't think that there was much clarity as to exactly what was expected of them or a set target of, this is what we are going to measure you on. It was never broken down and explained what needs to be done. Now there is a clear definition of exactly what is expected of them, how to achieve it and to be consistent with that. That has been a big change because now you can actually see what it is you actually have to do. Before they had a vague idea, DC's for example were just assisting customers with queries. Now there is a definite role. **RC**
- A: What are your thoughts regarding the QA cycle?
- B: I actually want this QA role to roll out to the rest of the business so that they can see just how important this role is. **QA**
- A: So how would you compare the current quality assurance to the quality assurance of the past prior to the re-structure?
- B: There wasn't quality measuring prior to this. So there wasn't anything to really compare. **QA**
- A: So how has it changed in terms of the scale?
- B: From significantly poor prior to a huge improvement
- A: Describe how the reward structure affects you and the staff?
- B: How it affects me, I get quite excited when I am doing the QA putting in their KPIs each week, I get quite excited when I see those that have been lagging behind, once they get their feedback, oh this is where I need to improve and then they come up into the top three. So that's good to see and it also boosts the individual because they are also being recognised and the reward structure really puts everything up there and it makes the others think, hey she or he came in the top three I can also do it. So I think it is a great motivator **RWD**
- A: Can you compare this reward structure to reward structures prior to the re-structure?
- B: Previously it was non-existent so it was poor non-existent there. There has been a huge improvement now, I mean it's like it is there now, it is active, used and everyone is happy with it. So something that was non-existent to something that is being used, staff are happy with it and they are working towards that. It is a huge improvement. **RWD**
- A: If we talk about contractor performance I would like to ask you to do a comparison between this department's influence over contractors prior to the re-structure and the department's influence now after the re-structure, contractor performance?
- B: I won't be able to give you much because as you know I have just started recently, but from what I gathered when I was on the floor in the service centre then, if we ever logged a call and a customer had a problem with deliveries it would come through delivery control. I don't think that they ever had the power to use a contractor from outside, I don't think there were, but a few had to go via the scheduling manager. He had the power to say okay we will use this contractor or that one. At the moment we have contractors now and the agreement is in place and they have come on board now fully. There were a few hiccups and ups and downs. The relationship now with the contractors is that they know where we are, they know what our requirements are if we want to deliver to our customer they are on the same page. There is no kickback or what am I going to be getting out of it. **CM**
- There is no dictation, where I am only going to be doing two customers for example. That is the buy in that we have at the moment. **CM**
- A: Okay, so how would you rate the influence of the department over contract management on the scale, before and after the re-structure?
- B: From prior slightly poorer to now a significant improvement
- A: Is there anything else that you would like to add in terms of the department re-structure that we didn't cover or didn't talk about?
- B: I can't think of anything off hand because we have covered most of it but if there is anything else I will let you know about that, but previously, its been a good change, the whole re-structuring the floor plan the open communication, its been a good move

INTERVIEW 3 TRANSCRIPT:

- A: INTERVIEWER
- B: INTERVIEWEE
- A: Okay, thanks for agreeing to be interviewed. This is an interview for my thesis and it is regarding the department re-structure. It is particularly important for me to interview people such as yourself who have been in the old structure and have a good idea of what changes have taken place so the questions are all around the changes. So what I am going to do is to ask you a question and then refer you to this list.
- A: So the first question then is, describe the current communication channel with customers?
- B: Basically, I am talking about before and after. Before it was never a direct communication with customers. **CC** If the customer had a

problem he would communicate with the floor (CSC) and the floor would send an e-mail and then we would see what we can do for him. There was always, like a three way communication. Communication now is a direct way of communicating which is much better because the customer gets a prompt response. He gets an answer from the person who is responsible for his answer. Before he could speak to anybody and three or four people would be responsible for his problem. **CC**

A: So there is single point accountability now?

B: Yes

A: Based on how you have just answered this question, can rate for me the changes with regards to customer access on this scale?

B: I think that it is a significant improvement. What I liked is that gradually I had to change as well. Before, I didn't have to take responsibility for the customer. **CC** At the moment it is a two way thing now, as soon as he calls in me and him are partners to resolve the problem.

A: Interesting way of putting it!

B: So we then work out a solution with regards to solving that problem at the end of the day. So the communication structure is better.

CC As a consumer, when I want to get an answer I don't want to speak to somebody who is going to liaise with somebody else. So that direct communication is a better way of working and having the customer in mind, focussing on his problem, at the end of the day, his situation affects my situation. So if he goes out and makes money, the company makes money and I in turn get a salary.

A: Okay, lets talk about how the customer feels now regarding the communication channel that has been created. In your opinion how would you say the customer feels about it now?

B: I think that the customer feels that he is more valued. **CC** He actually is more valued, the way things are changing now, because at the moment, the way that I have it is that the reps still give the customer the wrong information. Before, like I said it was a lot of people trying to resolve one problem. At the moment it is a one way communication, the information that he needs he gets from me and he gets the correct information first hand because I am the one who is going to help him out. So I think in that sense, if I take it from a consumer point of view, I mean someone who is going to solve my problem first hand, shucks I will go back there again because you know that is where I got my problem solved the first time.

A: In you opinion how did the customer feel about the communication channel prior to the re-structure?

B: He wasn't happy and he wasn't sad. If was like a normal thing basically, it wasn't an improvement on anything it was just a way of doing business. There was no means of improving the communication or improving the way that we do business basically. Or having the customer valued at the end of the day. So it was just business as usual. So things have improved, we are improving on our service and I think that the changeover was a bit unsettling for staff and customer because he was used to the way things were before. But now since the change a year or so ago, you can see there is a change in the way that customers speak to you. They appreciate the way that things are going instead of the way that things were. **CC**

A: Okay, did they talk to you differently in the past?

B: Like I say I didn't speak to customer before, but since the changeover, you get customers who were unsettled with change just like everybody is unsettled with change, you get customers who were also unsettled, but you don't get that anymore.

A: Okay, so lets rate that question then, in terms of the customer's feelings prior to and post the re-structure how would you rate it?

B: There is a significant improvement

A: Describe now the communication between delivery controllers, schedulers and pre-planners?

B: With regards to that I think that there still needs to be work done. My opinion is that there is no improvement with regards to that because I see it from an accountability point of view. We are accountable for what we do so if the pre-planner makes a mistake we are accountable for that mistake. If there is a mistake with what the scheduler has to do we are accountable for that mistake. **IC**

A: So there's an accountability issue still?

B: Yeah

A: Okay lets talk about the communication, have things changed in terms of the fact that you are now sitting together.

B: Okay, yeah, there is change basically, but I mean, not a significant change because I have been working with them for some time now.

A: What would you say needs to be improved there, what can management do to improve the communication between the three roles

B: Communication there is now problem, one of us makes a mistake we can go and speak to that person, we are all adults that's the one thing that I like about it. We all accept our mistakes so with regards to that I don't think that we have a communication breakdown where we try to hide something from the next person or something, so with regards to the three roles in our department I think that we have great communication. **IC**

A: Next question, describe briefly the difference between problem solving now and in the past.

B: I think that it is basically the same, because we had a structure back then **PS**

- A: Can you describe that structure?
- B: We had the problem solving tree basically, we had the basic ingredients, but which order are you going to put it in to get the perfect recipe from that, so we had that ingredients but I think now things have been more detailed.
- A: So how would you rate that problem solving changes
- B: I would say that it is an improvement, there is still lots of room for improvement **PS**
- A: Lets go back to the customer now, in your opinion how does the customer perceive quality of problem resolution now versus in the past?
- B: I think that they are much more, I mean, before we never got the accolades that we are getting now, basically customers are not calling back to get feedback we are calling them. You can see the change in the customer as well, he is appreciating the service. It might not always be what he wants, but we are getting back to him as promised. **PS**
- A: So how would you rate the quality of the customers perception of the quality of problem solving?
- B: Like I said it is an improvement but there is still lots of room for improvement, we are changing with regards to improving our service and the customer calls back to say that he appreciates that. **PS**
- A: What are your thoughts on empowerment prior to the re-structure and empowerment now?
- B: I think there has been a change with regards to that, before it was a matter of coming in and not being valued and that was it. At the moment we are given more opportunities than what we had before. The only problem is that we as staff do we take advantage of those opportunities. Ok, this is just my perception, as a managerial structure, you give opportunities to employees, and it is their responsibility to take advantage of these opportunities. Whether you are, you know, it's not, what I am saying now at the moment you are, I mean, our structure has been doing that. The fact of the matter is that I have taken advantage of those situations, those opportunities. **EMP**
- A: Where were the opportunities in the past, before the restructure?
- B: No
- A: No?
- B: Ya
- B: Like I mean, take this SOPAF thing, now, I mean, Wayne has out me on the one for Kimberley, you know, so I mean.
- A: Brilliant
- B: Ya
- B: That allowed me to fly for the first time, the only time in my life.
- A: Oh, really
- B: Yeh
- B: We must do that more often. Ok, excellent
- A: How did you find that then?
- B: It was a bit nerve racking, because I mean, you know you hear a lot of stories prior, from everybody, got different views with regards to flying. I was a bit nervous and excited at the same time.
- A: Can I just steer you back to the original question regarding, I want you to just comment quickly on empowered in problem solving. Has there been a change in the level of empowerment prior to the restructure verses now?
- B: Ya, because the fact of the matter is when there is a problem, ok, hmm, you are more empowered to solve that problem, instead of running to a manager and getting his opinion with regards to that. **EMP**
- A: Ok, so how would you rate that empowerment prior to verses now?
- B: Hmm, partial improvement, I mean definitely still, you know, more room for improvement with regards to that. **EMP**
- A: What can management do to empower you guys more if you saying there has been a partial improvement, what can I do in terms of my management team?
- B: Ok, ya, basically, you know with regards to me, those opportunities have been set, viewed and like I say it has been given there. I asked, listened, and went for those opportunities, and whether the other employees have been doing the same, you know, I don't know. I don't see that because most of the time, you just hear this, that and complaining. But the thing is, what I am saying is that, you guys have given us opportunities.
- A: Hmm
- A: Where we listening, and have we asked for those opportunities? You know what I mean?
- B: Yah
- B: So I mean basically, you know, from your side I don't think there is much you can do, except you know, keep on giving.
- A: Prior to. ...
- B: Yes, and hopefully they will listen. Because you know the thing is, I mean I, if I wouldn't have gone to Kimberly, if hadn't listened and

asked about the SOPAF thing.

A: Yah

B: So the opportunities where there for me. And it is there for everybody else as well.

A: Yah, absolutely. Ok .We spoke about customers and communication channels and the communication between you and your colleagues, the different roles in the department. Lets Talk about the floor layout. Think back to how the floor was structured, and to how it is structured now. Can you just give me your thoughts on the current floor layout verses the old one?

B: I think it is much better, because there is much more concentrating on a specific area, before it was like a maze. Now you have a structure with which to deal with. An area where you gain expertise, and you focus on that area. **CT** Not like you hopping from the one side to the other. So the structured layout is far better than the one we had before.

A: Ok

B: I think there is a significant improvement. Like I say, you focus on one specific area, and you concentrate on that one area.

A: Lets just dig a little deeper into the office plan. What are your thoughts on open plan offices in general?

B: I actually love it. You don't want it work in an international company and only know the person who works next to you in your office which is actually a mirror next to you. Because that was the way it was, I mean, back in the old days, I had a office and if you had a mirror in there, you'd be the only one there. So open plan is far better, because it allows for freedom. It allows for room to breath, and you get to see everybody and life itself within the office. **OP**

A: Ok. Can you rate open plan office to how it was?

B: I think it has been significant.

A: Lets talk about role clarity. How clear are you about your current role. What was the difference in clarity of your role in the old structure, as opposed to the level of clarity in the new structure?

B: Basically in the old days it was a matter of coming to work and answering the phone and focus on that specific problem coming through. With regards to things now, it is a way of improving on that. So you are given the opportunity of improving on that call coming in so concentrating on a certain cluster, you get expertise on that specific cluster, you get how can I say, you become more valued. **CT**

A: Were you clear about your role in the previous structure?

B: No, my role was just to come in and take calls and solve problems. **RC**

A: So there is more clarity now?

B: Yes, now I have been given an opportunity to improve on my role. Before I never had that opportunity. **RC**

A: So how would you rate role clarity in the new structure as opposed to the old structure?

B: I think there is a significant improvement; It's not a matter of me coming in and solving a problem. There is now a delight factor. **RC**

A: Brilliant. What are your thoughts now on the quality assurance cycle now, verses quality assurance cycle in the old system?

B: I think quality assurance is very important in any business structure; I think our department in the MCD who has quality assurance. If you don't have someone measuring quality assurance you are down in the dumps because we never had anyone do that before. **QA**

A: Ok, how was it in the past?

B: Basically, everybody just worked as normal.

A: Doesn't sound like there was anything.

B: No, like I said there was no focus on quality. Now with regards to having the customer in mind, there is that quality that comes into play and that's where that service excellence comes in. You can see the change in the customer as well because we focus on quality, and the service we provide must be quality **QA**

A: Quality assurance, how would you rate it past to present?

B: Significant improvement. The only way you can improve is to get more quality assurance. **QA**

A: Ok

A: Lets talk about the reward structure. How does it affect you?

B: Basically before we never had a reward structure prior to the restructure.

A: How did that make you feel

B: It was not an issue until I found out that the previous manager used to just take out the Schedulers for lunches, he does not worry about us on the floor. So whenever there was something to be said or celebrated, he would take the schedulers out and not delivery control.

RWD

A: Ok, so you are saying that the schedulers were more important.

- B: But basically that is what he used to do.
- A: So there was only a reward structure for a select few.
- B: Yes.
- A: What would you rate the reward structure prior to and post restructure?
- B: Definitely, significant improvement
- A: If you talk about the department's ability to effect contractor performance, out there, what has been the change prior to the restructure? Let me give you an example, there's significant contractor route cause problem and it gets escalated to the scheduling department to try and resolve, did things happen in the past or did things try and happen to change it, do things happen now to try and change it?
- B: Before it was just like, basically things get done now these days, and I don't know if I would like to say with regards to what I told Bridget as well, we have a goal in the company, our department has a goal. What is the contractor's goal, if we want to be the customer's first choice? Are they helping us to be the customer's fist choice? What are we doing about that? So before there was never a focus towards that.
- CM**
- A: A: So you say that there is more focus now?
- B: B: Not more focus, but we concentrate more on getting them on track to go that way. **CM**
- A: A: Excellent, How would you rate our influence on contractor performance prior to and post restructure?
- B: B: It's been an improvement, but I would say a partial improvement because there is still lots of room for improvement, with regards to the contractors get in their mindset. Because I mean all these years, they have just seen a retail site, and dealing with problems with a retail site. They have never seen a customer, so at the moment we have changed from viewing a retailer to a customer, so have they changed their mind set? **CM**
- A: A: That's the last question, so before I close this interview, would you like comment on the restructure. You don't have to comment.
- B: B: The way things were before and now, things have improved. Things will change and have to change because if we don't we stagnate and we don't want to do that.
- A: A: Thanks a lot.

INTERVIEW 4 TRANSCRIPT:

- A: INTERVIEWER
- B: INTERVIEWEE
- A: Right thanks for agreeing to be interviewed. This interview is for a thesis and I am going to ask you some questions about the department re-structure so I will ask you to think back to before, to do a comparison of what it was like before versus now.
- A: First question, describe the current channel of communication with customers, how does this compare to communication before the re-structure.
- B: The MASP didn't exist before, we are now available 24/7 whereas previously be weren't. The calls were not taken directly by delivery control, before it was the call centre and it was referred or delivery problems would be referred via an e-mail system. Now the customers come directly through to us so it's a one stop. They would come through directly to the service provider so that communication channel that has changed where they don't have to wait an hour before they get feedback, they will get feedback immediately. **CC**
- A: Okay, on this rating scale that I have put before you where would you rate the...
- B: Significant improvement
- A: Why would you say that?
- B: Because the feedback came directly from the customer that they are very happy that they can speak to delivery control directly and not have to go via PAL (CSC) were we have the expertise for example the schedule, we have it so we are able to immediately give them the information that they require.
- A: This leads into the next question, how do customer feel about the current communication channel?
- B: They are very happy with it because we speak directly with the depot, we have the schedule at hand, were like I said, before they would have to wait. A call back would have had to be done, whereas now they get an immediate answer, live resolution. **CC**
- A: How would you rate customers feelings about it, in terms of the scale?
- B: Significant improvement

A: Describe now the communication channel between DC's, schedulers and pre-planners, have things changed since the re-structure?

B: Yes, it has, before, I can't speak for the pre-planners but I can speak for delivery control. We found that in the past there was a gap between the schedulers and delivery control. "Don't speak to me", "go via the depot". You had to speak via your team leader to a schedule whereas now that gap has been closed where we have the depot person who deals directly with only one person. **IC**

A: Can you comment at all about schedulers and pre-planners?

B: Yes they have a good relationship. They communicate with each other, which trucks are available for example, they come first, the pre-plan customers come first, so there is that relationship with them that if they cannot schedule then they will make a plan

A: What was it like before if you think about where the people were sitting in relation to each other?

B: Yes, they weren't sitting together, whereas now they sit right next to each other. They sit in a cluster now for example the Alberton scheduler will sit with your Alberton pre-planner as well as your Alberton DC cluster, so there is no longer traffic up and down, the people are close by and everybody is kept informed of what is going on. **IC CT**

A: In terms of communication between the roles, how would you rate the relationship changes on that scale?

B: I would say significant improvement because previously the schedule would be done and because there was that gap the customers were scheduled, vehicles were scheduled that weren't available. Customers, there would be uneconomical loads, even pre-planners whereas now that gap has been closed so you are not getting that at all anymore.

A: Describe now how DC's problem solve and how does this compare to how it used to be before the re-structure, so we are focussing now on the problem solving aspect?

B: As I said before the customer would call in to PAL, place their order and say listen I can't wait for the due date I have got a delivery problem. They would log it and I would get all the information, which I will come to as far as the problem-solving tree is concerned and the call would then be referred via the system through to delivery control. Delivery control was given an hour to get back to the customer so we would then go and check on the referral system and for each cluster for example Alberton cluster would look at the Alberton referrals and that is how it was handled. So there already we are losing time for about an hour whereas the customer could have been given feedback immediately, **PS** for example you are on schedule, the truck is on the road and you have confirmed that with the depot. Whereas now the customer calls through directly to delivery control, they will log a delivery problem. The problem solving tree that you introduced to the department for example the customers distance the size of the vehicle that can access the site, if we can't assist him when can we assist him. You know all the basic guidelines that you gave us, I feel that that has helped us more now than in the past because there wasn't a guideline, there wasn't a set procedure for problem solving as there is now. **PS**

A: So, in terms of problem solving, can you rate it on the scale?

B: Significant improvement

A: how does the customer perceive the quality of problem resolution and how does this compare to the customer's perception prior to the re-structure?

B: If we could not assist the customer then we will tell the customer, Mr. Customer we have a problem solving procedure that we deal with and we have done everything, I mean if we have gone through the problem solving tree you can't hire another spot hire to assist the customer. They are aware of this problem solving tree because some of them will say but did you find out if there is a vehicle because that's the feedback they are giving. So they trust us, the trust the problem-solving tree. **PS**

A: Okay, so how would you rate quality changes?

B: I would say that's a significant improvement, because they can go back to that delivery controller and say hang on did you do this for me or that. **PS**

A: Okay, lets talk about empowerment now, are you empowered to make decisions and how does this compare to prior to the re-structure?

B: Yes we are because at the end of the day it depends on the delivery controller to make the decision. There are certain guidelines that we also have to follow, but before I would say that we weren't. Everything that we wanted to do we had to first go via management. And that is every decision! **EMP**

A: Okay, in terms of empowerment now how would you rate that on the scale?

B: I would say significant, can I just mention that before the schedule had to be prioritised y the region, for any price change whereas now because we follow procedure, the prioritisation procedure, they cannot just come and change the schedule based on a buddy buddy system, and to me that is what was happening before. **EMP**

A: Okay, lets talk about the structure of the department now, what are your thoughts regarding the current floor layout and how does this compare to how it used to be?

- B: I think that there is more interaction, for example I mentioned earlier that the relevant clusters are sitting with each other, they are not scattered all over the show. **CT** And it's open, we don't have partitions separating us from management, which is very open to communication.
- IC OP** One feels you can approach whoever you need to approach whenever you need to. There is not that closed door policy in other words.
- A: The current floor layout, how would you rate that in terms of old to the new?
- B: Significant improvement
- A: What are your thoughts on open plan offices in general and how does this compare to prior to the re-structure?
- B: Let me give you an example, if you are new to a department like new delivery controllers that start here and it wasn't an open plan and they were put in the Witbank cluster for example, they would never be able to build a relationship between the Island View cluster and the Killarney cluster because they have never had to interact with them, whereas now everybody knows what is going on, it is open, you speak to whoever you need to. Whereas before you had to, the schedulers were, I felt they were unapproachable because they were marked as you know, you cannot approach them you had to go via your manager or team leader, Grant at the time. But now we can. **OP CT**
- A: Okay, open plan offices, where would you rate that on the scale?
- B: Significant improvement
- A: Okay, lets talk about role clarity now, in half a minute describe your current role and how does the clarity of your role compare to before the re-structure. So if we talk about how clear your role is now versus prior to the re-structure. You can use the DC one because you have just changed jobs.
- B: Well, in terms of clarity, before things changed all the time, we were told this is how you are going to work shifts, you are going to work a standby and you are going to work shifts **RC**
- A: Was this prior to the re-structure?
- B: Yes, I would go to our manager and they could never give me on paper what our job description was. Whereas what happened with the new re-structuring, we were told this is what you are going to be doing, that was pointed out to us, whereas before I was never told this is what is expected of you. Now we are told this is the quality expected of you, this is what you need to do, and you are going to be rated on it.
- RC**
- A: In terms of role clarity then, how would you rate it?
- B: That is significant improvement, without people telling you what to do you are not going to know what your strengths and weaknesses are at all. **RC**
- A: What are your thoughts regarding the quality assurance cycle, compare this to quality assurance systems before the re-structure?
- B: There was no quality assurance, there wasn't anything like that before **QA**
- A: What do think of the QA system now?
- B: I think that was a significant improvement in the department. Like I say you are coming to the department, you are coming here to work and you are coming here just to do a job and you don't know whether you are doing something right or wrong, its going to turn into a habit, it might even be a habit that is not good for the department and having that person telling you or the quality assurance advisor telling you, his is what you are doing wrong, or this is what you are doing right and you can improve on that and i will assist you. So there was nothing like that before. **QA**
- A: Describe how the reward structure affects you. How does this compare with reward structures in the past?
- B: prior to the re-structure there was no reward structure. What they used to do is take us out for dinner. That was it, with your partner. There was no reward structure Brian. **RWD**
- A: What do you think of it now.
- B: I think it's great, and if you work hard then you get recognition for it. I know because I won top performer last year and I mean I sat here for three years in a row thinking to myself how do I know if I am doing a good job without the customers telling me that, and it didn't even get noted that the customers are telling me this. Whereas now an e-mail gets sent when a customer calls in to say Tanya did a good job and we get recognised for what we are doing and I think that is very important. **RWD**
- A: How would you rate the reward structure versus before?
- B: Significant improvement
- A: Describe current contractor performance. Just think about the contractors performance, management of the performance by scheduling department before and after the re-structure. Has the department actually affected contractor performance.
- B: Yes it has, I am going to give you an example, price change. Norm: drivers take off sick, before we could never phone the contractor management, we would inform management and then they would phone. **CM**

- A: Weren't you allowed to?
- B: Not that we weren't allowed to, we didn't know that we could, so the intervention came, you had to, remember you asked me earlier could you make the final decision, well it never happened. Hello you cannot do that, certain people could do it, others couldn't **CM**
- A: Okay, that's interesting. Okay rate our influence on contractor performance?
- B: Significant improvement
- A: Lastly, I want to ask you do you have any other comments about the re-structure that you have not mentioned?
- B: If I think of anything can I come back to you? The main thing is, since the change the attitude previously was, "you placed your order late!". You know that attitude, whereas now it has changed, we are here to help the customer that is why we are here, whereas before, there was this attitude that we are doing the customer a favour.
- A: Was that coming from management downwards?
- B: It must be, whereas we are here to provide a service to the customer and we are not here to wrap them over the knuckles. You see that was the thing, now we are not allowed to talk to the customer like that. I have to help him that I think is the one great improvement.

INTERVIEW 5 TRANSCRIPT:

- A: INTERVIEWER
- B: INTERVIEWEE
- A: This interview is for a thesis, so it's a research interview. It has to do with the re-structure of the department so what I am going to do is to ask you some questions around that and get your idea on things and then I will ask you to use this rating scale to rate each topic that we discuss.
- A: So just to kick off I want you to describe the current communication with customers and compare this to communication before the re-structure
- B: Two simple things, firstly there was no communication with customers, we just spoke to the depots and compared to now where we have full communication with customers. We now speak to them one on one and this is a complete change from what it used to be.
- A: If you look at the differences between the two before and after how would you rate the change now since the re-structure
- B: In terms of that I think it is a significant improvement, because at least now we get a basic idea of the customers needs, they can explain exactly to us the situation that they are in and for us to be able to a much better job, in a more efficient way **CC**
- A: To the next question then, how do you think customers feel about the current communicating channel and compare their feelings before and now?
- B: I think we bought over the customers from whence they came, us not being able to speak to them and they used to get frustrated not being able to voice their opinion or their needs **CC**
- A: Was that before the re-structure?
- B: That was before the re-structure, and I mean now one still gets those customers who are not happy but I would say 90% of them are very happy with the communication that we do with them. Because we are in charge of the schedules and in contact with the depots so we have a better idea than I think anyone else so that we can feed them you know with the proper information that they require and that is all that you actually need at the end of the day. **CC**
- A: Okay, and if you had to rate the customer's perception, what do you think the perception change has been on that scale?
- B: I would say improvement, bordering on improvement and significant improvement because I think that they are still buying into us
- A: Describe now the communication between delivery controllers, schedulers and pre-planners, have things changed since the re-structure in terms of that communication if you think back to how the department was structured?
- B: I think that it has changed drastically for the better because now its open and its not channelled anymore when you focussed just on one section of your job. **IC** It all interlinks now with one another and we know what their job description is and they know what we do so it obviously opens up a whole new line of communication, which is obviously to our advantage. **CT**
- A: Okay if you had to rate the communication now between the three roles?
- B: I would say that it definitely is a significant improvement
- A: Okay, describe how you problem solve and compare how you used to before the re-structure?
- B: okay, before the re-structure we actually had no control over the problem solving. It was just about taking our orders to the scheduler and him having to sort out the problem. Perhaps not even sorting out the problem, if there was space on the schedule. Now its open, we use the

problem solving tree which is something really great that has happened to the department because we have got the tools, I mean that is the right tool for us to be able to do our job properly. And it is all in our hands; we have been given so much to work with so it's really a great improvement. **PS**

A: Okay, can you just rate problem solving before and after

B: Significant

A: How does the customer perceive quality of problem resolution do you think and how does this compare to how he perceived it before the re-structure. We are talking about the quality of problem solving?

B: Before, we weren't involved in the problem solving and customers weren't aware of the length, or rather there was no structure set up so they couldn't really rate us and tell us compared to now with the accolades where customers phone in to thank us and obviously that recognition in knowing that we go the extra mile, or not even going the extra mile, its part of our jobs knowing that the customer is appreciating what we do for them. This is a drastic change compared to the past. **PS**

A: Okay, can you rate the perception of quality before and after the re-structure?

B: I would say an improvement because it is not just 100% all of the time due to certain circumstances.

A: So there's room for improvement

B: Yes there is

A: Lets talk now about empowerment in the department and I want you to compare firstly are you empowered to make decisions and the how does this compare to before the re-structure?

B: We are totally empowered to make decisions and you feel completely in charge and accountable for everything that you arrange with regards to customers. Before we never had that at all. It also empowers you as a person and gives more meaning to your job description or what you do **EMP**

A: Someone had to have empowerment in terms of problem solving so who had it before?

B: I would say that the schedulers had it before, delivery controllers were just there, the go between, they didn't have any power at all they just basically, the schedule ran smoothly it wasn't as involved as it is now **EMP**

A: okay, how would you rate empowerment on that scale?

B: A significant improvement

A: What are your thoughts regarding the current floor layout? How does this compare to how it used to be?

B: It's much better. The openness and us being able to communicate and see everyone around us, people that we need to talk to or to discuss things with are right there you know, right in front of us. **IC** Whereas before it was all dark and gloomy, there was just like this whole, but now it is all bright and open. A complete change.

A: Can you rate that for me?

B: Significant improvement

A: What are your thoughts on open plan offices in general and how does the current open plan compare to how it was structured before?

B: Before it was isolated, delivery control was on its own, even management was far from where we were and basically I thought that they couldn't even see what we were doing. And I mean those are the people that we need to communicate with and they need to know what is happening every day, every single day, all of the time. Compared to now where everyone and everything is at hand, from top management right down to delivery control, the go between everyone is there. **OP** The way it is structured is perfect especially with the cluster thing, we have new clusters, its easy communication, the communication has changed so much. **IC CT**

A: In terms of open plan then, how would you rate that on the scale?

B: Definitely significant

A: In half a sentence describe your current roles and responsibilities and we are going to talk about role clarity now, how does the clarity of your role compare to the clarity before the re-structure. Is there a difference?

B: Yes definitely, its more structured and also with the procedures that are in place, it makes it easier for us to do our jobs. Before there was nothing like that set up, there were no real KPI's either, so you know you were just doing your thing, basically handing in a request and that was it. **RC** There was no real function or in point format if you can put it that way. The description of the job wasn't really defined like it is now. Now we obviously have everything, its right there. All the functions that you need to do are much more clear than what it used to be. **RC**

A: Okay, can you rate the clarity for me then on that scale?

B: I would say that there is an improvement but it could be improved more. **RC**

A: What are your thoughts regarding the quality assurance cycle and compare this to the previous QA system that was in place before the re-structure?

B: I think that we have an excellent tool that we are working with, with QA with the sheets that we are filling in checking our contacts and

that sort of thing, compared to before where there was absolutely nothing like that set up. There was no monitoring of contacts. You basically didn't know what was happening with regards to employees with their performance. It is a good thing to have that because you only want to improve for yourself so at the end of the day it is an advantage to the whole department in the role that you play here. **QA**

A: Can you rate the quality assurance on that scale?

B: Very significant improvement, but there is a lot more that we can still work on **QA**

A: Still growing?

B: Still growing! But it has grown very fast in a short time.

A: Okay let's talk now about the reward structure. Describe how the reward structure affects you, how does it compare to reward structures prior to the re-structure?

B: Okay, prior there was no reward structure, I don't think there was anything that you could be rewarded for in the first place. But now its just that you are doing your job and you are going the extra mile and you are being compensated for your effort and I think its really great and it keeps the competition up between the employees. You want to strive and you want to get to the top, but you also want to be rewarded at the end of the day. And for you to do that you obviously have to put more effort into what you do **RWD**

A: Okay can you rate the reward structure?

B: It is a significant improvement

A: Describe the current contractor performance. Whether the scheduling department has changed our influence on contractor performance, so do a comparison of how it was before the re-structure and now.

B: There is definitely an improvement because before, we didn't even have contact with the contractors. Now it has opened up and now we at least know what is going on, we can keep tabs on what is happening and before we never had that, because we are now in contact with the depot and sometimes with the drivers so it obviously opens up a whole lot more. I am sure things will improve even more in the future. **CM**

A: Okay, can you rate our influence over contractor

B: I would say its an improvement

A: Okay those are all the questions that I have. I just want to ask you finally if there is anything that you would like to comment on regarding the re-structure, either positive or negative that you would want included in this survey?

B: I don't think there is anything negative at all about any of the improvements since the MASP started, I just think its growing and it is getting bigger and bigger. At the end of the day it is never going to just stop there, there is always going to be something that you could add and that is only going to be an advantage to the department. The whole change I think is great.

INTERVIEW 6 TRANSCRIPT:

A: INTERVIEWER

B: INTERVIEWEE

A: This is a survey for a thesis, and I just want to ask you some questions regarding the re-structure of the department and then I am going to ask you to rate each question based on that rating scale

B: Okay

A: Okay, the first question is, describe your current communication channel with customers, how does this compare with communication channels before the re-structure of the department would you say?

B: Improvement

A: Okay, would you just answer the question first and then you can rate it

B: Okay, I like the fact that the customers can't get through like they used too, it makes our lives much easier even though some of them still try their luck and try other routes. It is much easier than the phone ringing all the time like it used too, so definitely an improvement **CC**

A: How would you say that customers feel about the current communication channels, we could be talking about the direct access to delivery control as well, so I want you just to think about the whole department in general, how does this compare to the feelings of the customer before the re-structure? Remembering that you were in the customer service centre at the time, try to think back to those days before the customers had direct access, what was it like compared to the direct access now?

B: I think that it has gone down because they can't get through. My impression is that they are very frustrated, especially at peak times, price change, during crisis, they are very frustrated, I don't know why they struggle so hard to get through but they resort to other measures. **CC**

A: And before, were they better off?

- B: Beforehand, I think it was easier for them to reach us because before delivery control came along they were able to reach us and we handled all the problems and I think that delivery control is great, but I think that the frustration level of the customer to get through is a big factor. **CC**
- A: How would you rate that perception of the customer in terms of, what would you think the customers would rate us in terms of communication?
- B: Poorer, just with trying to get through, you know
- A: Let's talk now about the communication between the delivery controller, the scheduler and the pre-planner, I want you to think back to before the department was re-structured, do you think that there has been a change in communication between the three roles?
- B: Yes definitely! It has definitely improved, there is still room for improvement, but it is much better. I think management has also been pounding it in to keep us notified. I would say definitely an improvement. **IC**
- A: Okay, describe how the DC's problem solve, how does this compare to what they were doing in the past, before the re-structure?
- B: Mm, I don't see any difference now as to before as far as their problem solving, I think it's, I think it depends really on who you speak to and I think it was the same before, if you get someone who is jacked up, you know who really wants to try and make an effort, they will make a difference. **PS**
- A: Did they have decision tree in the past?
- B: I don't think so, I don't think they did. I personally don't see an enormous difference because like I say it depends on who you speak to.
- A: Okay, rate the problem solving before the re-structure and now after?
- B: I think there is definitely an improvement
- A: you sounded doubtful, partial improvement?
- B: No I would say improvement, not partial. I think that there really are still people out there who are not willing to go the extra mile for you, me or the customer
- A: Okay, lets talk about accolades now, how does the customer perceive the quality of problem resolution now as apposed to before the re-structure, do you think?
- B: I don't actually know to be quite honest. I don't see a huge difference in the way that we are treating our customers before and after. I think it is more internal where the big changes have been made. My feeling again, it depends on who they get through to. If they get through to someone who wants to make a difference then, you see what I am saying?
- A: Yes
- B: Okay, rate the customer's perception of the quality of problem resolution?
- A: I would say improvement.
- B: Where has it improved?
- B: In managements involvement. I think that is a big factor and also being pushed to exceed or to excel, I think that has been a big play
- A: Are you empowered to make decisions and how does this compare to your empowerment before the re-structure? You can do a comparison even between where you were at and now.
- B: Yes, definitely a significant improvement. I feel like I am allowed to do my job and run with it, where I need to and if I get stuck I can always turn to management. I would say it's a big improvement. **EMP**
- A: Okay, lets talk about the structure of the department, what are your thoughts regarding the current floor layout and how does this compare to how it used to be. Do you remember how it used to be laid out?
- B: Yes, the cubicles and everything.
- A: Give me your ideas on that.
- B: Mmm, I like it because we can all see what everybody else is doing, it's more open. My only issue is the noise level, but I would say it is definitely an improvement, we are not cut off from each other.
- A: What are your thoughts about open plan offices in general, and how does the current open plan compare with prior to the re-structure?
- B: I like it, I like it I think it much nicer because we are all pretty much on the same level as far as the way that we sit and work. **OP**
- A: Okay open plan offices in terms of that rating scale? Where does the open plan situation lie on that scale, changes in terms of the open plan?
- B: Improvement
- A: Okay, Mmm, let's talk about role clarity now. Do you feel that you are more clear about your role now as apposed to before the re-structure, or the other way around?
- B: No definitely, it is definitely much clearer now, all the way across the board. **RC**
- A: Okay, what are your thoughts on the quality assurance cycle, compare this to the quality assurance system of the past?
- B: There wasn't one when I started and Terry took it and ran with it and now Tammy has just picked up where she left off. What I think is

so good about it is the clarity, we all know where we stand with it and I think it has also been implemented. Everything that was set out has been implemented which is great, I would say definitely a significant improvement. **QA**

A: Okay, lets talk about the reward structure now, describe how the reward structure affects you and how does this compare to reward structures of the past, prior to the re-structure?

B: I think it is excellent, really excellent, we are motivated and we know that there is, even though we work for our money, there is something extra to work towards, I think it is very good for motivation. **RWD**

A: And prior to the re-structure, can you do a comparison?

B: There wasn't much at all. If I remember correctly, you had also not been there long when I came in and I think you were talking about all of this and it is implemented now so I think its great. **RWD**

A: Okay, then the last question is around, do you feel that the scheduling department has changed in its approach to contractor performance or what do you think of?

B: Are you referring to OVO's or?

A: No, no, no our influence over contractors. Do you feel that there have been changes since the re-structure?

B: I think so because everyone is very much put in the same basket, I don't think that there is a difference in the way that the temps or contractors are treated.

A: No, I am talking about, okay not contractor staff, I am sorry I didn't explain myself well, The actual delivery contractors, the transporters.

B: Okay, Mmm, I don't actually see that much of a difference/

A: Rate it for me?

B: I would say maybe a partial improvement **CM**

A: It sounds to me like you are saying no change?

B: Yes, yes, the problems are still there and yes.

A: Okay that is the end of the questions now I would just like to ask you one more thing and that is would you like to add anything to this survey, any comments about the re-structure, absolutely anything at all, positive or negative?

B: I think that it has brought new life into the department and I think that everything that you set out to do you have done, I think it is very commendable and I think that it is running really well, and we can all turn to our management if we need to so, I feel that there is a very good structure in place.

INTERVIEW 7 TRANSCRIPT:

A: INTERVIEWER

B: INTERVIEWEE

A: This interview is for a survey which will contribute to my thesis, so I am going to ask you some questions about the department restructure, so I am going to ask you to think back two years, basically before and after, it is a comparison to before and after. So lets kick off with the first question then.

A: Lets talk about communication in the department and particularly communication to customers, how do you think the channel of communication with customers compares between now and the past?

B: Much better now, Mmm, in two ways that I can think of: The SMSing that has been implemented and then also the phone out system that has been upgraded and the record keeping of documentation. So I would say that the whole of the communication was improved by 80 to 90%. **CC**

A: If you think back to how it used to be in terms of customer access to the department, can you comment on that?

B: Yes, it wasn't controlled at all, customers phoned in as they wished and with queries, whereas at the moment we are having the IVR system and where they get a lot of answers on line so they don't have to phone in to speak to delivery control or scheduling **CC**

A: If you were to rate communication now on this scale, the previous structure to now where would you rate it?

B: (Pause) The old structure I would rate significantly poorer and the new structure I would rate as significantly improved.

A: Okay, how do you think customers feel about the current communication channel into delivery control because remember in the past we didn't have direct access, what are your feelings on the customer's thoughts around that?

B: I would say that customers in a way are satisfied with being able to speak to the right people for their query, but then also I would have to say that sometimes the lines are a bit clogged up and they can't get through, so there is a bit of unhappiness there **CC**

A: Okay, if you had to rate the customer's feelings now on the, in terms of direct access to the department where would you rate it based

on what you have just said?

B: Definitely improved

A: Describe now the communication between DC, schedulers and pre-planners, have things changed since the re-structure?

B: Yes definitely, Mmm, before the re-structure especially between DC and the schedulers, there was just about no communication or very poor communication, whereas we are sitting in the new cluster now and having a pre-planner with you so that you can communicate right through the day with you and then also the DC. **CT** The DC handling phone calls all day long, queries and problems, I am being in a position to overhear those problems and I can give direct input into the problem or query. Whereas previously there was nothing like that. **IC**

A: Okay, have things changes at all regarding schedulers and pre-planners?

B: Yes, definitely there is a much bigger bond between the scheduler and the pre-planner working closely together **CT**

A: Okay, if you had to rate the communication now between schedulers, DC's and pre-planners on that scale?

B: Significant Improvement

A: Okay, Mmm, lets talk about problem solving now, okay the delivery controller's problem solving, how does the problem solving compare now to how it was in the past?

B: Okay in the past, one thing that has come out of the new millennium or the new method of doing things was the set procedure as to do things. In the past each person in delivery control sort of did the best he thought practical for the moment, whereas now you have a set procedure and a decision tree to follow so each problem will be handled in the same way in the correct method, which is much better. **PS**

A: Okay, rate problem solving for me in terms of..

B: Significant Improvement

A: Okay, how do you think the customer perceives quality of problem resolution? How does this compare to the customer's perception prior to the re-structure?

B: There was no perception or very poor perception because they always thought that they were put off, will get back to you and we never got back to him whereas now the moment the customer phones in with a problem, the problem gets handled on the spot and he gets an answer either positive or negative, but he gets an answer on his problem immediately. **PS**

A: Okay, how would you rate that then/

B: Also a significant improvement

A: Mmm, lets talk about empowerment in your, your empowerment in the department, are you empowered to make decisions and how does this compare to prior to the re-structure?

B: Prior to the re-structure, I was empowered in a way, or I was told I was empowered, but I could hardly even make a decision without being challenged in what I did and how I did it and, whereas now I have the power to make a decision and I am normally backed by my decisions. **EMP**

A: Okay, if you could rate empowerment before versus after?

B: Also a definite improvement

A: Lets talk now about the structure of the department, what are your thoughts regarding the current floor layout, how does this compare to how it used to be?

B: Before, we had management on one side having their meetings and their whole operation behind doors and we never knew what actually happened whereas today the management is working as a team with us, solving problems and giving input right through the day, each day. **IC OP**

A: Okay, how would you rate the current floor layout versus the old one on that scale?

B: Definitely, significant improvement

A: Okay, lets talk about open plan offices in general now, what are your thoughts about open plan offices, how does the current open plan of the department compare with how it used to be?

B: I would say that the open plan has its benefits and its negatives. The benefits being that we are working as a team and you work together with the rest of your team, mmm with management involvement all along, that's quite good, but the negative side of it is the noise level and sometimes there is a bit of lack of concentration because of the noise and the whole commotion going on. **OP**

A: Okay so how would you rate open plan then on that scale?

B: I would say that it is an improvement, but not significant improvement

A: Okay lets talk about your role clarity now, if you were to look at role clarity how does the clarity of your role compare to prior to the re-structure, were you 100% clear about your role now and in the past or is there a difference?

B: Being a scheduler all along I was quite clear in what I was expected to do in the old structure as well, Mmm, apart from that in the new structure it is more stipulated, better clarity as of what is expected of us. **RC**

- A: Okay then how would you rate it based on what you just said?
- B: Also an improvement
- A: What are your thoughts regarding the quality assurance cycle and compare this to previous QA systems before the re-structure?
- B: (Laugh) Prior to the re-structure there was no QA system. I think all of us really appreciate the new quality assurance system where people get appraised for what they do and definitely a big improvement. **QA**
- A: Okay that leads us into the next question around reward structures, describe how the reward structure affects you and describe how this compares to reward structures prior to the re-structure?
- B: Prior to the re-structure there was basically no reward structure. We were just doing our jobs and expected to do well and never got any praise or reward for it, whereas in the new structure we are getting a reward if you do something good you get rewarded for it and I think that that boosts the morale of everybody in the department and sort of gets you to do even more than what you are supposed to do. **RWD**
- A: Okay, how would you rate that reward structure from before to now?
- B: Significant Improvement
- A: Okay then I have got one more question for you and that is, describe for me how, has there been a change in the department's ability to influence the contractors performance, past versus present?
- B: Definitely the vehicle availability and the PRDF reporting is a much more hands on system where we can monitor each day what has been happening with the contractors. There has also been a big improvement where in the old system there was no actual control over the contractors. **CM**
- A: Okay then just lastly, do you have any comments, mmm, that you would like to include in this survey regarding the re-structure, it can be positive or negative, any comments that you would like to add in terms of your experience through this whole process
- B: Mmm, yes I would say the re-structure procedure that was followed could be more transparent and more, getting people of the department more involved in the re-structure process and that is basically it
- A: Thanks!

INTERVIEW 8 TRANSCRIPT:

- A: INTERVIEWER
- B: INTERVIEWEE
- A: Thanks for agreeing to be interviewed. Your answers will be kept confidential. This is an interview for a thesis and it is to do with the re-structure of the department, the scheduling department.
- A: Okay, the first question that I would like to ask you is describe your current communication channel with customers and how does that compare to the communication before the re-structure? Think back more than two years and just give me an idea if any changes have taken place.
- B: I think definitely, there have definitely been changes. There is now a more hands on approach. First of all the introduction of this new IVR system is very different to the way that it was before. We were in a MASP before, however the MASP was split up between the floor and the communications, the calls used to be screened and then channelled through to delivery control. **CC** As apposed to the way that it is now, where the customer goes through the IVR to DC, so it is a more hands on approach. At the same time customers can come through directly to you with their problems as apposed to being screened. The way that it was formerly was, customers, I wouldn't say used to struggle to get to us but, I am trying to think now it was a while back. I think it is less time consuming now for the customer to come through. With the dial in approach, it is a matter of the customer just putting in his account number and making his selection as to where he exactly wishes to go. Especially with delivery control, we are able to attend to their problems a lot sooner. The approach that we have now is with the problem-solving tree, we have always had the problem-solving tree, but with the customers coming through directly to us, we have a more structured approach as to the way that it was before. There was always an emphasis as to getting back to the customer in a certain period of time, but now especially with the quality assurance that's, quality assurance person as part of our team I think there is a lot more structure that goes along with it and a lot more quality that comes out of the nature of the work as well.
- A: If you had to rate the change in communication with the customer on this scale where would you rate it in terms of the old style of doing things versus the way that we do things now?
- B: Well I can tell you straight off it is definitely not anywhere near poorer, it is definitely not even partial, and it is a definite improvement or even a significant improvement.

- A: Okay, lets move on to the next question, Mmm how do you think customers feel about the communication channel and how did this compare to their feelings before the re-structure when they were going onto the service centre floor and then electronic referral into delivery control?
- B: That is correct yes
- A: How do think the customer, has there been a change in his perception do you think of the two methods?
- B: Definitely, as I said previously, customers, there were also times when we were inundated with calls and we would take anything up to two or three hours and on an occasion there would even be slip ups from the PAL co-ordinators on getting to log certain calls and there was no follow up done in delivery control.
- A: Are you saying that there was a broken telephone effect?
- B: There certainly was, but I mean we worked with the logging system as well so aside from just passing calls through to delivery control and first screening it we also had a system where if there were too many calls, they would actually refer the calls, we had a referring system as well. Much the same as we have in delivery control now with the handing over of work at the end of shift. What PAL used to do on occasion where the customer used to fall through the cracks and that, where the calls got screened and there were just too many calls coming and somehow there was a missing link between PAL co-ordinators and delivery control.
- A: So you may not have got the query or problem at all?
- B: That is correct yes, definitely
- A: If you had to rate the customer's feelings towards direct access now on this, where would you say, where would you rate it?
- B: Mmm aside from the present situation with the crisis that we find ourselves in, with the present situation we are inundated with calls so lets just move away from that now.
- A: If we are talking about a normal week?
- B: Oh a normal week, Mmm its really easy access isn't it, customers dial in, punch in their code and come directly through to delivery control, we assess the problem and its so much quicker and in terms of us getting back to the customer as well.
- A: So where would you rate the change?
- B: Mmm, significant improvement, it's a vast improvement
- A: Okay let's talk about the communication between DC's, schedulers and pre-planners, do you think the communication has changed since before the re-structure?
- B: Mmm, lets see, pre-planners and schedulers, I ya, working, I mean specifically in my case, I really only see two pre-planners and that is looking at the Killarney cluster and Island View clusters. Especially considering where we are seated, the real seating structure has changed significantly as well. Formerly we sat where pre-planners sat together and the schedulers sat together, I think that there is a closer nit, a closer interaction between obviously the pre-planners sitting almost alongside the scheduler as apposed to the way that it was before, so there is now direct communication. **IC CT**
- A: How was it before?
- B: Mmm, before customers used to, I must be honest with you I can't remember how it was before, I don't think it was that much of a problem between schedulers and pre-planners, I didn't really get involved, but I mean the pre-planners were completely separated from the schedulers
- A: In terms of communication between the three roles, can you rate it on this scale?
- B: Mmm I must say that the pre-planners have improved significantly, I interact more now with the pre-planners, they come to us directly should there be problems as apposed to straight to the scheduler, so with the schedule being complete there is more of an interaction now as well between pre-planners and delivery controllers as apposed to the way that it was before, there wasn't much of that. **IC**
- A: Okay
- B: With e-mail as well there is a lot more emphasis, should there be any problems with pre-planning, we get into contact with pre-planners via e-mail or we approach the pre-planner directly as apposed to the way that it was before, the pre-planners I feel were really all on their own and should anything happen they would go and speak to the schedulers, should there be any failures whereas now there is more communication between schedulers, pre-planners and delivery controllers. **CT**
- A: Okay so you say it's an improvement?
- B: Definitely!
- A: Describe how you problem solve, how does this compare to problem solving before the re-structure? Let's just talk about problem solving with the electronic referral process versus problem solving now is there any change?
- B: Mmm, electronic referral, when you say electronic referral what do you mean.
- A: Before the re-structure you guys used to receive in notes from the service centre.
- B: From the service centre, ya
- A: In terms of the structure of problem solving has anything changed?

- B: mmm, with calls coming in there was obviously a huge delay especially from the floor. I still think that there is a bit of a gap between the PAL co-ordinators and scheduling...
- A: Okay I think that we are straying off the point here, Lets just talk about your problem solving as a delivery controller
- B: A call comes through directly, mmm, my emphasis is obviously trying to keep the customer wart immediately, sorry I am getting lost with this question.
- A: Okay, lets talk about the problem solving tree, what I am trying to find out is has there been an change to how you problem solved in the past to how you problem solve now?
- B: There is a slight change. I think we as delivery controllers with the main intention of keeping the customer wet, I focus more on getting the customer's full load to him, possibly if there is no place on the schedule I try to get his full load to him on the next available shift, but in the mean time what we are able to do is also place part loads. Its not willy nilly, it is not the customer calling in and saying I want a part load, it is a matter of me placing a part load to try to keep him wet. Now that's the kind of thing that, we didn't really do that before, there was a lot of emphasis on not placing any part loads and but I focus on, whether he is dry or potentially dry and focussing on getting his full template out to him. So essentially there is a slight difference, but me being one of the old stock I still pretty much assess a problem in the same way although with the quality assurance that is very much part of our problem solving we have got this template that we never had before in terms of assessing a customer's problem when a customer calls in it is very structured in that sense, so we get his dips, we get his tank size, so we know exactly. So if there is anybody else who is following up on that problem, it is easy to assess as apposed to the way that it was before, a bunch of notes, a lot of people didn't always put in the distance and that sort of thing so it is very structured in that sense. Really it is just for everybody, so much easier. **PS**
- A: Where would you rate the problem solving changes, if any change at all?
- B: As significant improvement, if only everybody could do it, if we could standardise that, because there are still people who don't do it. **PS**
- A: Okay, how do think the customer perceives the quality of problem resolution now versus before the re-structure?
- B: I am not too sure, I think the quality of work has improved a lot, its not just a case of, it's the way that we treat customers really and people feel like they are being looked after as apposed to "I will call you back in half an hours time" and then two three hours would go by and there was not that quality as apposed to the way that it is now. **PS** So the fact that it is a structure now, it makes the customer feel that this is quality coming through here, there is an interaction with the customer. Some customers ask questions as to why are you asking me that and you need to explain that as well. So as a delivery controller, you are showing the customer that you actually know what you are doing. **PS**
- A: Okay if you were rating the customer's perception of problem solving now versus in the past?
- B: Again, significant improvement
- A: Lets talk about empowerment now, are you empowered to make decisions in your role now and how does this compare to your empowerment two years back?
- B: Mmm, We are empowered to speak to anybody in MSD now, that channel of communication didn't really happen in the past versus what is happening now. It was more through a supervisor from a delivery controller, the way that it was before, whereas now it is hands on for us, speaking to anybody, getting the type of information that you need. **EMP**
- A: Do you feel empowered in your role?
- B: Mmm,
- A: To take decisions
- B: Ya, no, empowerment in terms of decision making, the problem is that I think that I have always felt that way about it as apposed to the communication. I have always felt empowered with decisions that I make, so there I would say a partial improvement for me. **EMP**
- A: Okay, what are your thoughts regarding the current floor layout, how does this compare to how the floor used o be?
- B: Management, if you were called into management, scheduling management, it was very schoolmaster versus student kind of approach, I am going to the office so to speak, you know because they always sat together and if there was a problem they would call you, or whatever. Whereas now there is more of a focus, we can see our management on the floor; there is a better interaction. **OP** Also coming in the morning as apposed to the way that it was before. You would be lucky if you see them. In order to see them you would actually have to step in and say hi to them kind of thing. Whereas now, even just the greeting for example, you get that kind of interaction. So there is far more interaction.
- A: Okay, and how would you rate the floor layout change on that rating scale?
- B: Mmm, significant improvement as well, when you say the floor layout, we are speaking about the way that the calls come through as well?
- A: No we are talking just about the physical floor layout, the desks.

- B: Well even, we are able to see each other. You are able to see the schedulers, you are able to see the pre-planners, management everybody, as apposed to, there were boards up before.
- A: The second question around this is about open plan offices, what are your thoughts about that?
- B: No definitely, being closed up by partitions it slows you down really I think, whether it is communication just around the office or getting peoples attention, whereas with the way that it is now you are in birds eye view of everybody. I think that it is a lot more relaxed than before, it is just being able to see everybody, people passing by as apposed to the way that it was. **OP**
- A: So how would you rate open plan offices on that scale?
- B: An improvement, I would like to say that I would like to have my own office, but (Laugh)
- A: let's talk about your role clarity, how does the clarity of your role compare now to how it used to be in the past?
- B: Well I have been here for a while and I would say that I am very clear on what my position is. **RC**
- A: Okay let me rephrase it, how clearly did the management teams communicate your role to you prior to the re-structure and now?
- B: Definitely I would have to touch on the communication between management the way that it is now versus the way that it was then.
- A: Okay
- B: I would like to talk about accolades here, do you mind,
- A: No go ahead
- B: You congratulate people on accolades and I don't think it used to happen before and identify certain areas of improvement. It was purely between the supervisory role and at that stage it was just John. There is now a QA and you identify more with your roles and you interact accordingly because you know exactly what you need to do and where the problem really stems from and where you take over and how you interact with each other. The communication between management and us is a vast improvement. We see more interaction via e-mail for example, whether it be quality assurance advisor, supervisors and even delivery controllers commending each other on a job well done. **QA**
- A: Okay, so what do you think of the quality assurance cycle and how does this compare to QA cycles in the past?
- B: You have got to realise that on the onset of delivery control there were definitely always going to be improvements but the fact that there is a quality assuor there certainly closes the loop. That is really were the problems fall between the cracks if there isn't anyone closing the loop. The fact that we have someone assessing our contacts for example never used to happen before. The whole management style was completely different. Now your quality assuor is a friendly face as apposed to the past. **QA**
- A: Where would you rate quality assurance on that scale then, before versus now.
- B: Mmm, definite improvement
- A: Describe how the reward structure affects you and how does this compare to reward structures prior to the re-structure?
- B: I don't remember there being a reward structure. The fact that you can now get a R100 from a job well done, I mean me personally I have bought certain things for my flat because of the reward structure, certain items that I needed. **RWD**
- A: Does that count?
- B: For sure, and at the back of your mind, the reward structure identifies the guys who are doing well and certainly you get the recognition especially when people come up to you and ask you how can I solve this, and that is based on the reward structure **RWD**
- A: Where would you rate the reward structure, before versus after on the rating scale?
- B: Significant improvement
- A: Okay, just one more question for you, is there a difference between the scheduling departments influence over the transport contractors before the re-structure as apposed to now?
- B: We definitely take them on more as apposed to the way it was before. Before the contractors used to get away with murder whereas now we have a contracts manager as well that should anything go wrong, we consult with him that would involve a non-conformance on the contractor side. **CM**
- A: Would you say that the reporting has changed at all?
- B: Significantly, I do feel that with the contractors controllers they know not to mess us around, I definitely feel that they give assistance far more freely than what they did before, but the fact that we non-conformance our contractors then we did before has improved the quality of our deliveries **CM**
- A: Okay, so rate our influence over contractor performance?
- B: Significant improvement
- A: Is there anything that you would like to include in this survey, positive or negative?
- B: Ya, mmm, I would like to see an improvement between our FSF and delivery control especially when they phone in, we should not be stomping ground for them as well. A customer for example will be screaming at them for not receiving a delivery should they then decide that

look this is delivery controls fault, they scream at whoever picks up the phone. I also feel the delivery control, our image has improved vastly, but I think that there should be a greater amount of respect from the other departments. The mechanics of delivery control has improved vastly, and the effectiveness of the team but within that you still have rotten apples that are not pulling their weight.

A: Okay thanks

INTERVIEW 9 TRANSCRIPT:

A: INTERVIEWER

B: INTERVIEWEE

A: This interview is for a thesis research project so I am going to ask you some questions about the re-structure, so it will cover a lot of areas of the re-structure. What I will do is ask you the question and then you can discuss it and answer then I am going to ask you to rate, based on your response, the specific area of focus that we are looking at on this scale.

A: Describe the current communication channel with customers, how does this compare with communication with customers prior to the re-structure?

B: Now it is much easier because it goes through delivery control and things don't get hidden away like before. Whatever the customer or we have got to say is all recorded now and the customer also has a better understanding of what we expect from him and what he expects from us because we don't take calls from the customers like before. We used to have endless conversations with the customers and then our work would stand. **CC**

A: So the customer used to phone you (pre-planner) directly?

B: Yes

A: Now, is it going through delivery control?

B: Yes, and its much easier for us and the customer. Now everything, like gets logged so the customer can't come back and say you didn't say so or whatever because everything is recorded. Not like before as he could talk to us directly and just tell us what to do because they were, how can I say spoilt before (Pre-plan customers). We as pre-planners had the last to say.

A: Were customers dictating to you?

B: Yes, they were told by people when and what to make your lives (the customer's) lives easier, but it was making our lives more difficult. The customers were told by higher authorities that they could call us and tell us what to up (product quantities). Today they still do that a bit but we are trying to curb it.

A: Based on that response then how would you rate on this scale the change in communication before the re-structure and now.

B: For me it is a significant improvement

A: Okay, how do you think customers feel about the current communication channel, how does this compare to their feelings previously?

B: My customers don't have a problem because I keep my customers disciplined and I tell them it is not because I don't want to communicate with them it is just that we must have everything logged and have a report or stats on whatever they want from us and what we want from them. So my customers don't have a problem with it.

A: Give me your opinion on what you think customers feel about the communication change in delivery control now? Remember delivery control had the referral process through the service centre and now it is direct, what do you think the customer feels about that?

B: Well it is much easier because before they would phone the customer service centre and then they will have to wait in a queue again for delivery control, but now they speak directly to us, directly to the delivery controller, the delivery controller sorts it out. They come to us, ask us whatever they can do or if we can help them and the end result is much easier and quicker. **CC**

A: SO how would the customer rate.....

B: An Improvement

A: Okay, describe the communication channel now between delivery controllers, scheduler and pre-planners, have things changed since the re-structure?

B: Yes, before we had to go and dig out things, if there was a failure, things like that and still last year they were not communicating with us, but these meetings that we now have every month and with the end of the year function that we have, the communication is much easier. Even that we are going to improve, remember you said that you were going to move the depot person between us, I think that is going to be a big improvement.

A: Okay rate the communication change between the roles?

B: Improvement

A: Your don't actually problem solve, but think back to how delivery controller used to problem solve versus now, has there been a change would you say?

B: It is a great improvement

- A: Why do you say that?
- B: Because now we are all working together and we are working as a team now. We are not working against each other or because we are clustered now and mmm **CT**
- A: Why do you say we are not working against each other did you used to feel that in the past?
- B: Yes, I used to feel that we worked against each other because people were looking for brownie points and things like that. People would do things on their own, go to their supervisor and discuss things and things would get done behind your back without you knowing. **IC**
- A: How do you think customers perceive the change in quality of problem resolution, do you think customers see a change?
- B: Yes with the new pre-plan forecasting tool, for them it is much easier because before the system was manipulated because whatever dips we put in, people will still go behind your back and make changes, "okay its price change, don't give the customer tonight, give him a load tomorrow". It was always bribery.
- A: Okay how would you rate that
- B: It would be significant improvement because now we have the authority to tell the customer, you are on pre-planning, these are the rules and you must follow the rules because you signed up to be on MPP so, we won't over stock you but we won't also run you dry and things like that. No but we were promised this and promised that, we don't do any promises anymore.
- A: That's great, okay, lets talk about empowerment now, do you feel empowered to take decisions now versus in the past?
- B: Yes, definitely because in the past we couldn't make decisions. Everything was decided already. **EMP**
- A: By who?
- B: By our manager **EMP**
- A: Okay and now?
- B: Now the manager gives us the opportunity **EMP**
- A: Okay and how would you rate the empowerment changes?
- B: That is for me a significant improvement because before we didn't have that opportunity **EMP**
- A: What are your thoughts regarding the current floor layout?
- B: Great, a significant idea!
- A: Okay, why do you say that?
- B: Because before, management were all on their own, hidden away. The sheep had to sit out in the field and they had to do their own thing and only when a bomb explodes then you will see management. Then you would see management running in, what happened here, what happened here. Otherwise we weren't even involved. Now management is like, we are like an open team. **OP**
- A: So do you see that as a significant improvement?
- B: Yes
- A: What are your thoughts about open plan offices in general?
- B: Before I wasn't that optimistic, but now
- A: What made you change your idea about it?
- B: Because you can speak to everybody now, everybody is available if you are not there, we have got our supervisors that we can talk to and we don't have to be scared to go and talk to you because at the moment I think that we are working as a team and that we are on the same level. We are not treated now like before, oh you are just a bunch of herds you can just go on. **OP**
- A: So there was a distinct segregation in the past?
- B: Yes
- A: How would you rate the change from a closed plan to an open plan on that scale?
- B: Significant improvement
- A: Let's talk about role clarity now, how would you say, has your role become clearer since the re-structure?
- B: Yes because before I was a pre-planner, but I also didn't have the freedom to show what I can do. Although I was a pre-planner I couldn't just do work as I was supposed to because everything was dictated to you. **RC**
- A: And now?
- B: Now I can prove myself and I say what I am doing and my customers understand pre-planning because we are working as we are supposed to now, as a pre-planner, I do my job as a pre-planner, not as a donkey just doing whatever is jotted down to me. **RC**
- A: Okay, and how would you rate that role clarity?
- B: An improvement
- A: What are your thoughts regarding the quality assurance cycle and compare this to quality assurance cycles to before the re-structure?

- B: I don't even think we had a quality assurance cycle **QA**
- A: What do you think of it?
- B: I think it is a great idea because now we at least know where we can improve because everything is put down to you on black and white where you were right or wrong or where you can improve or you can even discuss it whereas before it wasn't even disclosed to us we didn't even know what to do or where to go because nothing was on black or Wight. I don't know where they got the information from, I don't know how the even calculated it before, but now it is shown to us on a daily basis **QA**
- A: Where would you rate quality assurance on that scale?
- B: It is a fatal improvement **QA**
- A: Describe how the reward structure affects you and how does this compare to reward structures of the past?
- B: It is great, in the past we didn't have a reward structure but now it gives you motivation and every month I think Ooh I am going to be the winner, but then there is somebody else because everybody wants to win. So it is like a push for each and everybody, because everybody wants to be first, so I think then you also improve on your workload. **RWD**
- A: Okay and how would you rate reward structures?
- B: It is a significant improvement
- A: Then lastly, has there been a change in the way that we manage transport contractor non-conformance, performance?
- B: Yes, because at the moment we also understand about contracting and spot hiring and all these sorts of things, before it was like the pre-planners were kept away from that, we didn't even know what went on, like we didn't even know about trucks, we didn't know about BVO's and things like that. **CM**
- A: That is amazing
- B: Now we can also communicate because we also know what is going on
- A: In an open plan office do you hear now what is going on?
- B: Definitely, before we were treated as pre-planners and nothing else. We didn't know what was going on in delivery control, with the schedulers, things like that. At the moment we know everything
- A: Okay that's excellent, okay, how would you rate the....
- B: I think it is a significant improvement
- A: Is there anything that you would like to add regarding the re-structure, positive or negative? I know it has been a long journey for all of us
- B: It was difficult at the beginning because we were so used to sitting in our own little hoekie and nobody even bothered if you are enjoying what you are doing or not. Now we are sitting in the open plan and every day, management will come to you, good morning how are you, are you doing okay and in the afternoon the same, like enjoy your evening. Before you didn't even know if your manager is in or out. I must say I love this whole change and I think we must just go from strength to strength. We can improve on what we are doing now, I am looking forward to even the new changes that you have in mind because you don't do things on your own, if you want to do something you first put it on the board and then hear what other people have to say and then go on with it. Not like some managers they will do a thing without even considering you and then you must just fall into place. Thank you very much for the years that you have been with us and whatever you gave us because it has been a great improvement and when I started in pre-planning I thought shit what a dump I am just going to sit here and rot and no-one is going to even think me for what I am doing.
- A: Yes, we did it as a team, it was great.
- B: Yes
- A: Okay thanks!

INTERVIEW 10 TRANSCRIPT:

- A: INTERVIEWER
- B: INTERVIEWEE
- A: This is for a thesis and the answers that you give today will remain anonymous. What I want to do is just ask you some questions and then once you have responded I am going to ask you to rate that specific topic that we were talking about on this scale.
- A: The first question is, lets have a talk about the channel of communication with customers, do you think that there has been a change in the way that we communicate with customers comparing before the re-structure to now? We are talking communication channels with

customers.

B: Looking from the DC aspect I would say yes, looking at the bigger DC staff compliment. I would assume that there is a quicker response to customer's queries or requests. So yes, I think that there is a significant difference there.

A: So how would you rate the communication change?

B: As an improvement

A: The next question, how do you think customers feel about the current communication channel into delivery control versus how they thought in the past, don't know if you remember how they used to communicate in the past?

B: My opinion is seeing that the customer has direct access to DC as apposed to the old time when they used to phone the customer service centre and then put into a queue. I think customers are happy to have the direct contact with DC. **CC**

A: Okay, and how would you rate the customer's perception on that change?

B: I will have to say that it is a partial improvement.

A: Describe the communication between delivery controllers, schedulers and pre-planners, have things changed since the re-structure?

B: Initially there was a positive change, but my personal feeling is that in the last two or three months that positive change has taken a bit of a slack, I think it is more a lack of motivation.

A: Do think this could be related to the supply crisis that we have been through?

B: It has definitely played a part. I think it is in conjunction with the many price changes that has come and also the change of product at the beginning of the year.

A: Staying with the communication between DCs, schedulers and preplanners, do you think that there has been a change since the former structure of the department, has there been any change in the communication to how it used to be?

B: Okay, I would think that there is a definite change especially as far as scheduling and pre-planning goes, ya, much closer. There is more of an open communication. I think with DC there might still need to be some improvement **IC**

A: Okay, so how would you rate that on the scale?

B: Definitely a partial improvement

A: Let's talk about the delivery controller's problem solving, has there been any change in the way that they problem solve with the customer, past versus now?

B: Mmm, my impression is that there is a group of people in DC who are over eager to satisfy the customer and often at the cost of customers who are ordering as per the service level agreement and they will often disrupt the schedule in order to please the customer. Often it would repeatedly be a dry runner because of his own mismanagement. **PS**

A: Okay, a good point.

A: How would you rate the problem solving?

B: Definitely an improvement

A: How do you think that customers perceive the quality of problem solving now versus in the past?

B: To be quite honest I need to exclude myself from that because not working with customers myself or getting to hear how they feel about it I don't think that I am qualified enough to give you a positive or negative response.

A: Okay just give me your perception of it, what is your gut feel or take on it?

B: My gut feel is that there is definitely a greater degree of satisfaction from the customers, although however there are those certain customers that seem to abuse DC and the system. **PS**

A: Okay how would you rate the customer's perception of the quality of problem resolution?

B: Definitely as an improvement

A: Lets talk about empowerment now, if you think back to the past versus now, have things changed in terms of your level of empowerment, has there been any difference in your empowerment?

B: I don't think that there is much of a change in that regard because, ya, I haven't had the opportunity or maybe I haven't used the opportunity to test that particular point. **EMP**

A: Okay, so you say no change there

B: Yes

A: What are your thoughts regarding the current floor layout, what are your personal thoughts on that?

B: With regards to cluster layout it is a good idea, it works. **CT** The only the problem that I personally have is that the noise level on the floor is in many cases too bad. **OP** That is not actually the word that I am looking for, the noise level is unacceptable. Many days and especially when management isn't around then it seems to increase.

A: So that needs to be watched

B: Yes, absolutely

- A: If we are talking about the cluster teams, where would you rate that to how you were structured before?
- B: Okay, team structure was definitely an improvement
- A: What do you think about open plan offices in general?
- B: Too little privacy **OP**
- A: Why would you want privacy in the workplace?
- B: Okay, there are times when you need to work without disruptions or people just coming to your desk and sitting down and wanting to chat for, wanting to get their point across. There are times, certain times of the day when one needs to be able to shut yourself off and concentrate on the task at hand. **OP**
- A: Okay, rate open plan offices for me in terms of your feedback?
- B: I would say, slightly poorer **OP**
- A: Okay how does the clarity of your role compare now to before the re-structure?
- B: I have always been clear about my role in the past as now. I don't think that there has been any change there. **RC**
- A: Okay, what are your thoughts regarding the QA cycle and compare this to previous QA systems prior to the re-structure?
- B: I think the QA system that you have in place is definitely a tremendous improvement on anything prior to this. I can most definitely say that it is a significant improvement on what we had before. **QA**
- A: Describe how the reward structure affect you and compare this to reward structures prior to the re-structure of the department?
- B: Okay, prior to the restructure of the department, there wasn't any significant reward structure to speak of. The reward structure, I would think also has a mixed bag of feelings amongst the staff. There are certain people who are continuously rewarded obviously because of their diligence and there are those, probably through lack of diligence don't get rewards and feel that they are left out. But yes for those who really want to achieve good results in the workplace it is a good thing **RWD**
- A: Okay, how would you rate reward structure now versus before?
- B: Definitely a significant improvement
- A: Then the second last question, do you think that there has been a change in the way that the scheduling department manages the transport contractor's performance before versus now?
- B: Yes most definitely. Although I said earlier that I haven't tested the empowerment thing, there are time when the schedulers are more involved with how scheduling is managed and how we communicate or liaise with the transport contractors. Yes there has been a definite improvement. We have more better access to the transport contractor's management. Definitely an improvement to the past. **CM**
- A: Okay then just lastly, is there anything that you would like to add regarding the re-structure, either positive or negative?
- B: The only thing that is of concern to me from time to time, not continuously, there is a frequent increase in the noise level. I also feel that there are times when management, and that means the team are hell of a stressed out and we often don't get the needed feedback and support when you guys are as stressed as you are, that is the best I can give.
- A: Okay thanks

INTERVIEW ANALYSIS THEMES 1: INTER-ROLE COMMUNICATION

Scheduler and Pre-planner interaction:

"With them also being so close, the scheduler can advise the pre-planner on how they should be filling the vehicles, loads going in a particular direction."

"I think that there is a closer nit, a closer interaction between obviously the pre-planners sitting almost alongside the scheduler as apposed to the way that it was before, so there is now direct communication."

"I must say that the pre-planners have improved significantly, I interact more now with the pre-planners."

"Okay, I would think that there is a definite change especially as far as scheduling and pre-planning goes, ya, much closer. There is more of an open communication."

Management and the roles:

"The management team are positioned in the middle of the floor. They are visible to everybody, they are available to everybody, there are no closed doors, they don't need to pick up the phone to call them, they can just see them. If they need assistance they can just put their hand up

and call them over. "

"Now its open, and with any problems or queries they can go directly to the manager or to the Supervisors to get any information that they need."

"Compared to now where everyone and everything is at hand, from top management right down to delivery control, the go between everyone is there. The way it is structured is perfect especially with the cluster thing, we have new clusters, its easy communication, the communication has changed so much."

"We don't have partitions separating us from management which is very open to communication."

"Before, we had management on one side having their meetings and their whole operation behind doors and we never knew what actually happened whereas today the management is working as a team with us, solving problems and giving input right through the day, each day."

Delivery Controllers and the roles:

"Where the delivery controllers are sitting, they are now able to ask questions to each other, or just bounce something off the other one."

"We found that in the past there was a gap between the schedulers and delivery control. "Don't speak to me", "go via the depot". You had to speak via your team leader to a schedule whereas now that gap has been closed where we have the depot person who deals directly with only one person whereas now they sit right next to each other, the people are close by and everybody is kept informed of what is going on."

"Yes definitely, Mmm, before the re-structure especially between DC and the schedulers, there was just about no communication or very poor communication, whereas we are sitting in the new cluster now and having a pre-planner with you so that you can communicate right through the day with you and then also the DC. The DC handling phone calls all day long, queries and problems, I am being in a position to overhear those problems and I can give direct input into the problem or query. Whereas previously there was nothing like that."

Comments against inter-role communication:

"I won't say that it has been a great improvement, there has been a partial improvement with that, with the pre-planners and schedulers in the recent past, there has been a significant change there, there's more communication between the two of them with their planning, which vehicles to use, which customers and clustering. From delivery control's side, especially with the depot MASP, because they deal more actively with the pre-planners and the schedulers, that's also been some improvement there, but there are still a few gaps that we need to concentrate on."

"Yes definitely! It has definitely improved, there is still room for improvement, but it is much better."

With regards to that I think that there still needs to be work done."

I think with DC there might still need to be some improvement."

INTERVIEW ANALYSIS THEMES 2: OPEN PLAN

Openness and transparency:

"There are pros and cons but I feel that when you have an open plan you are, everything is visible, there is openness and transparency. You know you don't want to be treated in a certain way where you are screaming at another staff member, you need to be tolerant of every individual."

"Well I like it I think that it is a good change. If there were more offices in the rest of the company that would go that way, it would be a huge difference, because they still have the high screens, where I sit behind and you work there and I work here. "

"The old structure was very poor, it wasn't friendly, it wasn't open, there wasn't that visibility. Now it is right on top of the scale."

"I actually love it. You don't want to work in an international company and only know the person who works next to you in your office So open plan is far better, because it allows for freedom. It allows for room to breath, and you get to see everybody and life itself within the office."

"Compared to now where everyone and everything is at hand, from top management right down to delivery control, the go between everyone is there."

Management interaction:

"They are visible to everybody, they are available to everybody, there are no closed doors, they don't need to pick up the phone to call them, they can just see them"

"There is no manager sitting in his own office with the door closed. Staff are much more open, more friendly There are no masks or hidden agendas here. I like the way that it is setup"

"The old system, the old layout was very boxed in, like them and us Now its open, and with any problems or queries they can go directly to Brian or to the Supervisors to get any information that they need"

"And it's open, we don't have partitions separating us from management which is very open to communication."

"Whereas now there is more of a focus, we can see our management on the floor; there is a better interaction."

"Because you can speak to everybody now, everybody is available if you are not there, we have got our supervisors that we can talk to and we don't have to be scared to go and talk to you because at the moment I think that we are working as a team and that we are on the same level."

Work quality:

"Whereas now everybody knows what is going on, it is open, you speak to whoever you need to."

"No definitely, being closed up by partitions it slows you down really I think, whether it is communication just around the office or getting peoples attention, whereas with the way that it is now you are in birds eye view of everybody. I think that it is a lot more relaxed than before, it is just being able to see everybody, people passing by as apposed to the way that it was."

Teamwork:

"I like it, I like it I think it much nicer because we are all pretty much on the same level as far as the way that we sit and work."

"Whereas today the management is working as a team with us, solving problems and giving input right through the day, each day."

Noise level:

"A: Does the open plan noise not effect performance at all? B: No, I think it actually enhances it because of the way that the floor plan is set up."

"The only problem that I personally have is that the noise level on the floor is in many cases too bad."

"Too little privacy, there are times when you need to work without disruptions"

"There are certain times of the day when one needs to be able to shut yourself off and concentrate."

"I would say that the open plan has its benefits and its negatives. The benefits being that we are working as a team and you work together with the rest of your team with management involvement all along, that's quite good, but the negative side of it is the noise level and sometimes there is a bit of lack of concentration because of the noise and the whole commotion going on."

INTERVIEW ANALYSIS THEMES 3: STRUCTURE CHANGE – CLUSTER TEAM

Problem resolution:

"Definitely with the way we are structured now with the pre-planner, delivery controller and scheduler in the same cluster, and sitting in such close proximity, as soon as there is a problem, they can get up and sort it out with the scheduler or the manual-pre-planner to assist them to get a quicker solution to the customer. So it's definitely you know, the time delay compared with what we initially used to have, is almost eliminated now."

"They can immediately see the clusters, who would be dealing with a killarney problem or an alberton problem or mossel bay problem, they can immediately go to that area and say who is the pre-planner here, who is the scheduler here, who do I need to discuss that with."

"They sit in a cluster now for example the Alberton scheduler will sit with your Alberton pre-planner as well as your Alberton DC cluster, so there is no longer traffic up and down, the people are close by and everybody is kept informed of what is going on."

"I think that there is more interaction, for example I mentioned earlier that the relevant cluters are sitting with each other, they are not scattered all over the show."

"The schedulers were, I felt they were unapproachable because they were marked as you know, you cannot approach them you had to go via your manager or team leader, Grant at the time. But now we can."

"It all interlinks now with one another and we know what their job description is and they know what we do so it obviously opens up a whole new line of communication which is obviously to our advantage."

"The way it is structured is perfect especially with the cluster thing, we have new clusters, its easy communication, the communication has changed so much."

"Whereas we are sitting in the new cluster now and having a pre-planner with you so that you can communicate right through the day with you and then also the DC."

"definitely there is a much bigger bond between the scheduler and the pre-planner working closely together."

"whereas now there is more communication between schedulers, pre-planners and delivery controllers."

"We are not working against each other or because we are clustered now."

"With regards to cluster layout it is a good idea, it works."

Expertise:

"I think it is much better, because there is much more concentrating on a specific area, before it was like a maze. Now you have a structure with which to deal with. An area where you gain expertise, and you focus on that area."

"So concentrating on a certain cluster, you get expertise on that specific cluster, you get how can I say, you become more valued."

INTERVIEW ANALYSIS 4: COMMUNICATION WITH CUSTOMERS

Direct Access and live resolution:

"The improvement that we have now is that customers can speak directly to the problem solver"

"How it has improved now is as soon as a problem is identified it can be sorted straight away and you can intervene with the depot immediately"

when the problem arises and you can solve the problem today and not only tomorrow or the next day because of times, you know our cut-off times”

“They are very happy, they want someone to listen to them and actually understand the problems that they have. It is very difficult for the customer to explain to someone who is taking their orders, the situation that they are sitting in. They actually want to speak to someone who actually knows about vehicles, knows about tank sizes, knows what the impact is on their forecourt if they don't have product. With them speaking now directly with delivery controllers it has improved it dramatically because that actually get to speak to the individual and that person is helping them to sort the problem out”

“There I will put it down as a significant improvement because there is now more feedback to customers”

“Previously there wasn't that great communication, we would just say: we will advice you later during the day, which would mean that the customer would be phoning back.”

“The way that I see it is that they are feeling much more confident and more trustworthy because they believe in what we tell them because there is a communication of getting back to him and advising him of whether it is good or bade news, negative or positive, he is being kept in the loop of what is happening.”

“Before it was never a direct communication with customers.”

“There was always, like a three way communication. Communication now is a direct way of communicating which is much better because the customer gets a prompt response. He gets an answer from the person who is responsible for his answer. Before he could speak to anybody and three or four people would be responsible for his problem.”

“Before, I didn't have to take responsibility for the customer.”

“So the communication structure is better.”

“I think that the customer feels that he is more valued. “

“But now since the change a year or so ago, you can see there is a change in the way that customers speak to you. They appreciate the way that things are going instead of the way that things were.”

“They would come through directly to the service provider so that communication channel that has changed where they don't have to wait an hour before they get feedback, they will get feedback immediately.”

“They are very happy with it because we speak directly with the depot, we have the schedule at hand, were like I said, before they would have to wait. A call back would have had to be done, whereas now they get an immediate answer, live resolution.”

“In terms of that I think it is a significant improvement, because at least now we get a basic idea of the customers needs, they can explain exactly to us the situation that they are in and for us to be able to a much better job, in a more efficient way.”

“I think we bought over the customers from whence they came, us not being able to speak to them and they used to get frustrated not being able to voice their opinion or their needs.”

“That was before the re-structure, and I mean now one still gets those customers who are not happy but I would say 90% of them are very happy with the communication that we do with them. Because we are in charge of the schedules and in contact with the depots so we have a better idea than I think anyone else so that we can feed them you know with the proper information that they require and that is all that you actually need at the end of the day.”

“Okay, I like the fact that the customers can't get through like they used too, it makes our lives much easier even though some of them still try their luck and try other routes. It is much easier than the phone ringing all the time like it used too, so definitely an improvement.”

“I think that it has gone down because they can't get through.

“Much better now, Mmm, in two ways that I can think of: The SMSing that has been implemented and then also the phone out system that has been upgraded and the record keeping of documentation. So I would say that the whole of the communication was improved by 80 to 90%.”

“Yes, it wasn't controlled at all, customers phoned in as they wished and with queries, whereas at the moment we are having the IVR system and where they get a lot of answers on line so they don't have to phone in to speak to delivery control or scheduling.”

Wait Field Concerns:

My impression is that they are very frustrated, especially at peak times, price change, during crisis, they are very frustrated, I don't know why they struggle so hard to get through but they resort to other measures.”

“I think that delivery control is great, but I think that the frustration level of the customer to get through is a big factor.”

“I would say that customers in a way are satisfied with being able to speak to the right people for their query, but then also I would have to say that sometimes the lines are a bit clogged up and they can't get through, so there is a bit of unhappiness there.”

INTERVIEW ANALYSIS 5: PROBLEM SOLVING

Standardisation and Structure:

"The main problem that they had in the past was that there wasn't a set problem-solving tree and what suits one individual might not suit the other."

"The problem solving tree that you introduced to the department for example the customers distance the size of the vehicle that can access the site, if we can't assist him when can we assist him. You know all the basic guidelines that you gave us, I feel that that has helped us more now than in the past because there wasn't a guideline, there wasn't a set procedure for problem solving as there is now."

"I would say that's a significant improvement, because they can go back to that delivery controller and say hang on did you do this for me or that."

"Mm, I don't see any difference now as to before as far as their problem solving, I think it's, I think it depends really on who you speak to and I think it was the same before, if you get someone who is jacked up, you know who really wants to try and make an effort, they will make a difference."

"Okay in the past, one thing that has come out of the new millennium or the new method of doing things was the set procedure as to do things. In the past each person in delivery control sort of did the best he thought practical for the moment, whereas now you have a set procedure and a decision tree to follow so each problem will be handled in the same way in the correct method, which is much better."

"So if there is anybody else who is following up on that problem, it is easy to assess as apposed to the way that it was before, a bunch of notes, a lot of people didn't always put in the distance and that sort of thing so it is very structured in that sense. Really it is just for everybody, so much easier."

"As significant improvement, if only everybody could do it, if we could standardise that, because there are still people who don't do it.

So the fact that it is a structure now, it makes the customer feel that this is quality coming through here, there is an interaction with the customer. Some customers ask questions as to why are you asking me that and you need to explain that as well. So as a delivery controller, you are showing the customer that you actually know what you are doing."

"My impression is that there is a group of people in DC who are over eager to satisfy the customer and often at the cost of customers who are ordering as per the service level agreement and they will often disrupt the schedule in order to please the customer. Often it would repeatedly be a dry runner because of his own mismanagement."

Cost reduction:

"They never had any, you know, they will just like trouble shoot, I will solve this problem even though it is the most expensive way to solve the problem"

Quality:

"We used to tell the customer either he waits until tomorrow, or we just can't help you."

"So the improvement is definitely that they have a structure now and they know what is required of them."

"The customer is extremely happy and their expectation now is that someone has to do all these things before they can get any, so there is someone who is working on their problems and all the solutions that they used to come up with, they actually see it on the problem solving tree and they can understand why the delivery controller needs this information from them."

"There's more understanding from the customer's side and obviously if there is more understanding the customers will be happy.

Significant improvement. The reason why I am saying that, is that customers used to always be left in the dark, this is what we can do for you if you are not happy with that, you know you will have to wait for the next shift."

"Prior, I can't say much because I wasn't involved in delivery control but from experience the calls would go through delivery control and I don't think that there was a set procedure to try this option then that option. They would just look at the schedule, is there space or not. I don't think that there was much process."

"There is an improvement in that we are keeping him informed keeping him abreast of changes"

"Oh, it can't be compared, there has been a remarkable change. There has been a very big change and I am sure that the customer knows that if he contacts delivery control he is going to get an answer or he will be assisted."

"I would say that it is an improvement, there is still lots of room for improvement."

"I think that they are much more, I mean, before we never got the accolades that we are getting now, basically customers are not calling back to get feedback we are calling them. You can see the change in the customer as well, he is appreciating the service. It might not always be what he wants, but we are getting back to him as promised."

"They are aware of this problem-solving tree because some of them will say but did you find out if there is a vehicle because that's the feedback they are giving. So they trust us, the trust the problem-solving tree."

"Okay, before the re-structure we actually had no control over the problem solving. It was just about taking our orders to the scheduler and him having to sort out the problem. Perhaps not even sorting out the problem, if there was space on the schedule. Now its open, we use the problem solving tree which is something really great that has happened to the department because we have got the tools, I mean that is the right tool for us to be able to do our job properly. And it is all in our hands; we have been given so much to work with so it's really a great improvement."

"Before, we weren't involved in the problem solving and customers weren't aware of the length, or rather there was no structure set up so they

couldn't really rate us and tell us compared to now with the accolades where customers phone in to thank us and obviously that recognition in knowing that we go the extra mile, or not even going the extra mile, its part of our jobs knowing that the customer is appreciating what we do for them. This is a drastic change compared to the past."

"My gut feel is that there is definitely a greater degree of satisfaction from the customers, although however there are those certain customers that seem to abuse DC and the system."

Timing:

"Like I said it is an improvement but there is still lots of room for improvement, we are changing with regards to improving our service and the customer calls back to say that he appreciates that."

"Delivery control was given an hour to get back to the customer so we would then go and check on the referral system and for each cluster for example Alberton cluster would look at the Alberton referrals and that is how it was handled. So there already we are losing time for about an hour whereas the customer could have been given feedback immediately."

"There was no perception or very poor perception because they always thought that they were put off, will get back to you and we never got back to him whereas now the moment the customer phones in with a problem, the problem gets handled on the spot and he gets an answer either positive or negative, but he gets an answer on his problem immediately."

"I am not too sure, I think the quality of work has improved a lot, its not just a case of, it's the way that we treat customers really and people feel like they are being looked after as apposed to "I will call you back in half an hours time" and then two three hours would go by and there was not that quality as apposed to the way that it is now."

INTERVIEW ANALYSIS 6: ROLE CLARITY

Role Clarity and Quality Assurance:

"I don't think that there was much clarity as to exactly what was expected of them or a set target of, this is what we are going to measure you on. It was never broken down and explained what needs to be done. Now there is a clear definition of exactly what is expected of them, how to achieve it and to be consistent with that. That has been a big change because now you can actually see what it is you actually have to do."

"Well, in terms of clarity, before things changed all the time."

"Yes, I would go to our manager and they could never give me on paper what our job description was. Whereas what happened with the new restructuring, we were told this is what you are going to be doing, that was pointed out to us, whereas before I was never told this is what is expected of you. Now we are told this is the quality expected of you, this is what you need to do, and you are going to be rated on it."

Role Changes:

"Before they had a vague idea, DC's for example were just assisting customers with queries. Now there is a definite role."

"Were you clear about your role in the previous structure? No, my role was just to come in and take calls and solve problems."

"Yes, now I have been given an opportunity to improve on my role. Before I never had that opportunity."

"I think there is a significant improvement; It's not a matter of me coming in and solving a problem. There is now a delight factor."

Role Direction:

"Yes definitely, its more structured and also with the procedures that are in place, it makes it easier for us to do our jobs. Before there was nothing like that set up, there were no real KPI's either, so you know you were just doing your thing, basically handing in a request and that was it."

"The description of the job wasn't really defined like it is now. Now we obviously have everything, its right there. All the functions that you need to do are much more clear than what it used to be."

"No definitely, it is definitely much clearer now, all the way across the board."

"You know there was just the management team and the delivery control, there wasn't actually who does what."

"There is more clarity now; people know what is expected of them."

"I would say that there is an improvement but it could be improved more."

Timing and Role Clarity:

"Being a scheduler all along I was quite clear in what I was expected to do in the old structure as well, Mmm, apart from that in the new structure it is more stipulated, better clarity as of what is expected of us."

"Well I have been here for a while and I would say that I am very clear on what my position is."

"I have always been clear about my role in the past as now. I don't think that there has been any change there."

Empowerment:

"Yes because before I was a pre-planner, but I also didn't have the freedom to show what I can do. Although I was a pre-planner I couldn't just do work as I was supposed to because everything was dictated to you. "

"Now I can prove myself and I say what I am doing and my customers understand pre-planning because we are working as we are supposed to now, as a pre-planner, I do my job as a pre-planner, not as a donkey just doing whatever is jotted down to me."

INTERVIEW ANALYSIS 7: EMPOWERMENT

Rules and procedures govern level of empowerment:

"Yes they are. They have got clear rules that they need to follow and we have given them power to, you know, follow through and if they are stuck in any way, they can just phone for assistance."

"Yes, most definitely with regards to deliveries, taking customers off to accommodate another customer, or bump for a customer who is running dry and that is part of the decision tree. They have the power to make changes unless there is going to be a huge cost involved they would get the supervisors or yourself to come and step in and say okay lets authorise this to get the load out, but the staff have the power to make decisions."

"Hmm, partial improvement, I mean definitely still, you know, more room for improvement with regards to that."

"Yes we are because at the end of the day it depends on the delivery controller to make the decision. There are certain guidelines that we also have to follow, but before I would say that we weren't."

"I would say significant, can I just mention that before the schedule had to be prioritised by the region, for any price change whereas now because we follow procedure, the prioritisation procedure, they cannot just come and change the schedule based on a buddy buddy system, and to me that is what was happening before."

Autocratic versus Participative:

"Basically, they would always need authorisation to make a decision if it was to remove a customer or see if you can send a smaller load. You could never just take a decision on your own and management would back you on that, it was always: why didn't you ask for authorisation, why didn't you do this, you shouldn't have done that. There was never a clear rule on what they were allowed to do."

"I don't think, I wasn't in the department at the time but from what I saw and gathered then, any changes that had to be done to the schedule, had to first go via a supervisor or their manager before they could make any drastic changes to the schedule."

"Yap, because the fact of the matter is when there is a problem, ok, hmm, you are more empowered to solve that problem, instead of running to a manager and getting his opinion with regards to that."

"Everything that we wanted to do we had to first go via management. And that is every decision!"

"I would say that the schedulers had it before, delivery controllers were just there, the go between, they didn't have any power at all they just basically, the schedule ran smoothly it wasn't as involved as it is now."

"Prior to the re-structure, I was empowered in a way, or I was told I was empowered, but I could hardly even make a decision without being challenged in what I did and how I did it and, whereas now I have the power to make a decision and I am normally backed by my decisions."

"Mmm, We are empowered to speak to anybody in MSD now, that channel of communication didn't really happen in the past versus what is happening now. It was more through a supervisor from a delivery controller, the way that it was before, whereas now it is hands on for us, speaking to anybody, getting the type of information that you need."

"Yes, definitely because in the past we couldn't make decisions. Our manager decided everything already. Now the manager gives us the opportunity"

Self worth:

"I would say that it is an improvement. If you didn't have something in place before and now you have, it also just boosts the staff because they know that they don't have to first go there, does my job really have worth, so there has been a good improvement there."

"I think there has been a change with regards to that, before it was a matter of coming in and not being valued and that was it. At the moment we are given more opportunities than what we had before."

"It also empowers you as a person and gives more meaning to your job description or what you do."

Accountability:

"We are totally empowered to make decisions and you feel completely in charge and accountable for everything that you arrange with regards to customers. Before we never had that at all."

"Yes, definitely a significant improvement. I feel like I am allowed to do my job and run with it, where I need to and if I get stuck I can always turn to management. I would say it's a big improvement."

"I don't think that there is much of a change in that regard because, ya, I haven't had the opportunity or maybe I haven't used the opportunity to test that particular point."

INTERVIEW ANALYSIS 8: QUALITY ASSURANCE

Cost:

"Prior to the re-structure a person did a good job because the customer got a delivery, didn't matter how much it cost."

"Prior, if management felt he went out of his way even though it cost how much to get the delivery to that customer, even though he didn't check all the other options, if he was in favour with that manager he would just be recognised and told: You did a good job."

Opportunity:

"I actually want this QA role to roll out to the rest of the business so that they can see just how important this role is."

"I think quality assurance is very important in any business structure; I think our department in the MSD who has quality assurance. If you don't have someone measuring quality assurance you are down in the dumps because we never had anyone do that before."

Service:

"No, like I said there was no focus on quality. Now with regards to having the customer in mind, there is that quality that comes into play and that's where that service excellence comes in. You can see the change in the customer as well because we focus on quality, and the service we provide must be quality."

Personal Improvement and direction:

"Like I say you are coming to the department, you are coming here to work and you are coming here just to do a job and you don't know whether you are doing something right or wrong, its going to turn into a habit, it might even be a habit that is not good for the department and having that person telling you or the quality assurance advisor telling you, his is what you are doing wrong, or this is what you are doing right and you can improve on that and i will assist you. So there was nothing like that before."

"The only way you can improve is to get more quality assurance."

"I think that we have an excellent tool that we are working with, with QA with the sheets that we are filling in checking our contacts and that sort of thing, compared to before where there was absolutely nothing like that set up. There was no monitoring of contacts. You basically didn't know what was happening with regards to employees with their performance. It is a good thing to have that because you only want to improve for yourself so at the end of the day it is an advantage to the whole department in the role that you play here."

"I think it is a great idea because now we at least know where we can improve because everything is put down to you on black and white where you were right or wrong or where you can improve or you can even discuss it whereas before it wasn't even disclosed to us we didn't even know what to do or where to go because nothing was on black or Wight. I don't know where they got the information from, I don't know how the even calculated it before, but now it is shown to us on a daily basis."

"Well, the quality assurance cycle now is, its like we never had it before, there were never set rules, if you don't do this is going to happen."

Management Style change:

"The communication between management and us is a vast improvement. We see more interaction via e-mail for example, whether it be quality assurance advisor, supervisors and even delivery controllers commending each other on a job well done."

"You have got to realise that on the onset of delivery control there were definitely always going to be improvements but the fact that there is a quality assuor there certainly closes the loop. That is really were the problems fall between the cracks if there isn't anyone closing the loop. The fact that we have someone assessing our contacts for example never used to happen before. The whole management style was completely different. Now your quality assuor is a friendly face as apposed to the past. "

Other responses:

"There was no way of actually checking if that individual followed all the rules, where he rated either, this person did a good job because he followed all these steps. "

"No, definitely an improvement, from nothing to so much now."

"There wasn't quality measuring prior to this. So there wasn't anything to really compare."

"The only way you can improve is to get more quality assurance."

"There was no quality assurance, there wasn't anything like that before."

"Very significant improvement, but there is a lot more that we can still work on."

"There wasn't one when I started and Terry took it and ran with it and now Tammy has just picked up where she left off. What I think is so good about it is the clarity, we all know where we stand with it and I think it has also been implemented. Everything that was set out has been

implemented which is great, I would say definitely a significant improvement.”

“(Laugh) Prior to the re-structure there was no QA system. I think all of us really appreciate the new quality assurance system where people get appraised for what they do and definitely a big improvement.”

“It is a fatal improvement.”

“I think the QA system that you have in place is definitely a tremendous improvement on anything prior to this. I can most definitely say that it is a significant improvement on what we had before.”

INTERVIEW ANALYSIS 9: REWARD STRUCTURE & ACCOLADES

Competitiveness and Accountability:

“The staff have become more competitive, they have become more accountable, they talk to each other, they communicate more with each other and they are actually quit eager to find out how one individual got the upper hand on the other. It's encouraging them to deliver better quality and customer service to customers because of that.”

“Okay, prior there was no reward structure, I don't think there was anything that you could be rewarded for in the first place. But now its just that you are doing your job and you are going the extra mile and you are being compensated for your effort and I think its really great and it keeps the competition up between the employees. “

“So it is like a push for each and everybody, because everybody wants to be first, so I thin then you also improve on your workload.”

“The reward structure, I would think also has a mixed bag of feelings amongst the staff. There are certain people who are continuously rewarded obviously because of their diligence and there are those, probably through lack of diligence don't get rewards an d feel that they are left out. But yes for those who really want to achieve good results in the workplace it is a good thing.”

Support for Quality Assurance:

“How it affects me, I get quit excited when I am doing the QA putting in their KPIs each week, I get quite excited when I see those that have been lagging behind, once they get their feedback, oh this is where I need to improve and then they come up into the top three.”

Motivator through exposure:

“So that's good to see and it also boosts the individual because they are also being recognised and the reward structure really puts everything up there and it makes the others think, hey she or he came in the top three I can also do it. So I think it is a great motivator”

“Previously it was non-existent so it was poor non-existent there. There has been a huge improvement now, I mean it's like it is there now, it is active, used and everyone is happy with it. So something that was non-existent to something that is being used, staff are happy with it and they are working towards that. It is a huge improvement.”

“You want to strive and you want to get to the top, but you also want to be rewarded at the end of the day. And for you to do that you obviously have to put more effort into what you do.”

“I think it is excellent, really excellent, we are motivated and we know that there is, even though we work for our money, there is something extra to work towards, I think it is very good for motivation.”

“Prior to the re-structure there was basically no reward structure. We were just doing our jobs and expected to do well and never got any praise or reward for it, whereas in the new structure we are getting a reward if you do something good you get rewarded for it and I think that that boosts the morale of everybody in the department and sort of gets you to do even more than what you are supposed to do.”

“For sure, and at the back of your mind, the reward structure identifies the guys who are doing well and certainly you get the recognition especially when people come up to you and ask you how can I solve this, and that is based on the reward structure.”

“It is great, in the past we didn't have a reward structure but now it gives you motivation and every month I think Ooh I am going to be the winner, but then there is somebody else because everybody wants to win.”

One Standard for all:

“It was not an issue until I found out that the previous manager used to just take out the Schedulers for lunches, he does not worry about us on the floor. So whenever there was something to be said or celebrated, he would take the schedulers out and not delivery control.”

“Prior to the re-structure there was no reward structure. What they used to do is take us out for dinner. That was it, with your partner. There was no reward structure.”

Self Worth and Belonging:

“I think it's great, and if you work hard then you get recognition for it. I know because I won top performer last year and I mean I sat here for three years in a row thinking to myself how do I know if I am doing a good job without the customers telling me that, and it didn't even get noted that the customers are telling me this. Whereas now an e-mail gets sent when a customer calls in to say Tanya did a good job and we get

recognised for what we are doing and I think that is very important.”

INTERVIEW ANALYSIS 1 1: CONTRACTOR MANAGEMENT

Contractor Conformance:

“With the new structure, we have moved past identifying the problems, we are now actually working on solutions to these problems. Prior to the re-structuring every body knew that they had problems with contractors but no one was prepared to do anything. There was no way to monitor what they were doing wrong, there was no way to identify which one was doing wrong. It was just isolated, oh this depot is giving us problems. There was nothing documented, there was no one being made accountable. Now we have moved forward to say okay these are the problem areas, these are the contractors that are giving us problems and we need to do something about it.”

“There is definitely an improvement because before, we didn't even have contact with the contractors. Now it has opened up and now we at least know what is going on, we can keep tabs on what is happening and before we never had that, because we are now in contact with the depot and sometimes with the drivers so it obviously opens up a whole lot more. I am sure things will improve even more in the future.”

Awareness and accountability through reporting:

“Well, with the traffic light report that we run every morning, we identify the vehicles that are being made available, but are not actually available to do those deliveries. We have identified if there is no product at the depot and we have made people accountable to say okay if you say this vehicle is available why is it not and we have people who we can talk to, to say this is what is going to happen now as a result of the vehicle not being available. Senior management is also aware now that we are having problems in those depots because of the contractor performance.”

“There has definitely been an improvement we are seeing now the change over from one contractor to the next because of bad performance and we feel that we played a big part in that because we delivered on stats that they weren't delivering from their side.”

“Definitely the vehicle availability and the PRDF reporting is a much more hands on system where we can monitor each day what has been happening with the contractors. There has also been a big improvement where in the old system there was no actual control over the contractors.”

“We definitely take them on more as apposed to the way it was before. Before the contractors used to get away with murder whereas now we have a contracts manager as well that should anything go wrong, we consult with him that would involve a non-conformance on the contractor side.”

Empowerment:

“Well prior to this improvement, if we had a problem with the contractor, the problem would be e-mailed to a supervisor and no one would hear about it again, it was just left.”

“Yes it has, I am going to give you an example, price change. Norm: drivers take off sick, before we could never phone the contractor management, we would inform management and then they would phone.”

“Not that we weren't allowed to, we didn't know that we could, so the intervention came, you had to, remember you asked me earlier could you make the final decision, well it never happened. Hello you cannot do that, certain people could do it, others couldn't.”

“Yes, because at the moment we also understand about contracting and spot hiring and all these sorts of things, before it was like the pre-planners were kept away from that, we didn't even know what went on, like we didn't even know about trucks, we didn't know about BVO's and things like that.”

“Yes most definitely. Although I said earlier that I haven't tested the empowerment thing, there are time when the schedulers are more involved with how scheduling is managed and how we communicate or liaise with the transport contractors. Yes there has been a definite improvement. We have more better access to the transport contractor's management. Definitely an improvement to the past.”

Working Together:

“The relationship now with the contractors is that they know where we are, they know what our requirements are if we want to deliver to our customer they are on the same page.”

“There is no dictation, where I am only going to be doing two customers for example. That is the buy in that we have at the moment.”

“It's been an improvement, but I would say a partial improvement because there is still lots of room for improvement, with regards to the contractors get in their mindset. Because I mean all these years, they have just seen a retail site, and dealing with problems with a retail site. They have never seen a customer, so at the moment we have changed from viewing a retailer to a customer, so have they changed their mind set?”

Renewed customer focus:

“What is the contractor's goal, if we want to be the customer's first choice? Are they helping us to be the customer's fist choice? What are we

doing about that? So before there was never a focus towards that.”

“Significantly, I do feel that with the contractors controllers they know not to mess us around, I definitely feel that they give assistance far more freely than what they did before, but the fact that we non-conformance our contractors then we did before has improved the quality of our deliveries.”

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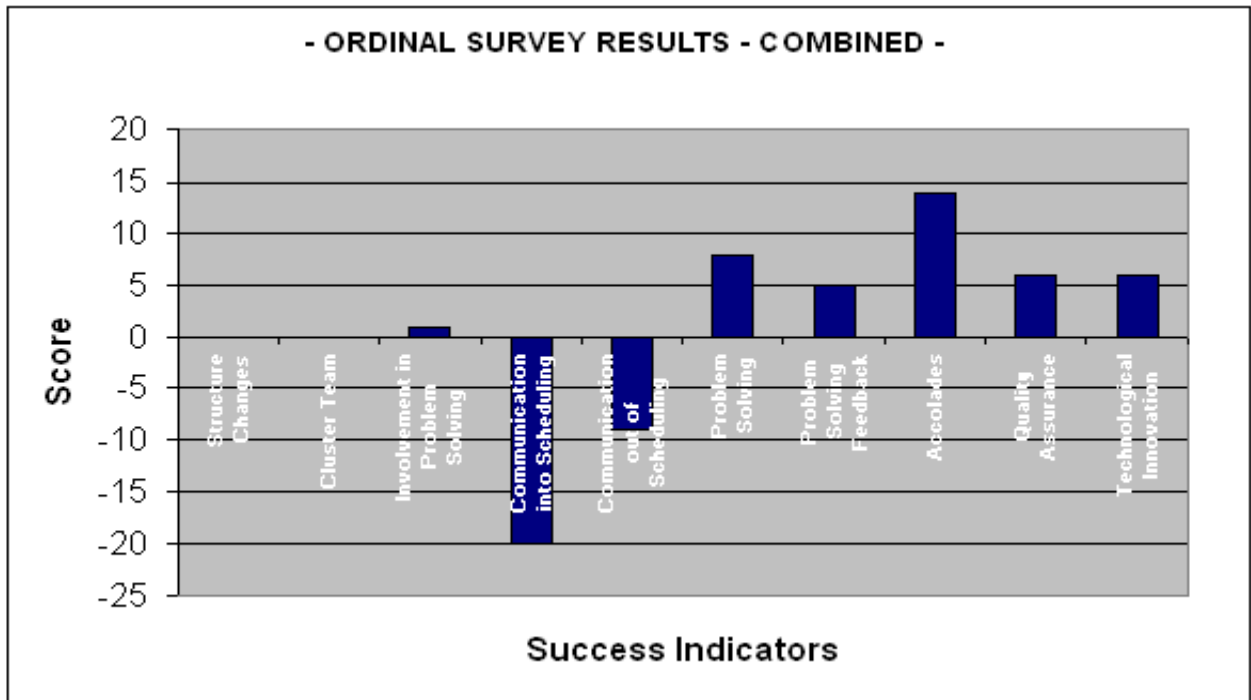
APPENDIX D – SURVEY RESULTS

| ORDINAL SURVEY SCORES TABLE | | | | | | | | | | | | | | | | | | | | | | | | |
|---------------------------------|--|---------------|----|----|----|----|----|----|----|-----|-----|-----|-----|-----|--------|----|----|----|----|----|----|----|-----|-------|
| SUCCESS INDICATOR | SURVEY STATEMENTS | SURVEY SCORES | | | | | | | | | | | | | | | | | | | | | | |
| | | S1 | S2 | S3 | S4 | S5 | S6 | S7 | S8 | S9 | S10 | S11 | S12 | S13 | Retail | S1 | S2 | S3 | S4 | S5 | S6 | S7 | Com | Total |
| Structure Changes | There has been a noticeable improvement in scheduling's ability to service our customers, since the re-structure two years ago | 2 | -1 | -1 | 0 | 0 | -1 | 0 | 1 | -2 | 1 | 0 | 1 | 1 | 1 | 0 | 1 | -1 | -1 | -1 | 1 | 0 | -1 | 0 |
| Cluster Team | DC, Pre-planner and Scheduler cluster teams improves scheduling's ability to service our customers effectively | 0 | 0 | 0 | 0 | 0 | -1 | 1 | -2 | 1 | 0 | 1 | 1 | 1 | 1 | 1 | -1 | -1 | -1 | -1 | 1 | -1 | 0 | |
| Involvement in Problem Solving | I get less calls to my cellphone since direct access to DC was implemented | 2 | 0 | 2 | -2 | -2 | -1 | -2 | 1 | -1 | 1 | -1 | 1 | 2 | 0 | 1 | 1 | -2 | 2 | -1 | -1 | 1 | 1 | 1 |
| Communication into Scheduling | I seldom wait in the wait field when I call in | 1 | 0 | 0 | -1 | -1 | 0 | -1 | -2 | -2 | -2 | -2 | -1 | -13 | -2 | 1 | -2 | -2 | 2 | -2 | -2 | -7 | -20 | |
| Communication out of Scheduling | Scheduling has improved in their communication to customers on delivery failures, order cuts, etc. | 2 | -1 | -1 | -2 | -1 | 1 | -2 | -2 | -2 | -1 | -1 | 1 | -10 | -2 | 2 | -1 | 1 | 2 | 1 | -2 | 1 | -9 | |
| Problem Solving | Delivery Controllers problem solve effectively | 1 | 0 | 0 | 0 | 2 | 1 | 0 | 1 | -1 | 1 | 1 | 0 | 1 | 7 | -1 | 2 | -1 | 2 | 0 | 0 | -1 | 1 | 8 |
| Problem Solving Feedback | Delivery Controllers update me with regular feedback | 1 | 1 | 0 | 0 | 2 | 1 | 1 | 1 | -1 | 1 | 0 | -1 | 0 | 6 | -1 | 1 | -1 | 0 | 2 | -1 | -1 | 5 | |
| Accolades | Delivery controllers make a big effort that should be recognised | 1 | 1 | 0 | 0 | 2 | 1 | 0 | 2 | 0 | 2 | 1 | 0 | 2 | 12 | 0 | 1 | 0 | 0 | 0 | 1 | 0 | 2 | 14 |
| Quality Assurance | Since quality assurance was implemented in the department, the work quality of schedulers, DC's and pre-planners has | 1 | 0 | 0 | 0 | 0 | 1 | 1 | -1 | 1 | 0 | 1 | 1 | 5 | 1 | 1 | 0 | -1 | 0 | -1 | 1 | 1 | 6 | |
| Technological Innovation | Scheduling has improved service by harnessing technology well through SMSing, Schedule Update on IVR, CPP, E-schedule, Pre-plan forecasting tool | 1 | 1 | 0 | -1 | -1 | 1 | 1 | 0 | -1 | 0 | 1 | 1 | -1 | 2 | 1 | 1 | 0 | 1 | 0 | 0 | 1 | 4 | 6 |
| TOTALS | | 12 | 1 | 0 | -5 | 0 | 1 | 0 | 4 | -13 | 4 | -1 | 1 | 7 | 11 | -2 | 12 | -9 | 0 | 1 | 0 | -2 | 0 | 11 |

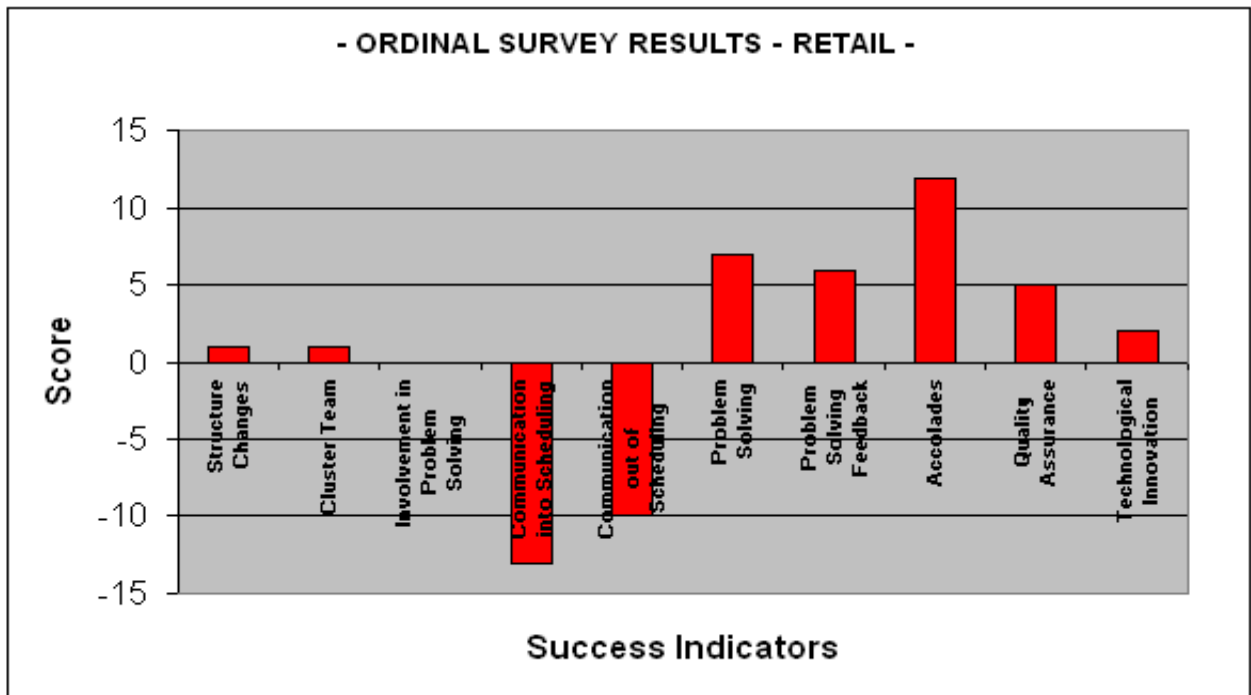
Table D.1: Ordinal survey scores

| STATEMENT | RATING SCALE | | | | |
|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| | Strongly Disagree | Disagree | Undecided | Agree | Strongly Agree |
| STRUCTURAL CHANGES | | | | | |
| There has been a noticeable improvement in scheduling's ability to service our customers, since the re-structure two years ago | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| CLUSTER TEAM | | | | | |
| DC, Pre-planner and Scheduler cluster teams improves scheduling's ability to service our customers effectively | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| COMMUNICATION WITH CUSTOMERS | | | | | |
| I get less calls to my cellphone since direct access to DC was implemented | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| I seldom wait in the wait field when I call in | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Scheduling has improved in their communication to customers on delivery failures, order cuts, etc. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| PROBLEM SOLVING | | | | | |
| Delivery Controllers problem solve effectively | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Delivery Controllers update me with regular feedback | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ACCOLADES | | | | | |
| Delivery controllers make a big effort that should be recognised | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| QUALITY ASSURANCE | | | | | |
| Since quality assurance was implemented in the department, the work quality of schedulers, DC's and pre-planners has improved | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| TECHNOLOGICAL INNOVATION | | | | | |
| Scheduling has improved service by harnessing technology well through SMSing, Schedule Update on IVR, CPP, E-schedule, Pre-plan forecasting tool | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

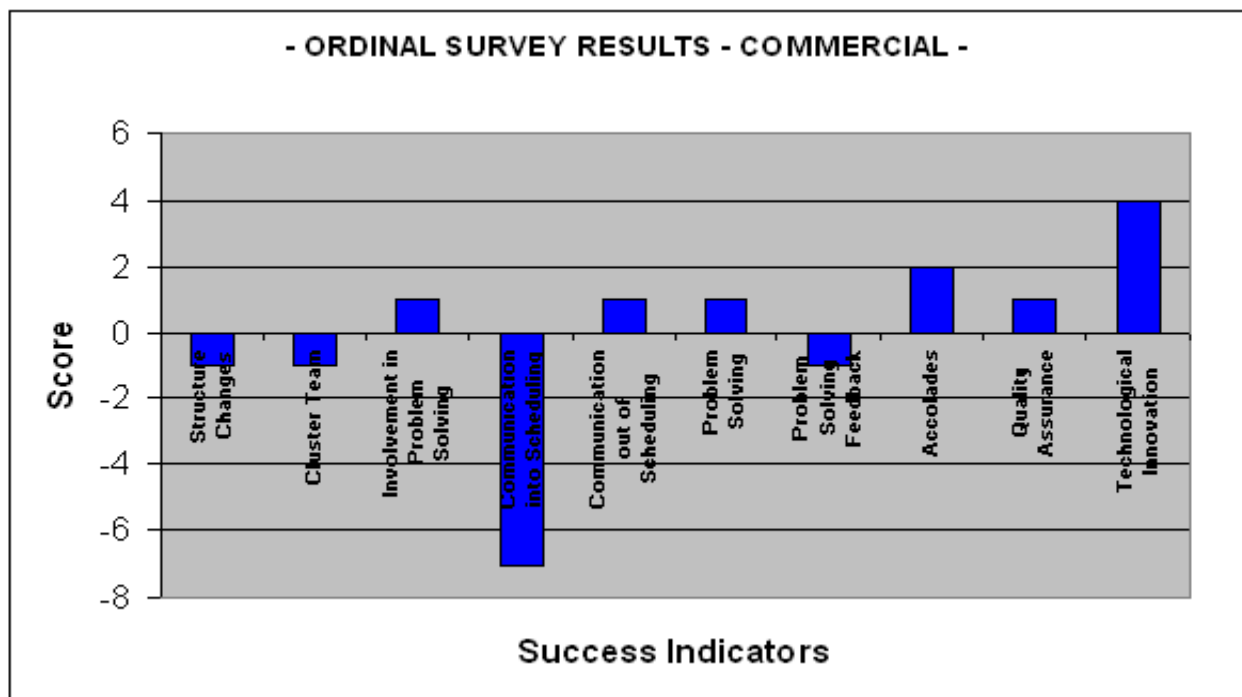
Table D.2 Ordinal survey questionnaire



Graph D.1: Ordinal survey results – Big picture



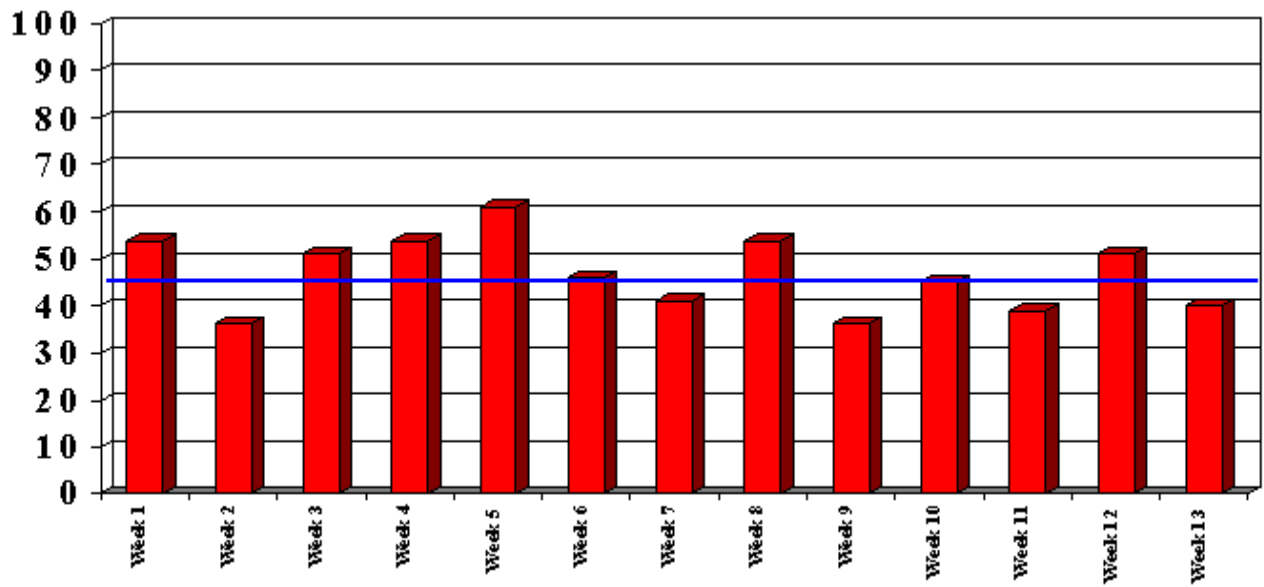
Graph D.2: Ordinal survey results – Retail



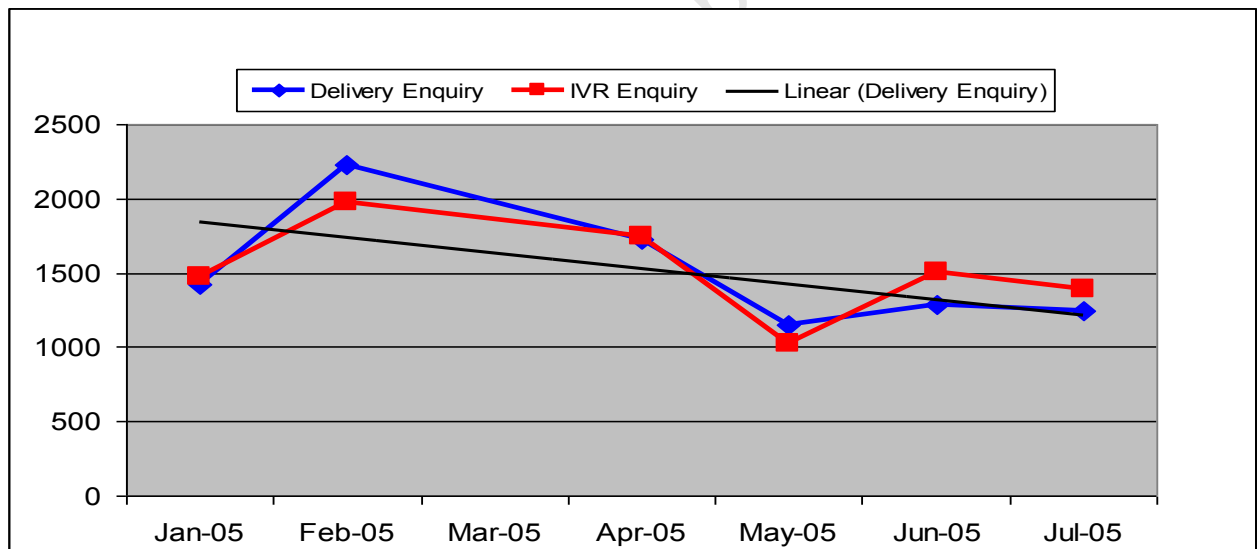
Graph D.3: Ordinal survey results – Commercial

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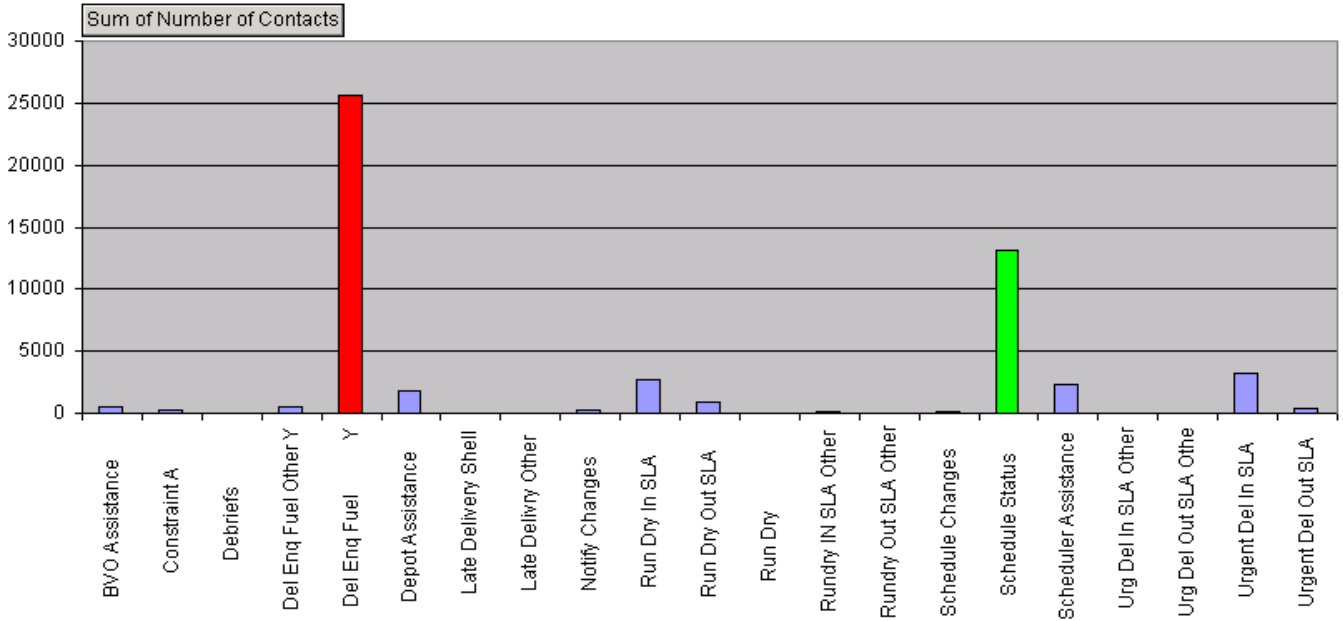
APPENDIX E – GRAPHED DATA RESULTS



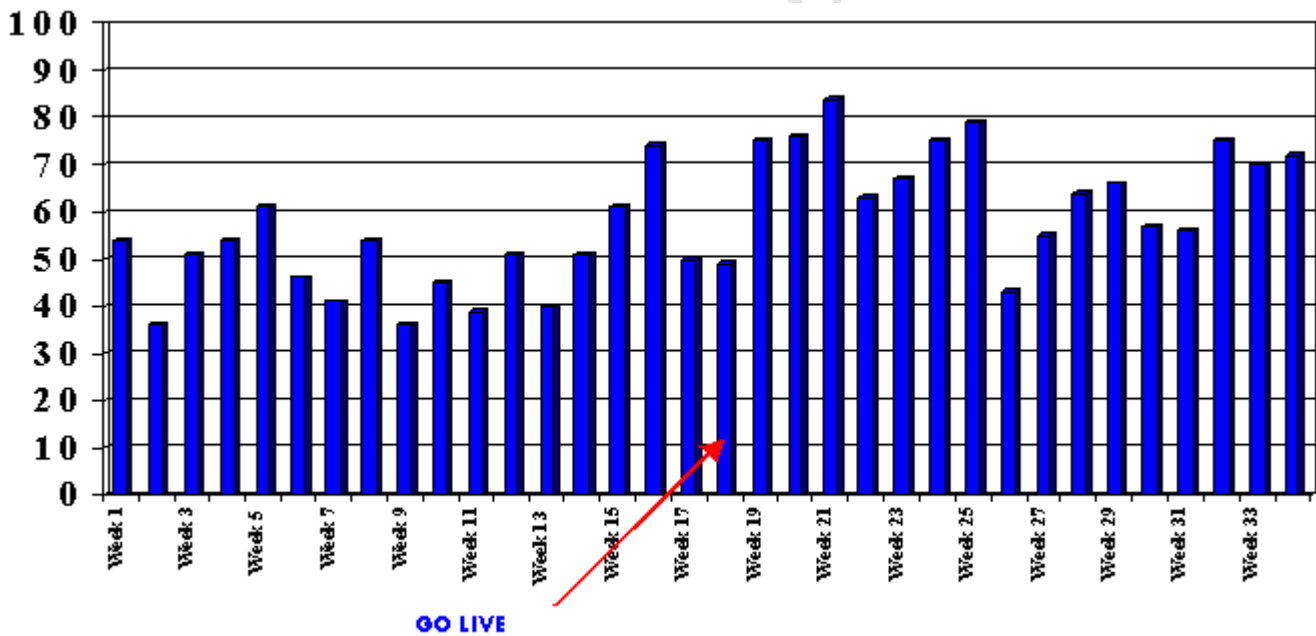
Graph E.1 Inbound service level % after direct access implementation



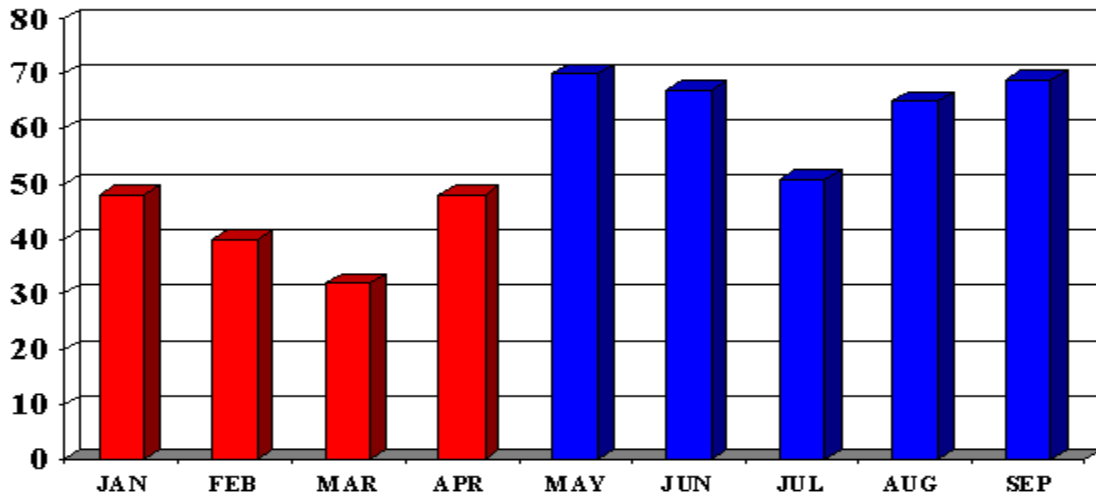
Graph E.2 Comparison – Inbound enquiry calls to delivery controllers vs IVR Calls



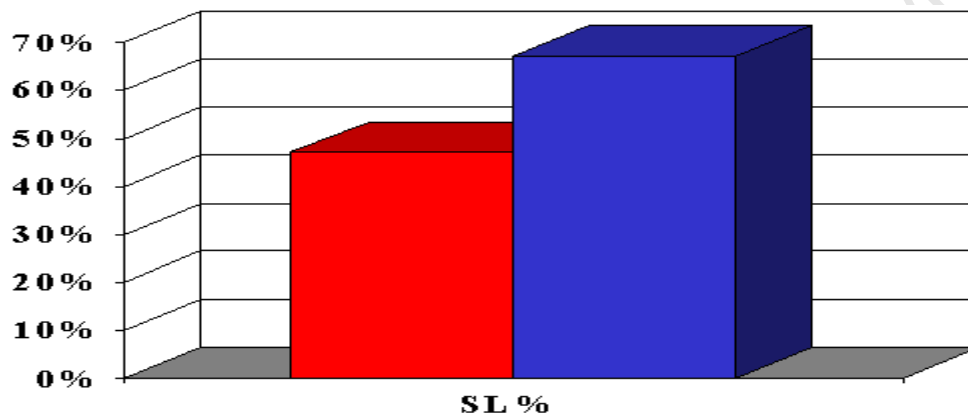
Graph E.3 Inbound call contacts logged by delivery controllers - Annual



Graph E.4 Effects of IVR schedule update go-live on inbound service Level %

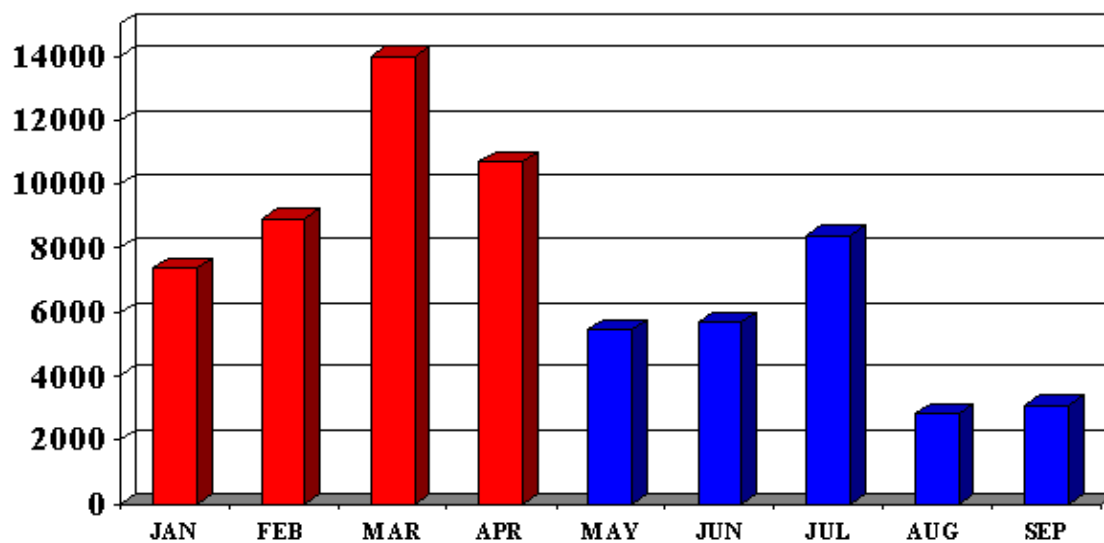


Graph E.5 Effects of IVR Schedule update go-live on inbound service level %

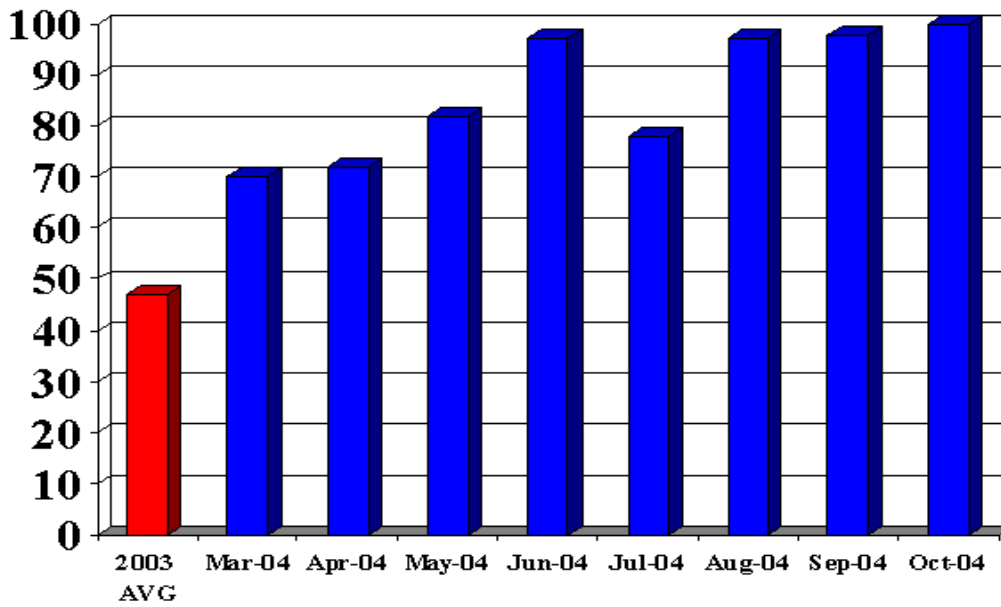


30% INCREASE

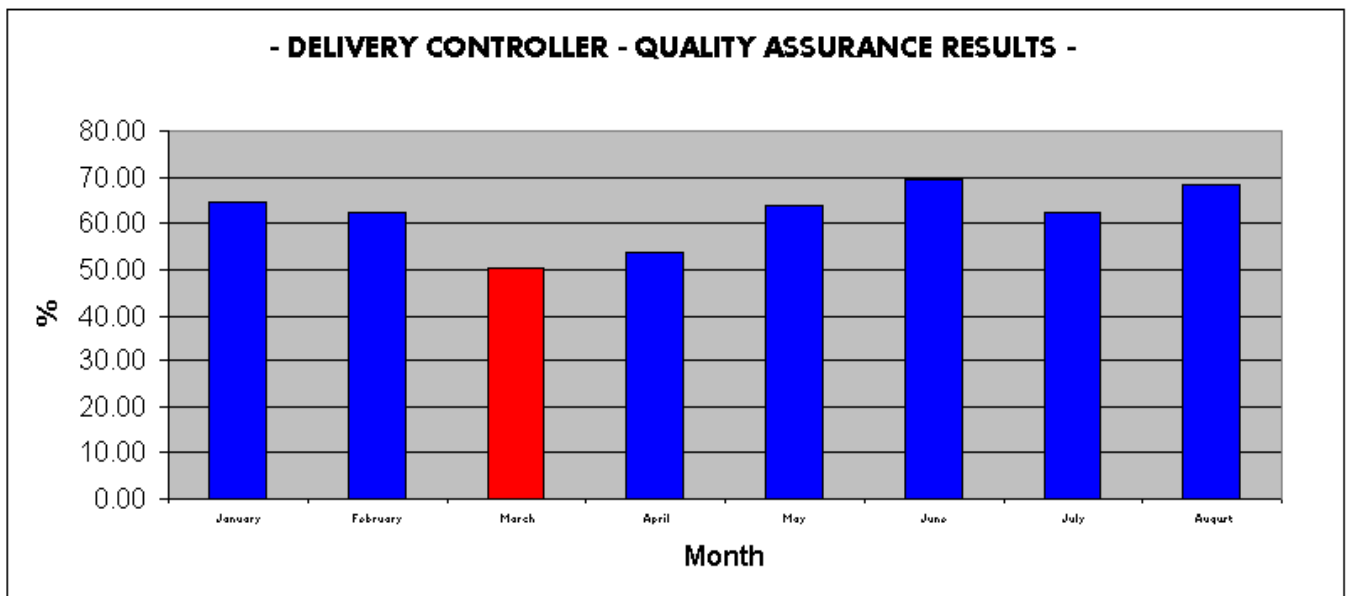
Graph E.6 Combined inbound service level Increase as a result of IVR schedule update go-Live



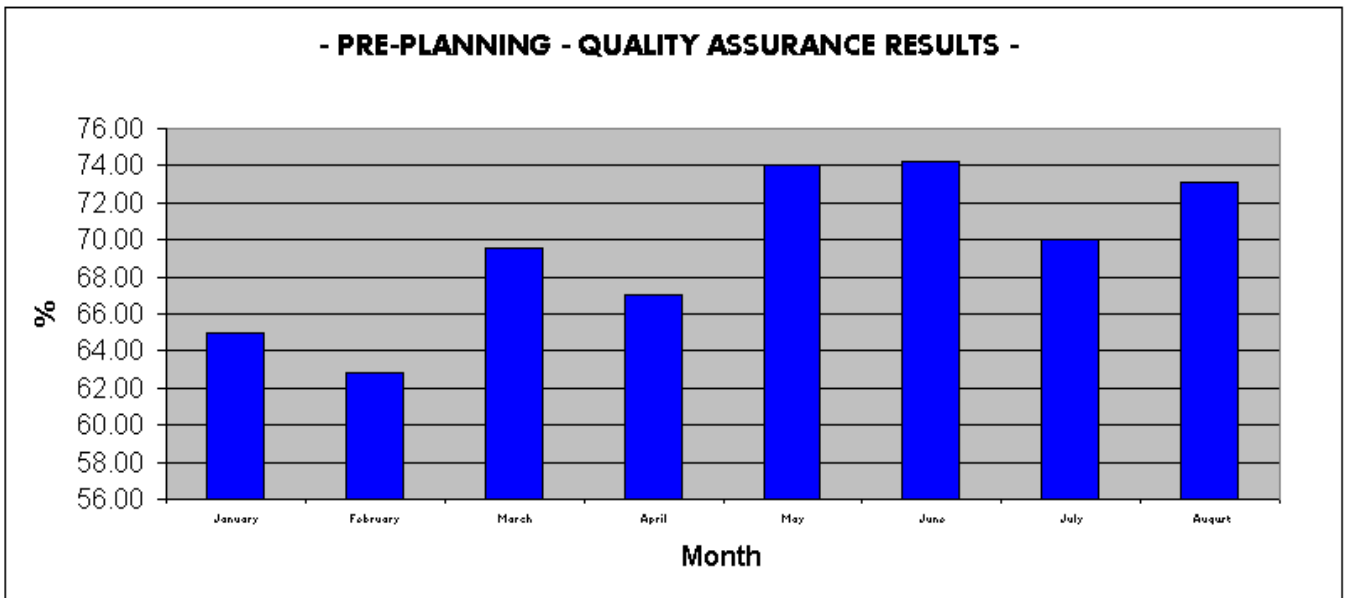
Graph E.7 Inbound call reduction to delivery control as a result of IVR schedule update go live



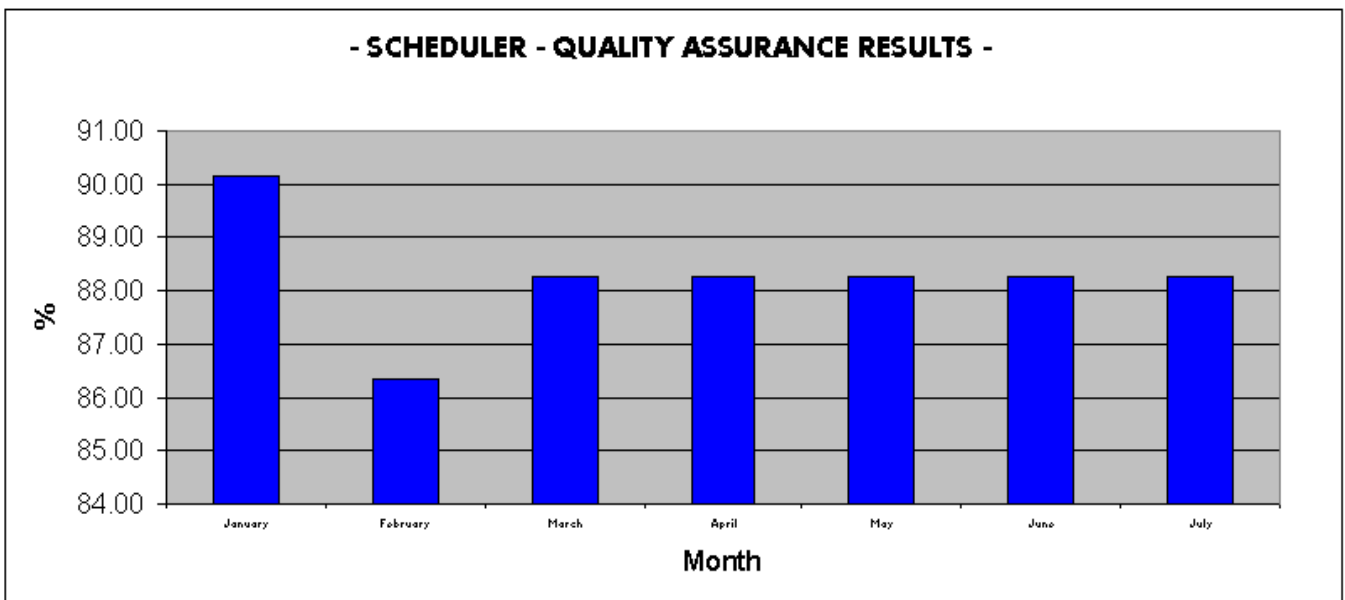
Graph E.8 Phone out success before and after the restructure



Graph E.9 Delivery controller – Quality assurance results



Graph E.10 Pre-planner – Quality assurance results



Graph E.11 Scheduler – Quality assurance results

APPENDIX F – GLOBAL COMPARISON RESULTS

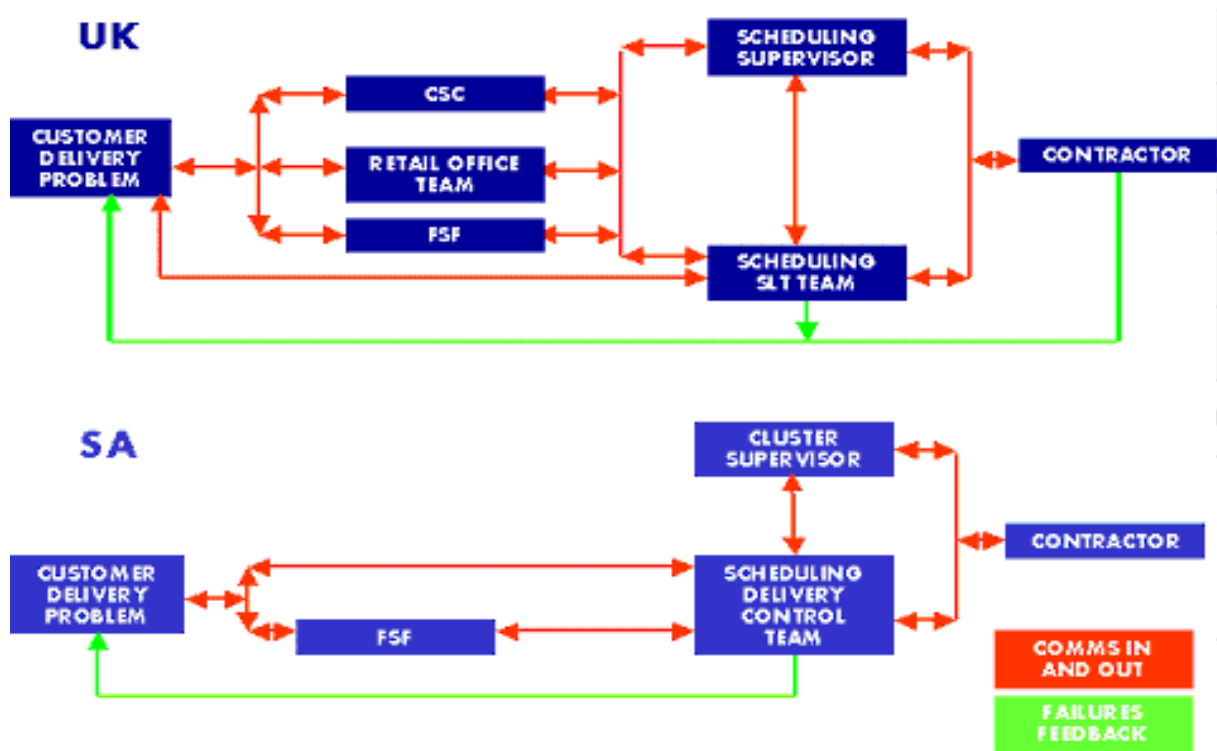
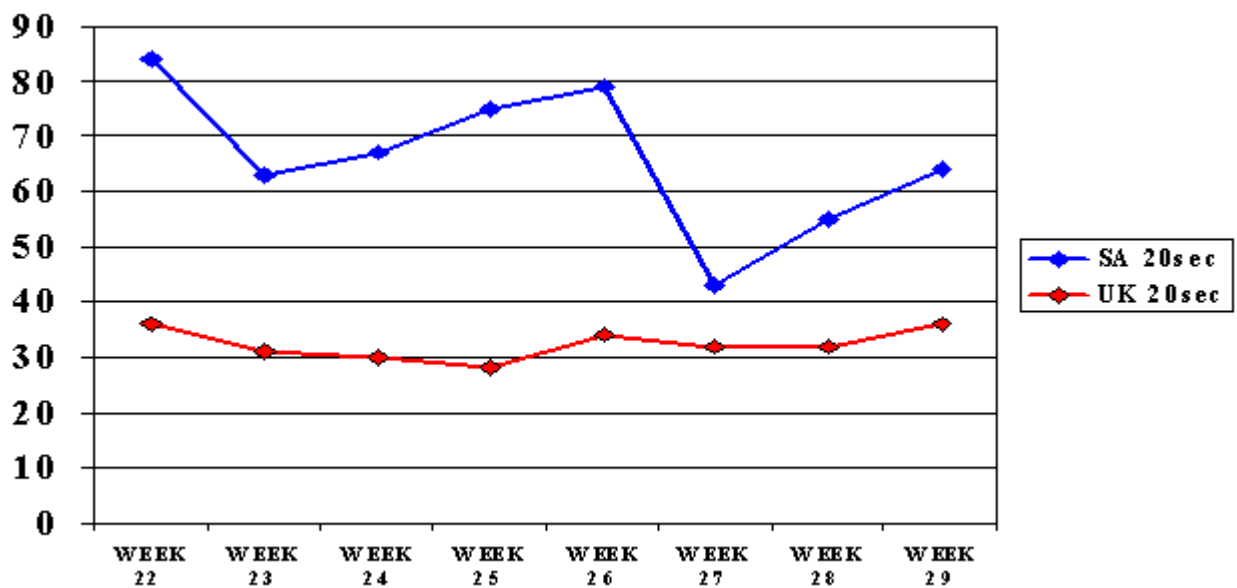
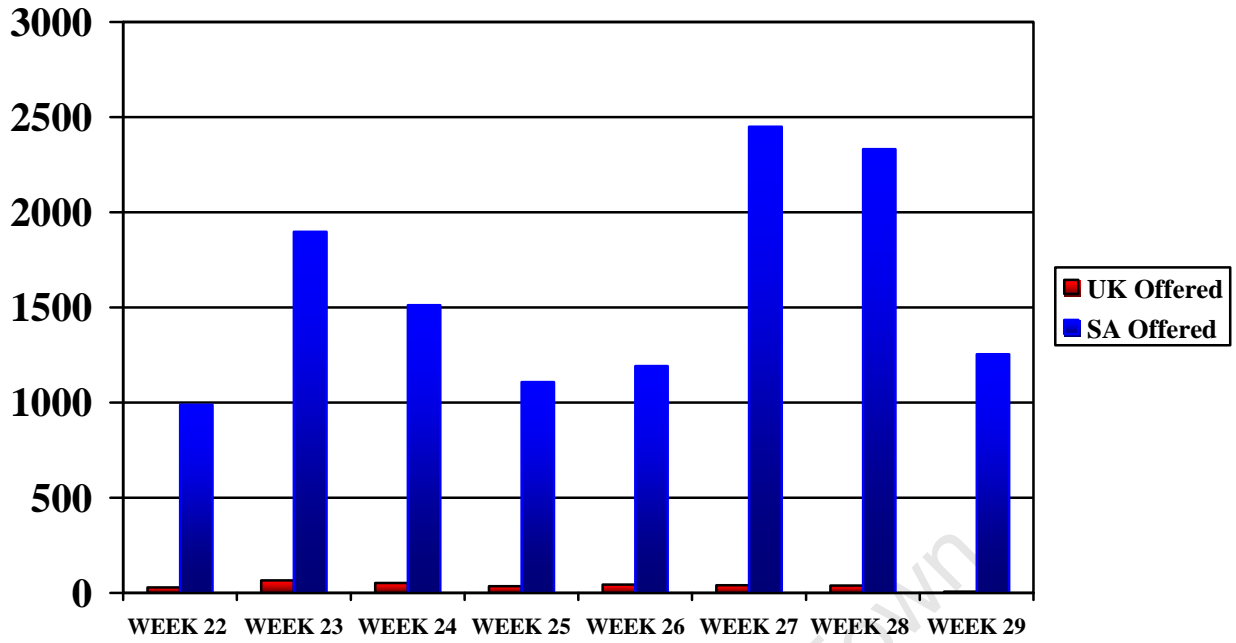


Figure F.1 Comparison – Permitted communication channels – UK vs SA



Graph F.1 Comparison – Inbound service level % - UK vs SA



Graph F.2 Comparison – Offered calls - UK vs SA

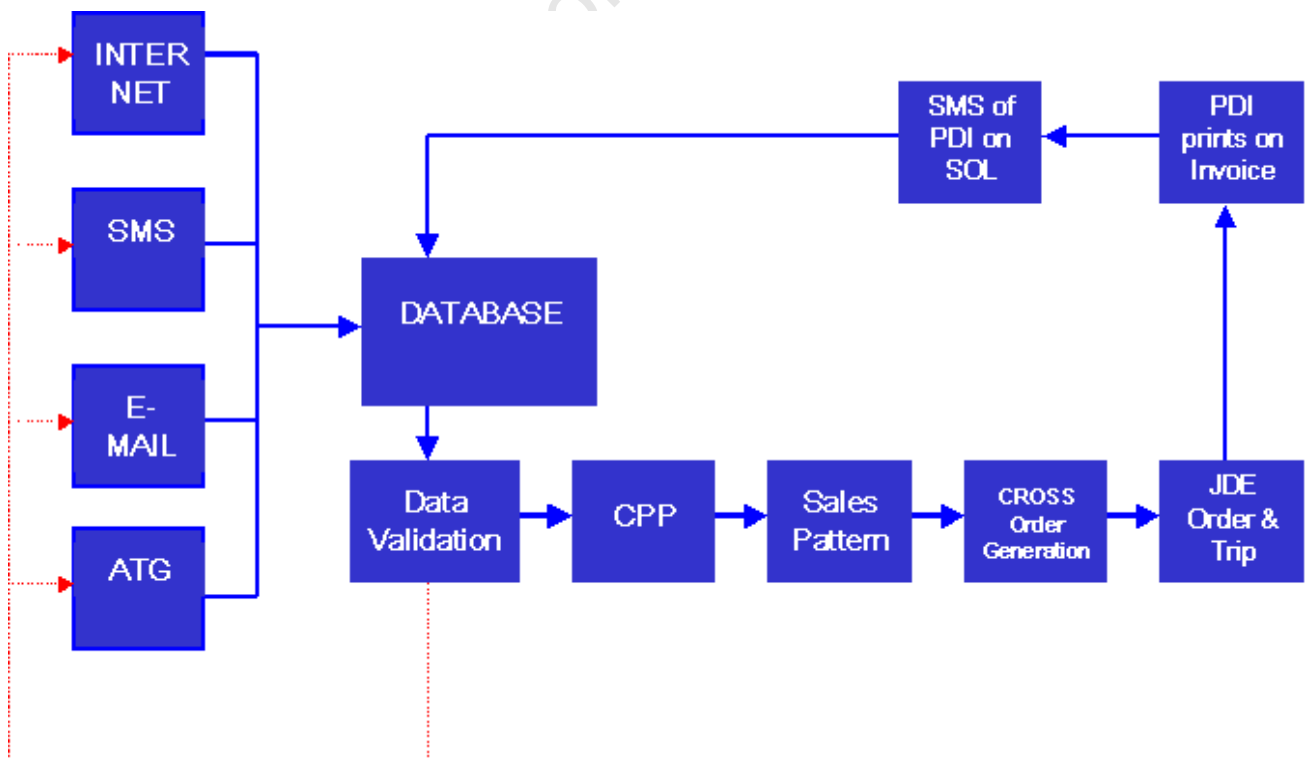


Figure F.2 CROSS Pre-plan process

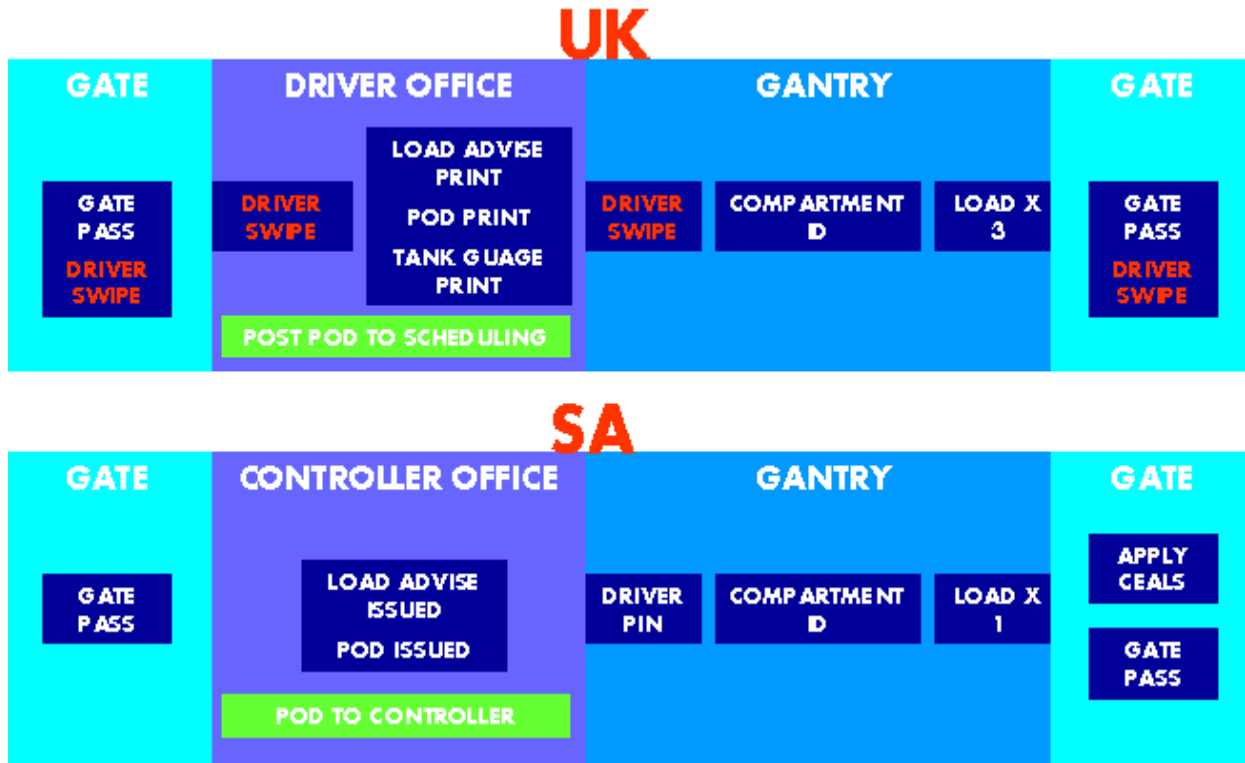


Figure F.3 Depot gate to gate

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APPENDIX G – CRITICAL INCIDENT LOG & LEARNINGS

TABLE G.1 TABLE OF LEARNINGS

| DESCRIPTION | WHY IS THIS A VALUABLE LESSON? | HOW IS THIS VALUE CREATED? |
|--|--|--|
| Poor behaviour must always be confronted immediately | If an individual is not confronted about his/her poor behaviour then it will persist and could be detrimental to a department | Immediate confrontation results in immediate awareness which in turn results in improved behaviour to the good of the department/team |
| The onus is on the line manager to ensure that all staff communicate and behave effectively at all times for the greater good of the team | Level of communication and behaviour by subordinates determines the success of a team | By continually coaching staff in terms of effective communication and behaviour, a line manager can drive his/her team to greatness |
| There is a continuous cycle of department performance deterioration, coaching back to improved performance again and then gradual deterioration once again (performance degradation cycle) | It is essential to have knowledge of this cycle in order to bring about improved department performance | A line manager's ability to coach and continuously address performance issues will ensure overall department success into the future. |
| As a manager, don't avoid conflict situations – effective managers are ones who are not afraid to confront bad behaviour | Conflict in the workplace is essential in order to bring about stability in a team and human relations | A manager who is able to confront staff and are not fearful of potential conflict situations will almost certainly be successful |
| Performance management does not have to be carried out through reprimanding and threatening, but can be done through encouraging people to improve | This is valuable as far too often, managers try to force improved performance by reprimanding in performance reviews or reminding staff of the upcoming ranking session, while they could drive performance without affecting morale | By coaching and encouraging for improved performance through awareness creation, managers are able to drive performance while at the same time motivating individuals to improve for the good of the team. |
| By presenting individual stats in a team forum, managers can encourage competitiveness amongst individuals in a team thereby improving the overall effectiveness of the team | This is valuable because a manager should always strive to create an element of competition amongst team members that encourages them to do better than fellow team mates | By harnessing the competitive nature of humans, managers can ensure improved team performance as individuals in a group compete to achieve the highest individual results |
| Exposing a poor performer does not have to be unpleasant | This is an important lesson as managers often perceive the task of tackling poor performance as a potential conflict situation and as a result avoid the conflict by ignoring the poor performance resulting in a stagnation of team improvement | Value is created when a manager is able to encourage improved performance without having to create an unpleasant situation in order to do so |
| Poor performance can be addressed by focussing on exceptional performance | By placing emphasis on good performers, a manager will not only increase morale of the top performers, but will encourage the poor performers to up their game. | Value is created when focus on top performers not only encourages them to perform even higher, but also encourages the poor performers to follow suite. |
| Most people who belong to a team are conscious of their effort in terms of individual team contribution | By making individuals aware of their level of team contribution, managers can ensure an overall improved team effort | Value is created when individuals realise that their contribution to team is unsatisfactory, they will try harder to ensure acceptance by the team |

| DESCRIPTION | WHY IS THIS A VALUABLE LESSON? | HOW IS THIS VALUE CREATED? |
|---|---|--|
| An individual must be made aware that he/she is performing badly before they can be expected to improve | Very often, managers expect individuals to improve even though they have not been made aware that they are performing badly in relation to the manager's expectations | Value is created when a manager provides regular feedback to his/her staff in terms of how they are performing based on what is expected, thereby creating the awareness that a more concerted effort needs to be made |
| There is a clear cycle of performance associated with all teams where team performance slowly deteriorates over time and needs to be addressed or refreshed by a manager in order to ensure team sustainability | If a manager never addresses performance of his department or team, performance will eventually lead reach a level whereby the team is either ineffective as a team or the team will cease to be viable anymore | Value is created when a manager constantly addresses performance so as to maintain the highest possible level. Performance should be addressed in regular monthly departmental meetings |
| Reward structures are essential in any organisation or department in order to ensure a sustainable high level of performance | Most departments in the organisation either don't use rewards as a means to motivate, or don't use them at all and reward structures can be harnessed to effectively drive up performance | By rewarding individuals, managers can hone in on basic human needs in order to improve individual performance |
| Large valumetric award payments often have less effect on performance as apposed to simple recognition rewards | The size of the reward does not necessarily drive performance or develop loyalty in an individual, it is very often the recognition that drives the performance | A simple reward structure that exposes the individual to his fellow colleagues can have a huge impact on the individual's performance. |
| An individual's performance and level of morale are inseparably linked to the individual's sense of self worth and the individual's perception of personal contribution to the team | The level of morale of an individual determines his or her performance and self worth comes from knowing ones worth to the team in terms of personal contribution | Managers who focus on improving an individual's sense of self worth will inevitably drive up the persons morale and hence his or her level of performance |
| Public recognition and awareness of performance in front of pears results in an increase in an individual's performance and leads to increased morale | Managers must recognise performance publicly, rewards without public recognition have little or no impact on the individuals level of morale based performance | Recognition in front of one's peers boosts performance |
| Public acknowledgement of one individual's performance can positively influence the level of performance of another poorer performing individual | By publicly exposing good performance, a manager can actively influence poorer performing individuals to try harder | A need by an individual to be publicly recognised for good performance may drive the poorer performing individual to up their game |
| Without rewards, overall team performance will drop off to levels that may threaten the team's very existence. | Reward structures are critical milestones on the path of gradual performance degradation, ensuring a performance peak | A reward structure successfully results in a performance peak in a department |
| Managers need to ensure that they keep morale and performance levels of a department at an "operationally acceptable level" in order to ensure department success | A manager who does not continuously take note of, or tune in to the levels of morale and performance of their department will fail in their efforts to improve overall department contribution | When a manager continuously monitors and is aware of staff morale at all times, he/she is in the best position to influence staff performance |

| DESCRIPTION | WHY IS THIS A VALUABLE LESSON? | HOW IS THIS VALUE CREATED? |
|--|---|---|
| Participative management style is a crucial approach when a manager embarks on a change management process in his/her department | The less participation by staff in the change process, the more resistance there will be to the change. | Through constant communication and feedback sessions where staff are permitted to provide feedback and give input into the change process, managers can achieve a smooth and relatively resistance free change process. |
| As a manager the process of challenging poor behaviour and continuously bringing individual's behaviour back in check for the good of the department is a continuous and on-going cycle | A good manager will not let poor behaviour go unchecked, but will continuously challenge poor behaviour for the good of the team | Value is created when continuous challenging of poor behaviour leads to an increase in performance of the team as a whole. |
| It is almost as though, as a manager, one spends ones time continuously "dusting and polishing" your department and then when the dust collects again, out comes the duster. | There is a definite cycle of performance amongst staff and as the leader the onus is on the manager to untiringly action ways to ensure that performance is kept on the highest possible level | Value is created when a manager continuously focuses on team performance and does something about it when performance begins to drop, thereby ensuring constant performance output by the team |
| The level of effective communication between the individuals in a team determines the quality of outputs by that team | If the manager does not address communication issues within a team of people, the team will not be effective leading to poor quality of outputs. | Value is created when effective communication leads to quality team outputs. |
| Implementation of a new idea in a department without effective consultation by the manager to his team will inevitably lead to implementation failure | Consultation with staff and their buy in on a new idea is crucial in order to ensure a successful implementation, without staff buy in implementation could damage morale and ultimately fail. | Value is created when consultation leads to enhancement of the original idea and the successful implementation thereof for the greater good of the team. |
| A manager who continuously focuses on the well being of his/her staff will achieve ultimate success. With focus on people comes performance, with performance comes results | Focus on people first must be at the forefront of any managers approach to his department. With continuous focus on people, performance and results will follow. | Value is created when a manager continuously focuses on the well being of his/her team by showing continued support, coaching the team and managing individual performance, resulting in team success. |
| As a manager, by getting down to your staff's level, breaking down staff/manager barriers builds trust, respect and encourages teamwork | Managers who insist on putting themselves above their staff will fail in their goals. A manager who is prepared to become part of his team in the truest sense will achieve the team goals with his/her team | Value is created when a manager can operate on a level with his team as a team member and not as some higher, more "important" being |
| Experience builds wisdom, and wisdom delivers success. | A good manager is one who drives personal learnings so as to gain wisdom, with wisdom, a manager is able to make good decisions, with the implementation of good decisions comes success. | Value is created when a manager is able to channel his/her learnings or wisdom into effective decision making for the team |
| The key to being a successful manager has nothing to do with the position or title, and has everything to do with how one acts in the position. | A manager is a role model for his team. The team spends every day watching what the manager is doing, how he/she is acting and from this a level of respect is determined | Value is created when a manager is always conscious of setting a good model for his team. What a manager does and how he/she behaves in the management role will reflect in the team. |
| Staff morale and team performance go hand in hand. Morale and team performance levels are in a continuous cycle and a manager must continuously watch morale levels in order to ensure a level performance | Far too often, some managers today think they can still achieve their department or team goals without sparing a thought for the morale of the staff. High morale is crucial in ensuring high levels of performance from a team | Value is created when a manager focuses on morale levels and continuously addresses any issues in morale, this way a sustained level of performance can be achieved. |

| DESCRIPTION | WHY IS THIS A VALUABLE LESSON? | HOW IS THIS VALUE CREATED? |
|---|---|---|
| A manager must always treat all staff on an equal level. Any hint from staff that one individual is being favoured over another can lead to unhappiness in a team that could affect morale and ultimately team performance. | A manager who has "favourites" amongst his/her staff is sure to lose respect amongst his/her team that will inevitably lead to his/her failure to be an effective leader | Value is created when a manager is able to show staff that they are all equally important and on an equal level, that there is no favouritism. |
| A manager, who seeks favour with specific staff and allows certain staff to become too familiar with him, is not a leader and will lose support from his team. | Many managers today expose themselves through favouritism with staff that is very easily picked up by fellow managers and staff alike. This kind of approach to managing people does not define a leader. | A leader is able to ensure a professional and "same level" approach to his team, working together with the collective team and not exposing himself to individual favouritism |
| Appointments of new staff must always be approached with the company's interests at heart. This will ensure an unbiased appointment and lead to the appointment of the best possible candidate for the job. | Very few managers today appoint new staff through a full competency assessment and interview process, preferring to opt for "personal motive/bias" appointments that may result in unfavourable appointments. | Value is created when a manager appoints purely on the basis of finding the right person for the job in the interests of the department and company only. |

CRITICAL INCIDENT LOG 1

Where did the incident occur?

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| The physical location in which the incident occurred? | Scheduling Department |
| Name of organisation & the function of this location in the organisation | Planning of bulk fuel vehicles and bulk fuel stock management and customer problem resolution |

Who was involved?

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| Your role in the situation | Line manager who confronted one of my supervisors over his lack of communication |
| Names and roles of others in the situation | Supervisor to the scheduling department |

What happened – Provide a detailed description

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| The circumstances or events that led to this event | The supervisor reporting to me stubbornly refused to communicate important information to me. On two occasions he asked for leave the day before the leave date and asked for leave during a monthly price change week after I told all my staff that no leave would be granted during that time |
| The situation itself including the activities and conversations of those involved | On requesting leave with me, I informed him that he is requesting leave on a price change week. He then made an excuse that he had to attend to personal family business urgently. IU reluctantly granted him leave. |
| And especially what you did and said as a participant of those involved | On his return from leave I asked to see him and called him into the conference room. I explained to him that he cannot go on ignoring my instructions regarding leave and he cannot continue with his general lack of communication in the workplace, especially with me. I explained that if we continue down this path then things are going to become extremely unpleasant for both of us. I explained that I need his support and that he needs to work on his communication skills as information sharing in our environment is critical. In terms of requesting leave a day before I explained that this kind of action is unfair to the department and disrespectful to management. |
| What was the outcome or result of this incident in terms of the decisions made, conclusions reached, agreements, disagreements, etc. | He became extremely apologetic and promised to make an effort with his communication in the future. A week after I had spoken to him he came to me with his leave requests for the rest of the year, well in advance. Furthermore, he began making an effort to communicate critical operational information to me more readily. |

What did you think and feel at the time?

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| What were you thinking during the time that the incident was occurring | I was thinking about the confrontation and wondering how he would react to it. |
| What did you feel about the part you played in the incident | I feel that it is critical for a manager to confront problems that prevent one from moving ones department forward. As manager one is responsible for the overall success of the team and if a team member is not acting to the benefit of the team as a whole, then that person must be confronted immediately |
| What did you feel about the parts played by the others in the incident | I felt that the supervisor responded well to the confrontation, but he may well have been humouring me, however the outcome was satisfactory |
| What did you feel about the outcome of the incident | Confronting the supervisor was essential in rectifying the behaviour |

What was intended?

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| Why did you act as you did in the incident? What did you intend to accomplish through your actions at the time? | I intended to correct bad behaviour and make the supervisor aware that I was not happy with his actions |
| Why do you think others acted as they did in this incident, and what do you think they intended through their action? | |
| As you look back on this incident, why do you think things happened the way they did? | The incident played out as a result of a conscious decision by me to confront the problem. Had I not acted, the lack of communication would have continued. |

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| <p>What did you think and feel generally about the incident and others like these that happen in your work?</p> | <p>While confrontational situations are unpleasant at the best of times, a good line manager is one that can harness conflict situations in order to put a stop to unsatisfactory behaviour by subordinates.</p> |
| <p>What did you learn?</p> | |
| <p>What do you think you have learnt from your experience in this incident?</p> | <p>Human behaviour is such that if one allows people to continue in a manner that is not conducive to teamwork then they will continue with their bad habits. As a manager you will spend your time correcting peoples behaviour by challenging them and find that you continuously have to bring them back on track. It is almost as though, as manger, you continuously have to “dust and polish”, then as time goes by the dust collects again, and so out comes the duster once again. Continual “refreshing” ensures success in ones team.</p> |
| <p>As you look back on this incident, do you think you could have improved your performance or effectiveness?</p> | <p>No, the result was satisfactory and as line manager, I responded correctly to the situation.</p> |
| <p>What abilities and ideas were involved?</p> | |
| <p>How did ideas or concepts guide your actions in this incident? How were they used or applied in your actions?</p> | <p>Immediate confrontation of a problem is critical. As line manager, I am responsible for the overall effectiveness of my team and so if a team member is not behaving responsibly the onus is on me to correct the behaviour. The strength of a department is dependant on effective and on-going communication in the department.</p> |
| <p>What abilities or skills are needed to perform effectively in incidents like this?</p> | <p>Assertiveness is critical and one must be able to put aside ones fears in terms of conflict situations. One needs to recognise that conflict in the workplace, if dealt with maturely can bring about great results.</p> |
| <p>Looking back on incidents like this one, what ideas or concepts seem to apply best now?</p> | <p>As line manager you do not have to put up with ongoing poor behaviour by an individual. Confronting and talking with an individual, almost always ends with success. Potential conflict situations are never pleasant, but almost always essential. Team success is dependant on good communication amongst individuals in that team. The onus is on management to continuously put people in his/her team “back on track” in order to ensure sustained departmental success</p> |
| <p>INTERPRETATION:</p> | <pre> graph TD A[Poor communication, lack of team focus] --> B[Line manager frustration, team ineffectiveness] B --> C[Confrontation. Potential conflict situation] C --> D[Agreement on way forward] D --> E[Improved communication, behaviour] E --> F[Gradual decline again into poor behaviour] F --> A </pre> |
| <p>EXPLANATION & WRITE-UP:</p> | <p>Poor communication by an individual in a team defines the individual’s lack of team focus, which is turn leads to line manager frustration and could, if behaviour continues, lead to a general reduction in team performance. This results in a confrontational or conflict situation as the individual is confronted by the line manager. The confrontation then leads to improved behaviour from the individual but over time eventually results in degradation of good behaviour and the cycle continues.</p> |

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| PERSONAL REFLECTION: | I find myself trapped in this cycle of trying to keep my staff performing at their best. This cycle of bringing individuals back on track, or coaching if you will is both unrelenting and exhausting and is for me one of the key challenges and frustrations when managing people. |
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CRITICAL INCIDENT LOG 2

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| Where did the incident occur? | |
| The physical location in which the incident occurred? | Meeting room 18 th Floor |
| Name of organisation & the function of this location in the organisation | Scheduling department |
| Who was involved? | |
| Your role in the situation | I was conducting a monthly staff meeting with my staff |
| Names and roles of others in the situation | Delivery controllers |
| What happened – Provide a detailed description | |
| The circumstances or events that led to this event | This was a meeting that we held every month, but on this occasion I decided to present to the staff their individual performance results in a forum in which the whole team was present |
| The situation itself including the activities and conversations of those involved | I began the meeting by putting up the teams performance on an individual level from the highest score to the lowest so that they could see individual performance in relation to fellow team members. |
| And especially what you did and said as a participant of those involved | I went on to discuss the performance results focussing on the top performers and congratulating them publicly. As a result the individuals who scored the lowest results became uneasy and pockets of discussion broke out amongst individuals. One of the staff members immediately became angry and began challenging the validity of the stats. I responded calmly and proceeded to give valid explanations. The individual eventually fell silent as she realised that she was not able to fault the results that I had presented to the group. |
| What was the outcome or result of this incident in terms of the decisions made, conclusions reached, agreements, disagreements, etc. | After the meeting, the same poor performer approached me and called me aside, explaining that she was very worried about her performance, was not aware that she was doing so badly and that I had her commitment that she would try very hard to improve her performance. |
| What did you think and feel at the time? | |
| What were you thinking during the time that the incident was occurring | This incident played out exactly as I had hoped it would. During the incident it dawned on me that I had just improved poor performance through focus on exceptional performance |
| What did you feel about the part you played in the incident | I was able to control the situation and drive it to an inevitable conclusion, while developing a new theory around motivation |
| What did you feel about the parts played by the others in the incident | I did not expect to get called aside and was expecting more challenge from the individual after the meeting |
| What did you feel about the outcome of the incident | The outcome of the incident is exactly what I had hoped for going into the meeting yet I did not expect it to be so successful |
| What was intended? | |
| Why did you act as you did in the incident? What did you intend to accomplish through your actions at the time? | I intended to drive poor performance through the reinforcement of good performance thereby avoiding the need to try to improve poor performance through the planned performance process. |
| Why do you think others acted as they did in this incident, and what do you think they intended through their action? | I feel that the individual acted as she did as a result of the shock of being shown up among her fellow team mates, this led to her challenge and ended in her concern about the need to improve her position for the sake of group acceptance |

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| <p>As you look back on this incident, why do you think things happened the way they did?</p> | <p>I feel strongly that exposure of poor performance forced the individual to act to improve, that through her embarrassment she was shocked into action</p> |
| <p>What did you think and feel generally about the incident and others like these that happen in your work?</p> | <p>I feel that far too often, managers damage morale by taking on the poor performance through the disciplinary procedure or through reprimanding, which could in many respects result in even poorer performance into the future.</p> |
| <p>What did you learn?</p> | |
| <p>What do you think you have learnt from your experience in this incident?</p> | <p>Members of a team must be able to benchmark their personal performance against that of the team. Emphasis on exceptional performance can motivate others to want to try harder, to achieve on a higher level. Exposure of poor individual performance to a team creates embarrassment but can lead to positive results.</p> |
| <p>As you look back on this incident, do you think you could have improved your performance or effectiveness?</p> | <p>Given the result achieved I could have spent a bit more time on the top achievers in order to bring about positive reaction from other poor performers in the group</p> |
| <p>What abilities and ideas were involved?</p> | |
| <p>How did ideas or concepts guide your actions in this incident? How were they used or applied in your actions?</p> | <p>Motivation through exposure Motivation through awareness Motivation by allowing the person to benchmark personal results against that of others in the team Motivating staff is not about rapping them over the knuckles, there are other far more creative means</p> |
| <p>What abilities or skills are needed to perform effectively in incidents like this?</p> | <p>As a manager presenting stats of this nature one must expect challenge and have thorough knowledge of what one is presenting so that the challenges posed can be met with good rebuttal</p> |
| <p>Looking back on incidents like this one, what ideas or concepts seem to apply best now?</p> | <p>If one wants poor performers to try harder then exposure of such performance to the team creates self awareness and drives behaviour in a positive direction</p> |
| <p>INTERPRETATION:</p> | <pre> graph TD A[Action to improve] --> B[Poor performance results] B --> C[Exposure by benchmarking against individual team results] C --> D[Embarrassment] D --> E[Anger and challenge] E --> F[Concern and sense of urgency to improve for the sake of team acceptance] F --> A C --> B </pre> |
| <p>EXPLANATION & WRITE-UP:</p> | <p>An individual's poor performance leads to a natural exposure against individual team performance. This in turn leads to embarrassment in front of fellow team members, which fuels anger and generates challenge. Eventually reality sets in resulting in genuine concern for personal results that forces the individual to act to improve</p> |
| <p>PERSONAL REFLECTION:</p> | <p>As a line manager, this learning is something that I have harnessed in every meeting and the results have been outstanding. I am able to expose poor performance while keeping team motivation and morale in tact, even to the point of improving team motivation.</p> |

CRITICAL INCIDENT LOG 3

Where did the incident occur?

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| The physical location in which the incident occurred? | In the scheduling department |
| Name of organisation & the function of this location in the organisation | Scheduling department |

Who was involved?

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| Your role in the situation | I was presenting the first reward ceremony through which I recognise good performance in the department every month |
| Names and roles of others in the situation | Scheduling department staff members |

What happened – Provide a detailed description

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| The circumstances or events that led to this event | I had just completed the handing out of vouchers and certificates to the top performers in the first ever performance reward ceremony when I was approached by a staff member |
| The situation itself including the activities and conversations of those involved | The staff member came up to me looking very worried and asked if she could speak with me and so I took her aside as she looked almost tearful |
| And especially what you did and said as a participant of those involved | I asked her what was wrong and she explained to me that she is blown away by what I had just done. On establishing that she was referring to the reward ceremony she went on to explain that no one has ever recognised performance in that manner, that it was really appreciated and that everyone commented on how fantastic it was. She explained that the recognition received was the best that the staff in scheduling had ever received and thanked me. On my return to my desk there were three e-mail notes in my in box with similar gratitude for public recognition. |
| What was the outcome or result of this incident in terms of the decisions made, conclusions reached, agreements, disagreements, etc. | I could see a general excitement amongst the staff that went on for several days after the incident and at this point I decided to make the reward ceremony a regular event. Up until then I was only going to do it twice a year. |

What did you think and feel at the time?

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| What were you thinking during the time that the incident was occurring | I was very surprised and did not expect such a positive response from the staff. |
| What did you feel about the part you played in the incident | As the manager of the department I felt a sense of urgency for recognising people who work hard in their jobs |
| What did you feel about the parts played by the others in the incident | I could hardly believe the positive response |
| What did you feel about the outcome of the incident | The most gratifying situation that I have ever been party to |

What was intended?

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| Why did you act as you did in the incident? What did you intend to accomplish through your actions at the time? | To recognise good performance with the intention that people deserved to be recognised not necessarily to motivate the team to try harder |
| Why do you think others acted as they did in this incident, and what do you think they intended through their action? | Everyone wants to be recognised and feel a sense of belonging or importance |
| As you look back on this incident, why do you think things happened the way they did? | I feel that today, people are seldom recognised for good performance so when it does happen, we are not used to it and so this in turn drives a very positive response to it |
| What did you think and feel generally about the incident and others like these that happen in your work? | This type of incident seldom happens and when it does eventually take place, it is almost magical for all parties |

What did you learn?

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| What do you think you have learnt from your experience in this incident? | The key learning is that human beings thrive on recognition as it develops a sense of self worth, acceptance and a sense of belonging to a team. Another key learning is the fact that you don't have to pay people a volumetric or bonus to motivate them and very often a bit of recognition is all that people are looking for. |
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| As you look back on this incident, do you think you could have improved your performance or effectiveness? | I feel that I should have realised earlier the importance of recognition in the workplace as I also enjoyed this before I became a manager. |
| What abilities and ideas were involved? | |
| How did ideas or concepts guide your actions in this incident? How were they used or applied in your actions? | That recognition through a reward structure must improve general performance over time. |
| What abilities or skills are needed to perform effectively in incidents like this? | One needs to recognise the importance of rewarding someone for effort, as a manager one needs the skills to successfully improve team performance |
| Looking back on incidents like this one, what ideas or concepts seem to apply best now? | Recognition through reward results in increased self esteem that in turn results in an increased sense of belonging that drives individuals to contribute more effort to team objectives. The monetary value of a reward is actually irrelevant, it is the public recognition that counts. Value metric systems used by some managers, whereby large sums of money are paid out in salaries to employees may have the same, or even less effect on an individuals drive to improve performance. |
| INTERPRETATION: | <pre> graph TD A[Exceptional performance] --> B[Reward recognition] B --> C[Sense of individual contribution to the team] C --> D[Improved self esteem] D --> E[Greater sense of belonging to the team] E --> F[Improves morale] F --> A </pre> |
| EXPLANATION & WRITE-UP: | Exceptional performance of an individual that is recognised publicly through a reward structure will lead to improved understanding of an individuals contribution to the team, that in turn leads to an improvement in the individual's self esteem resulting in a greater sense of belonging to the team thereby driving up morale which leads again to exceptional performance |
| PERSONAL REFLECTION: | A key learning for me is that as a manager you do not have to give out unreasonable sums of money to motivate someone. All that is required is to recognise individual performance, not only does it lead to improved performance of the individual, but can also spur competition between individuals, thereby driving up the overall team performance. Recognising top performance must take place regularly thereby ensuring ongoing and sustained team performance. |

| CRITICAL INCIDENT LOG 4 | |
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| Where did the incident occur? | |
| The physical location in which the incident occurred? | Scheduling Department |
| Name of organisation & the function of this location in the organisation | Department under review |
| Who was involved? | |
| Your role in the situation | Line Manager to the Supervisor who I guided and corrected in the decisions that he took |
| Names and roles of others in the situation | Supervisor on the floor of the scheduling department |
| What happened – Provide a detailed description | |

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| <p>The circumstances or events that led to this event</p> | <p>I instructed my Supervisor to complete the administrative preparation for a new shift roster that I had completed for the shift staff. My instruction to him was to complete it and not to implement until he had engaged the staff. I then went on to explain to him that he needs to engage the staff first in a participative discussion in order to sell the new shifts to them and warned him that if he doesn't he is going to sit with complaints and unhappiness from the staff</p> |
| <p>The situation itself including the activities and conversations of those involved</p> | <p>Once he had completed typing up the roster he immediately posted it on the board. I realised this after I saw a group of staff gathered around it. Two days after putting it up the supervisor went on duty, but before then I called him in to have a discuss the fact that he had ignored my instruction</p> |
| <p>And especially what you did and said as a participant of those involved</p> | <p>I asked him if he had engaged the staff before putting up the new shift roster, to which he replied no. I then went on to warn him about disobeying my instruction and explained again why it is so crucial to sell a change as big as this one to the staff first. He apologised and assured me that the staff would be happy with it.</p> |
| <p>What was the outcome or result of this incident in terms of the decisions made, conclusions reached, agreements, disagreements, etc.</p> | <p>The Supervisor went on leave two days later and in his absence the staff began approaching me. They complained bitterly about the fact that we had not introduced the shifts to us first. I then brought the staff together and proceeded to engage them in a participative management approach in which the importance of their input and feedback in the rolling out of the new roster was brought to the fore.</p> |
| <p>What did you think and feel at the time?</p> | |
| <p>What were you thinking during the time that the incident was occurring</p> | <p>I could not understand the lack of management experience from my supervisor in thinking that it was okay just to implement something new without any change management process, it angered me that I had warned him of the outcome and that I had to pick up the pieces once this had become reality</p> |
| <p>What did you feel about the part you played in the incident</p> | <p>My role in my department in terms of guidance on all levels is crucial, that even though I am not implementing everything, I am still responsible to ensure that my supervisors implement changes correctly, following the correct procedures with staff and change management undertakings.</p> |
| <p>What did you feel about the parts played by the others in the incident</p> | <p>My supervisor clearly didn't listen and on his return from leave I had to coach him with the lessons learnt</p> |
| <p>What did you feel about the outcome of the incident</p> | <p>I was happy with the outcome, but sometimes wish that staff interaction and communication would come more naturally to them</p> |
| <p>What was intended?</p> | |
| <p>Why did you act as you did in the incident? What did you intend to accomplish through your actions at the time?</p> | <p>I acted to ensure that the new shift roster was implemented correctly and when this did not happen the first time, I ensured that the supervisor had learnt from his mistakes.</p> |
| <p>Why do you think others acted as they did in this incident, and what do you think they intended through their action?</p> | <p>I feel that the supervisor, being 15 years my senior thought he understood the situation and outcome better than I did, I feel that he rolled out the new shift roster with no communication or change management initiatives, a manner in which he has always done things, only in the past he has never been corrected.</p> |
| <p>As you look back on this incident, why do you think things happened the way they did?</p> | <p>I know from experience that when one needs to implement a crucial change in a department, success is directly linked to the willingness of staff to accept the change, so involving them in the change process is crucial to acceptance. The staff reaction was therefore no surprise.</p> |
| <p>What did you think and feel generally about the incident and others like these that happen in your work?</p> | <p>Very often managers take crucial decisions that effect the way that staff work without consulting or engaging the staff properly and this just ends in unhappiness that can last months and even years.</p> |
| <p>What did you learn?</p> | |

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| What do you think you have learnt from your experience in this incident? | Participative management is and change management go hand in hand. Thorough change management results in success |
| As you look back on this incident, do you think you could have improved your performance or effectiveness? | I definitely have increased my watch over my supervisors actions towards staff so as to ensure that they are always taking action that never negatively affects morale. |
| What abilities and ideas were involved? | |
| How did ideas or concepts guide your actions in this incident? How were they used or applied in your actions? | Asking the staff what issues they had with the shifts and then making changes to align as closely to those requirements resulted in acceptance by most. Once staff see that they have a say in the change, acceptance is not far behind. Participative management style in every action taken by a manager is crucial to being a successful one in the 21 st century. |
| What abilities or skills are needed to perform effectively in incidents like this? | One needs to be in tune with the needs of one's staff and to be able to communicate effectively showing staff that you actually do care about their well being in the workplace at all times. |
| Looking back on incidents like this one, what ideas or concepts seem to apply best now? | As above |
| INTERPRETATION: | <pre> graph TD A[Change implemented with no change management] --> B[Staff unhappiness] C[Change implemented] --> A D[Acceptance of the change] --> C E[Participative management style adopted] --> B F[Feeling of involvement in the change decision] --> E F --> G[Acceptance of the change] </pre> |
| EXPLANATION & WRITE-UP: | A change was implemented in the department with no communication to staff and without any form of change management process. This led to immediate unhappiness amongst staff. Once the manager adopted a participative management approach involving the opinions of all staff, the staff immediately accepted the change and as a result it was implemented immediately. |
| PERSONAL REFLECTION: | |

CRITICAL INCIDENT LOG 5

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| Where did the incident occur? | |
| The physical location in which the incident occurred? | Scheduling Department |
| Name of organisation & the function of this location in the organisation | Department under review |
| Who was involved? | |
| Your role in the situation | I had a conversation with my line manager about the weekend conference that I held with my staff |
| Names and roles of others in the situation | My line manager, Order Fulfilment Manager |
| What happened – Provide a detailed description | |
| The circumstances or events that led to this event | I took my staff on an end of year weekend team build and after the weekend we created a photo wall in the department, of all our socials |

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| <p>The situation itself including the activities and conversations of those involved</p> | <p>My line manager came into the department and saw the photos up on the wall and asked me what occasions they were. I explained to him that they were all the photos that we had taken on our team building outings including the conference that we went on. He then proceeded to tell me that I shouldn't spend so much money on the staff. He went on to explain that I should also always ask his permission when spending my entertainment budget.</p> |
| <p>And especially what you did and said as a participant of those involved</p> | <p>I was shocked. I told my line manager that I believed in having staff socials and investing in people as it results in team spirit, brings about team cohesion and builds relationships amongst team members. I told him that by investing in staff in this manner that the company benefits through increased performance as a result. I explained to him that I don't ask permission to spend my budget as the company and senior management have entrusted me with it, I am accountable and will therefore ensure that I do not over spend.</p> |
| <p>What was the outcome or result of this incident in terms of the decisions made, conclusions reached, agreements, disagreements, etc.</p> | <p>My line manager didn't appear to be too happy with my response and continued to press his points. There was no concrete outcome other than the fact that we seemed to agree to disagree before the conversation changed to more pressing business.</p> |
| <p>What did you think and feel at the time?</p> | |
| <p>What were you thinking during the time that the incident was occurring</p> | <p>I was amazed at my line manager's view of staff that they are almost not worth the effort, focus and spend. I thought his approach to the staff team builds was both "old school" and autocratic. I was thinking how dislike I have for a management style whereby subordinates are not empowered to take decisions on their own. In this case I was reprimanded for not getting budget approval when, as a manager I have the authority to authorise budget spend on my allocation</p> |
| <p>What did you feel about the part you played in the incident</p> | <p>I felt at the time that I had a better management approach to my staff than he does and I felt the need to tell him that I insist on being empowered in my position and strongly believe that all a manager has to do to be a good one and gain respect from his staff is to show an interest in them through team building.</p> |
| <p>What did you feel about the parts played by the others in the incident</p> | <p>I feel that my line manager was completely out of line and didn't appreciate his management approach to the situation</p> |
| <p>What did you feel about the outcome of the incident</p> | <p>I felt deflated and disappointed that my line manager didn't share the same management principles that I have. I felt that I lost respect for him through this incident</p> |
| <p>What was intended?</p> | |
| <p>Why did you act as you did in the incident? What did you intend to accomplish through your actions at the time?</p> | <p>I stood up for what I believe in and that is my staff's, my team's well being because I know that happy team members are hard working ones and I practice a participative management style that my staff appreciate.</p> |
| <p>Why do you think others acted as they did in this incident, and what do you think they intended through their action?</p> | <p>I feel that my line manager was trying to impose control over me through an extremely autocratic and old school approach to the situation</p> |
| <p>As you look back on this incident, why do you think things happened the way they did?</p> | <p>I feel that one will always have this difference of opinion where older managers interact with new ones in today's corporate world</p> |
| <p>What did you think and feel generally about the incident and others like these that happen in your work?</p> | <p>Out with the old management style and in with the new! Company's need to realise this and should let the young lead in a fast paced market place</p> |
| <p>What did you learn?</p> | |

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| <p>What do you think you have learnt from your experience in this incident?</p> | <p>Focus on poor management style teaches me what not to do as a manager and builds knowledge to become an effective leader. Putting time money and effort into staff delivers return in the form of high performance to the company. Old management autocratic style management have no place in the highly pressured and fast paced environment in which we find ourselves today</p> |
| <p>As you look back on this incident, do you think you could have improved your performance or effectiveness?</p> | <p>No</p> |
| <p>What abilities and ideas were involved?</p> | |
| <p>How did ideas or concepts guide your actions in this incident? How were they used or applied in your actions?</p> | <p>I have increased the morale and turned my team into a cohesive unit through constant focus on them both individually and as a team. My ability to get down and engage staff on their level has built both trust and respect and therefore I will continue having team building outings.</p> |
| <p>What abilities or skills are needed to perform effectively in incidents like this?</p> | <p>Stand up for what you believe in. Experience builds wisdom, wisdom delivers success</p> |
| <p>Looking back on incidents like this one, what ideas or concepts seem to apply best now?</p> | <p>Focus on staff and team work brings about improved team performance. Never place yourself above your staff just because you hold the title. The key to being a successful manager has nothing to do with the position, and has everything to do with how you act in the position</p> |
| <p>INTERPRETATION:</p> | |
| <p>EXPLANATION & WRITE-UP:</p> | <p>The team building exercise planned by management is observed by a manager with an autocratic “old style” approach to management. He is immediately governed by his personal thought constructs that lead him to believe that money should not be spent on staff and that he should always approve budget spends, even though the company has placed the budget spend responsibility and ownership on individual line managers. His perception leads to immediate disapproval of the team build outing and in turn results in a differing of opinion due to two distinct management styles.</p> |
| <p>PERSONAL REFLECTION:</p> | <p>I get excited when I observe the differences in management style of older managers as apposed to my generation’s approach. I feel that young managers today bring a participative and refreshing approach to managing people that makes the workplace a place that a staff member wants to be part of. If there is a young manager heading up a department one can be sure to find plenty of focus on team work and staff morale focus. In departments headed up by older managers there is a clear autocratic approach “I say you do” that is both stifling and affects morale.</p> |

CRITICAL INCIDENT LOG 6

Where did the incident occur?

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| The physical location in which the incident occurred? | Scheduling department |
| Name of organisation & the function of this location in the organisation | Department under review |

Who was involved?

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| Your role in the situation | Line manager to a staff member who was being over friendly or seeking favour so as to improve his chances of employment to a new position that was created in the department |
| Names and roles of others in the situation | Staff member |

What happened – Provide a detailed description

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| The circumstances or events that led to this event | I posted a new position in the department that came about as a result of new technology that was being implemented. One of my staff members applied for the position and then confronted me about it |
| The situation itself including the activities and conversations of those involved | I was standing making coffee and the staff member approached me and began discussing the position, asking me whether I received his application. I responded confirming that I had received his application and then he asked me if he could have a word in private. I agreed to speak to him as it is my policy never to avoid staff if they want to talk to me in private. I took my coffee and followed him into the conference room. We sat down and he proceeded to tell me that I should really consider him for the job, that he has worked extremely hard for me in the past two years and he began detailing his contributions to the department. |
| And especially what you did and said as a participant of those involved | I noticed that in the past two weeks since I had posted the job, that he had been over friendly and being the likeable person that he was I couldn't help but think about him as a preferred candidate for the position. When we had finished our discussion, I was really convinced that he could be quite good for this new position. I had fallen for his over friendliness. |
| What was the outcome or result of this incident in terms of the decisions made, conclusions reached, agreements, disagreements, etc. | Two days later I arranged my interview panel and decided to interview the staff member in question and two other applicants after completing competency assessments on all ten staff that had applied for the position. The interviews were conducted and the staff member in question scored the highest through the interview process. Days later I still could not take the decision to appoint this staff member as I was concerned about the complaints of rudeness that I had had from other staff in the past. Based on this I took the decision not to appoint and appointed someone who hadn't even applied for the job, but who had all the right credentials. The appointment was a major success. |

What did you think and feel at the time?

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| What were you thinking during the time that the incident was occurring | While this was unfolding I did reach a point where I had to admit that I nearly fell for the over friendliness. When I took the decision not to appoint the staff member in question, I knew that he would be very upset and this after he had opened his heart up about the position a few days before, and I wondered if I was taking the right decision. |
| What did you feel about the part you played in the incident | I almost can't believe that I made myself vulnerable to being manipulated. |
| What did you feel about the parts played by the others in the incident | I felt that the staff member new he was suitable for the position and I feel that he deliberately cornered me to improve his chances of being appointed. His friendliness towards his manager was just a front. |
| What did you feel about the outcome of the incident | I definitely felt good about the outcome as I had not fallen into a trap, I kept the company's interests at heart and in the end my decision was un-emotional and had a successful outcome. I was able to put my personal feelings aside and take the right decision knowing full well that there would be animosity from the staff member after that. |

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| What was intended? | |
| Why did you act as you did in the incident? What did you intend to accomplish through your actions at the time? | I wanted to show the staff member that my approach to management has no room for favouritism and special treatment, that I treat all staff members equally and hold the company's interests above all else. |
| Why do you think others acted as they did in this incident, and what do you think they intended through their action? | In my opinion the staff member was trying to use favouritism and his "over familiarity" with me to coax me into promoting and appointing him to the new position. |
| As you look back on this incident, why do you think things happened the way they did? | I feel that a manager who treats his staff equally, does not act preferentially towards individuals and who always acts in the best interests of the company would have the same outcome. |
| What did you think and feel generally about the incident and others like these that happen in your work? | Managers will always be tested and what separates a manager from a leader is that a leader will always show fairness when it comes to staff. |
| What did you learn? | |
| What do you think you have learnt from your experience in this incident? | I have learnt that in order to succeed as a manager and a leader, one must never be persuaded or influenced in ones decisions if one knows that the decision about to be taken is in the best interests of the company and the employee for that matter. |
| As you look back on this incident, do you think you could have improved your performance or effectiveness? | Yes, I should not have allowed the staff member to become so familiarly friendly with me that made him feel that he had a shot at being promoted as a result. I should have maintained a more professional stance when I saw that he first became friendly with me. |
| What abilities and ideas were involved? | |
| How did ideas or concepts guide your actions in this incident? How were they used or applied in your actions? | My belief in putting the company's best interests first guided me during this incident. By doing so, I was able to realise that the staff member was in fact not suitable for the position as apposed to possible appointment because I like the individual. |
| What abilities or skills are needed to perform effectively in incidents like this? | As an effective manager and leader, one must always act professionally and ask the question: Is this action that I am about to take in the best interests of the company and the employee, before taking the decision to act. |
| Looking back on incidents like this one, what ideas or concepts seem to apply best now? | One standard for all staff, company comes first, don't act on impulse, but ensure that the decision is going to have a successful outcome. |
| INTERPRETATION: | <pre> graph TD A[Staff member is over friendly with line manager] --> B[Perception that friendship will ensure promotion] B --> C[Line manager observes over friendliness] C --> D[Checks this against good manager and leadership rules] D --> E[Action based on one standard and company interests at heart] E --> F[Decision taken not to appoint] F --> A </pre> |

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| EXPLANATION & WRITE-UP: | A staff member abuses his familiarity with his line manager with the ulterior motive of personal gain. The manager observes this and then compares the possible appointment of the staff member to the new position against management and leadership rules governing his decision making and decides to act upon the principle of one standard for all staff (no favouritism) and the decision must be in the best interests of the company. Hence, the decision is taken not to promote and appoint the individual to the new position. |
| PERSONAL REFLECTION: | As a leader I need to ensure that I do not sercome to the friendly advances of staff that may cloud my ability to make the right decision. Luckily I was able to identify the persons motives before the decision was taken to appoint. |

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