Project #2
Developing an Appropriate Research Treatment, Methodology, and Analysis

Introduction
Unishippers is a franchise organization with 284 locations across the US. In January 2004, the management team asked the franchisees to complete an extensive survey on each department within the corporate office to determine how well these departments are meeting the needs of the franchisees. Training and technology were among the lowest scoring departments in the survey. The management team at the corporate office speculates the reason for the low scores is a direct reflection of the failure in the deployment of UONE across the Unishippers franchise system.

In March 2003, UONE, a Customer Relationship Management solution, was to be deployed throughout the system. A training team comprised of eight of the “best and brightest” at the corporate offices would travel in teams of two to each location and train the entire office on how to use UONE in 2 ½ days.

The rollout was delayed until May, then June, then July. Finally, in September, the rollout began. Ten percent of the system received training on UONE when they had to halt the rollout due to stability problems. The rollout continued again in November, then stopped in December due to additional problems. To date, only 30% of the system are on UONE. Due to budget reasons (originally budgeted at $4 million, this project is now topping $6 million), the training has changed dramatically. Now, instead of flying the trainers to the office and training the entire staff, the management team is flying the franchisee and one other office person to the corporate office for two days of training conducted in the “perfect world” environment. When these two people return to their office, they are expected to train the rest of the staff and handle the “real world” difficulties that were not simulated in the “perfect world” environment. They are armed with only a training manual and the phone number to the UONE help line at the corporate office.

The net result is a crippled franchise system where multiple offices are unable to complete even the most rudimentary tasks – including sending out invoices, identifying a sales lead and providing price quotes to their customers. Many offices are flat-out refusing to migrate to UONE, even though the corporate office has mandated that each franchisee must use UONE.
The management team would like research conducted to determine how to increase the scores of the training department by improving the training of UONE.

**Problem Statement**
The results of the 2003 Unishippers Franchisee Confidence and Engagement Survey clearly show the current UONE training program is unsatisfactory; it is not meeting the needs of the franchisees.

**Research Question**
Would training franchisees at their location, rather than flying them to the corporate office and training them in a “perfect world,” increase the level of success in regards to UONE training?

**Hypothesis**
The original plan to train franchisees and their staff how to use UONE at their location will increase the level of satisfaction and adaptation of the program more than the revised plan to train the Franchisee in the “perfect world” environment found at the corporate offices.

**Variables**
This research will be comprised of both independent and dependent variables. We know that participant demographics will vary widely. Some are expert computer users, some extreme beginners; some are college educated, some didn’t complete high school. We are not controlling any of these variables and are assuming that a participant is a participant is a participant. Demographic information will be gathered in the survey conducted immediately following training. The results may show that some of the independent characteristics are important and additional research may be necessary to determine their true impact.

This research will utilize a treatment and control group. The treatment group will be those trained in their own office, the control group will be those trained at the corporate office. Each individual office has been given a detailed requirements document (See Appendix #1) of the technology needed to run UONE. Each Franchisee is responsible for complying with these requirements. The corporate office has successfully implemented and tested the technology required for UONE.
Independent variables are those differences that participants exhibit prior to testing. The controlled variables are

1. Demographics: we will assume that a participant is a participant is a participant.
2. Technology: we will assume the technology is the same at both sites, the data migrated successfully, and all other technical variables equalized.

Dependent variables are those introduced by the researcher for the study. For this research, the dependent variables are

1. Length of time it takes them to invoice their customers
2. Number of platinum sales opportunities closed
3. Length of time it takes to provide accurate price quotes to customers
4. Length of time it takes to provide accurate price quotes to potential customers
5. Training manual – will be the same for each group
6. Trainers – the same group of trainers will conduct training for both groups
7. Same interviewer for the telephonic survey conducted 30 days prior to their training
8. Phone calls to the UONE help line at corporate offices will me counted and recorded

Expected Outcomes
Franchisees who receive UONE training in their location will be able to

1. Invoice their customers faster than those trained at the corporate office; determined via a telephonic survey 30 days after their training (see Appendix #2).
2. Identify, act upon and close more of their platinum sales opportunities than those trained at the corporate office; determined by running a report in UONE 30 days after their training (see Appendix #3).
3. Provide accurate price quotes to customers faster than those trained at the corporate office; determined via a telephonic survey 30 days after their training (see Appendix #2).
4. Provide accurate price quotes to potential customers faster than those trained at the corporate office; determined via a telephonic survey 30 days after their training (see Appendix #2).

Improving these four tasks will result in an improved rating of the department during the next Franchisee Confidence and Engagement Survey.
Research Methods
This research will utilize a control group and a treatment group. The control group will be trained at the corporate office in an “ideal world” environment. The treatment group will be trained at their location on their equipment and their data. Each group will participate in
1. A survey immediately after their UONE training (see Appendix #4)
2. A telephonic survey 30 days after their training (see Appendix #2)
3. Calls to the UONE help line for their UONE questions (instead of calling a fellow franchisee) (see Appendix #5)

Design
Upon completion of the training, each group will complete a survey using a Likert rating scale to determine how effective the training was in serving their needs (see Appendix #4). They will also schedule a time for a telephonic interview 30 days later (see Appendix #2).

During the following 30 days, any call they place to the UONE help line will be counted and recorded (see Appendix #5). Questions asked will be noted and the number of times they needed to call to solve the original question, as well as solve a new question, will be tabulated.

Thirty days after their training, a report will be run in UONE to determine the number of platinum opportunities (opportunities for a monthly profit margin of $1,000 or more) closed (see Appendix #3). Then, a telephonic survey will be conducted in which the amount of time it takes them to invoice their customers will be noted. The interviewer will also ask the franchisee to perform a price quote for a current customer and a price quote for a new customer. The length of time it takes the franchisee to provide these quotes will be recorded (see Appendix #2).

The results of these surveys will be tabulated and reported to the Unishippers’ management team after 90 days (three separate test groups). Additional changes to UONE training will be made, if necessary, at that time.

Results
To ensure consistency, the Communications Program Manager will tabulate all results. Answers will be either correct or incorrect; no partially correct scores will be given. The data will be analyzed and the standard deviation, relevant correlations and a t test will be reported on.
Appendix #1
UONE System Requirements Forecast

The purpose of this document is to provide Franchises with initial information on the system requirements for UONE. This is a preliminary forecast and will be refined as we are able to complete performance testing.

UONE is a web application built on Siebel and Java technology. It will be accessed through Microsoft Internet Explorer over the Internet. This means that you will not have any software to install on your server or workstation. Also you will have very little to maintain on your PC in order to access it. Web applications typically do not require the installation of software. This is because they run entirely from servers at a remote site. However, UONE will run better with a faster workstation because some processing will be handled on your PC.

These are the technical requirements:

- PC running 2000 Windows Professional or Windows XP Professional
- Pentium III CPU (500 MHZ minimum, 750+ recommended)
- 256 MB SDRAM – Windows 2000, or 382 MB SDRAM – Windows XP
- 36 GB hard drive
- Video card
- 17” monitor (minimum)
- 10/100 Mb Network Card
- UPS
- Broadband Internet connection with a 56K modem as a backup
- Microsoft Internet Explorer 6.0 or higher
- Microsoft Word for communications
- Microsoft Excel for reporting
- Microsoft Outlook for email
- Printer

Because UONE is run entirely on a web server, any time you lose your Internet connection; you will lose connection to the UONE system. Having backup options for bandwidth is the key to success. The way to avoid this from happening, we recommend that you have two Internet connections that work in a cascade setup. Your local system technician should be able to help you set this up when the time comes. As a precaution, you might want to
start investigating in your area for someone to aid in this process. Also here is a hardware
device that can help you achieve this recommended setup

http://www.asante.com/products/routers/FR3004/index.html. It allows you to have your DSL
connection, and in the case the DSL connection fails it then dials out over the backup line to
establish an Internet connection.

Server and Network
Your server will not be utilized by UONE. This means that you no longer need to maintain a
high-end server at your franchise for Corporate provided applications. However, if you are
running any other types of applications from your server, just storing data on your server, or
using it for authentication, you will need to keep your server. The speed and type of network
will then be dictated by your needs and your other applications specifications. UONE will not be
sensitive to your network performance speed the way UCMS is. For most franchises, peer to
peer networking will be suitable for routine requirements.
Appendix #2
UONE Training Survey #2

Directions: Call the Franchisee 30 calendar days after the last day of their UONE training. Use the stop watch provided to record the length of time (whole numbers only, minutes and seconds) it takes the Franchisee to complete each task. DO NOT OFFER ANY ASSISTANCE. If the Franchisee is unable to complete the task, please note it in the Comments section. Do not record whether the answer was accurate, the Communications Program Manager will determine that information. Record your finding in the space provided for each question and then return the survey to the Communications Program Manager when you are finished. Thank you!

Name of Surveyor:
Name of Franchisee:
Name of Franchise:
Date of Training:

1. Run an invoice report on all your customers who have shipped in the last two weeks.
   Record time: _ _:_ _
   Comments:

2. I’m a platinum customer. I’d like to ship an overnight express envelope from Boston, MA, 02451, to Madrid, Spain. How much will that cost?
   Cost: ______
   Time: _ _:_ _
   Was cost accurate (circle): Yes  No
   Comments:

3. I’m a new customer. I’d like to ship a 5 lb. express package from Salt Lake City, UT, 84107 to Safety Harbor, FL, 34695 to be delivered next day by 3pm. How much will that cost?
   Cost: ______
   Time: _ _:_ _
   Was cost accurate (circle): Yes  No
   Comments:
Appendix #3
How to Run UONE Platinum Opportunities Report

Directions: The Communications Program Manager will run this report 30 calendar days after the last day of their UONE training session for each franchise.

Name of Surveyor:  
Name of Franchisee:  
Name of Franchise:  
Date of Training:  

1. Log into UONE as the Franchisee  
2. Click on Opportunities in the Parent View  
3. Select 1-Platinum Opportunities from the Query drop down  
4. In the left-hand menu drop-down, select Refine Query  
5. In the Ship Date field, enter >30

Total number of closed platinum opportunities closed in the past 30 days: _______
Appendix #4
UONE Training Survey

Directions: This survey is to be included in the UONE training manual. Upon completion of UONE training, the Franchisee is to complete this form and turn it in to the trainer. The trainer will turn in all forms to the Communications Program Manager.

UONE Training Survey

Thank you for investing your time, talent and energy in attending this training program. Please help us continue to modify this program to make it even more effective for your fellow Franchisees, Rainmakers, and Customer Keepers by completing the following survey. We greatly appreciate your participation.

__________________________

Trainer(s):
Location:

1. What is your position with Unishippers?
   - Franchisee
   - Rainmaker
   - Customer Keeper
   - Billing
   - Office Manager
   - Other, ______________________

2. What is the highest level of education you completed?
   - High School
   - Undergraduate degree
   - Graduate degree
   - Ph.D.

3. How would you rate your computer skills in general?
   - Excellent
   - Good
   - Satisfactory
   - Poor

4. Overall, how useful was the UONE training program?
   - Excellent
   - Good
   - Satisfactory
   - Poor

5. How comfortable are you with UONE’s functionality?
   - Very comfortable
   - Comfortable
   - Neither comfortable
   - Uncomfortable or uncomfortable

6. How comfortable are you with UONE’s navigation?
   - Very comfortable
   - Comfortable
   - Neither comfortable
   - Uncomfortable or uncomfortable

7. How comfortable are you with UONE’s processes and procedures?
   - Very comfortable
   - Comfortable
   - Neither comfortable
   - Uncomfortable or uncomfortable

8. Do you believe UONE will benefit your franchise?
   - Yes
   - No

9. Do you believe UONE will benefit your customers?
   - Yes
   - No
10. Did you understand the UPlan / USave processes prior to attending this training program?
   ☐ Yes    ☐ No

11. Do you understand the UPlan / USave processes now?
   ☐ Yes    ☐ No

12. What was the most helpful part of this training program?

13. What was the least helpful part of this training program?

14. Was there a topic or function that we should have spent more time on?
   ☐ Yes, _________________    ☐ No

15. Was there a topic or function that we didn’t train on that you would like to learn more about?
   ☐ Yes, _________________    ☐ No

16. Was the length of the training adequate?
   ☐ Yes    ☐ No, it should have been shorter    ☐ No, it should have been longer

17. Rate your trainers’ overall ...
   Knowledge of UONE                  Excellent    Good    Satisfactory    Poor
   Knowledge of the industry          Excellent    Good    Satisfactory    Poor
   Professionalism                    Excellent    Good    Satisfactory    Poor
   Ability to keep your attention     Excellent    Good    Satisfactory    Poor
Appendix #5
UONE Training Calls Received

**Directions:** Record all incoming calls regarding UONE questions, comments, or concerns from each Franchise (regardless of who is calling). Complete the required information in each column for each call. Use your caller ID/call length feature on your phone to record the length of the call. Return this document to the Communications Program Manager when you are finished. Thank you!

Call Log for Franchise:

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<th>Date</th>
<th>Caller Name &amp; Title</th>
<th>Question</th>
<th>Length of Call (minutes and seconds)</th>
<th>Was question resolved by end of call? Y/N</th>
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