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 now 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 the most rudimentary tasks – including sending out invoices, identifying a sales lead and provide 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**
Training franchisees and their staff how to use UONE at their location will increase the level of satisfaction and adaptation of the program more than training the Franchisee at corporate’s “perfect world” environment.

**Variables**
This research will be comprised of both independent and dependent variables. We assume that a participant is a participant. Demographic information will be gathered in the survey conducted immediately following training, but additional research may be necessary to determine the true impact of demographics.

1. **Independent variables** are those that are observed, changed or manipulated systematically by the researcher. The controlled variables are
   a. Type of training: corporate office vs. individual location
   b. Technology: we will assume the technology is the same at both sites, the data migrated successfully, and all other technical variables equalized.

2. **Dependent variables** are those by which the outcomes of a study are judged. For this research, the dependent variables are
   a. Length of time it takes them to invoice their customers
   b. Number of platinum sales opportunities closed
   c. Length of time it takes to provide accurate price quotes to customers
   d. Length of time it takes to provide accurate price quotes to potential customers
   e. Training manual – will be the same for each group
f. Trainers – the same group of trainers will conduct training for both groups

g. Same interviewer for the telephonic survey conducted 30 days prior to their training

h. 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.

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.

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.

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.

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

2. A telephonic survey 30 days after their training

3. Calls to the UONE help line for their UONE questions (instead of calling a fellow franchisee)

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. They will also schedule a time for a telephonic interview 30 days later.

During the following 30 days, any call they place to the UONE help line with be counted and recorded. 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. 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.

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