Details before, during and after each elicitation technique

Interview
Preparation checklist

Decide which type of interview
We have decided to do a traditional face to face interview. This was decided because it is necessary to see the physical work environment and processes that happen in their day to day business

Decide on interview goal
The goal of our interview was to interview the staff in order to find out what business problems they experience on a day to day basis in order to determine how we can improve these problems

Create list of questions
We have created a predefined list of questions to ask the client. This serves as a general basis to work from but it also provides the opportunity to expand further to identify the actual problem instead of a symptom to the problem. The predefined list is as follows:

Questions to be asked to the client

1. What is your role in the organization
2. How does the rental process work?
3. How are appointments handled
4. How does the payment process work? Pay when the suit is returned, pay deposit, pay upfront?
5. Is there a problem with suits not being returned? What happens in such cases?
    a. Why does this happen?
6. Explain the condition of the suits upon return? How is that remedied?
7. When someone books a suit and it is not available for the rest of the customers, but the suit never ends up being booked, does this affect your business and happen allot?
    a. Will a notification system help with this problem?
8. How does your current system work
9. How are tailor made suits handled?
10. What devices should the program be able to run on?
11. Is your current online catalog up to date? Does a customer wish to buy a suit but it is out of season?
12. Is there normally a popular style
13. Is there inventory system, How is inventory documented at this stage?
14. How does your bookings for fitments work
15. What is the most iterative task that needs to be completed?

Identify potential interviewees
We have identified our potential interviewees as Annemarie(the owner) and June(the manager). The questions stated above will be asked to them both.

Decide on location for interview
We have decided that the location of the interview must be held in the physical Smart Guy Store to ensure that each member grasps the business processes that take place on a day to day basis.

Invite interviewees
The interviewees that are taking place in this interview are: Olive Cindzi, Werner Schutte, Leon Combrink and Jason van der Merwe. Invites were sent out using whatsapp as a form of communication

During Elicitation checklist
Describe purpose of interview
The purpose of this interview was to get an in-depth understanding of the clients day to day business operations to ensure that we identify all the problems in their company. This will enable us to build a system that will bridge the gaps that we have identified in their business

Confirm interviewees' roles
Our overall goal was to identify all of the issues and gaps within their current system and to give a detailed explanation of all of the functions within the system.

Jason was tasked to ask the interview questions to each of the two staff members in the business as well as documenting their responses amd branching off their answers to answer more detail oriented questions.

Leon was tasked with using the answers to the questions in order to complete our interview questions as well as keeping track of their responses and asking further detail oriented questions

Olive and Werner were tasked with assisting in documenting questions to ensure no response was missed as well as documenting further answers that need further clarification or that need to be elaborated in order to find their business problem

Address any concerns
The concerns that we have with the business is that when suits come back damaged, the client never pays the rest of the money owed to the business for purchasing a suit on a payment plan and that June sometimes experiences difficulty in making contact with these customers. This results in purchased materials for the client that will not be used since the client does not inform the business of their decision. This was indicated as a tremendous

waste of time by both interviewed parties and it results in most of their problems. There are some remedies for clients in certain cases but most of the time they are forced to compromise. Another problem area is that their system is roughly 90% paper based (only their current sage pastel system that handles their bookkeeping is digitised). This can lead to human error and erroneous errors that can negatively impact the business eg: urgent materials procurement, time consuming process to find a previous client.

Explain how information will be recorded and shared
Information is recorded and shared by using a voice recording (after permission was obtained from the interviewed party) and notes made during the interview. After the interview the recording will be replayed in order to document the client's responses word for word on a google docs document that will be shared with the whole group

Ask predefined questions
Our predefined questions were asked and we elaborate where we felt necessary. Their response were recorded as follows:

1. **Q: What is your role in the organization**
    a. June: "I manage the store, I do basic admin regarding clients, fittings, information, I do full and final fitment along with measurements, I ensure all the tailors get their work done, I do the stores stock take and keep the store in a good condition"
    b. Annemarie: " I basically work around the entire shop but most of my time goes to managing my staff and doing admin as well as financials"
2. **Q: How does the rental process work?**
    a. June: "We book an appointment with a customer or the customer walks in the store. We take information like the client's name, surname and email address. We then find out when the function is, what color he wants, should it be custom, a rental or a purchased suit. If it is a purchased suit we will phone the suppliers to source that specific suit. They give us information on if they have stock or not. If they do not we normally opt for a custom made suit. If that is chosen we will make the date for preliminary and final fitment which is normally 1 week before your function since you do not change much in that time period. The same applies if you purchase a suit. Once the purchased suit arrives nothing fits perfectly. We then pin it according to what the customer wants. It then gets altered and we do a final fitting where the customer wears the whole suit with all its accessories. If there are small adjustments we make them and normally tell them your suit will be available within 4 days which applies to purchased and rented suits. We also do second hand suits at less price than new suits"
3. **Q: How are appointments handled**
    a. June: "Our contact details can be found from our website, we normally get emails with clients telephone numbers with it, we will then phone and book it. SInce

some people can not phone from work because they work in a loud environment like a call center or school we will make contact through whatsapp."

4. **When renting out your suits, since Annemarie said that she wants a rental system integrated with your current system, how does the payment process work? Pay when the suit is returned, pay deposit, pay upfront?**
    a. When a customer comes in in May and the wedding is in November for example, We do the fitment of the whole group or single person, we do a quotation, which you can accept or decline. Once you accept they pay a 50% deposit. If you do it like that we just update our invoice. When they come to do a final fitting they complete a rental form. We have a basic computer where we can fill in their name, surname, telephone number and email. We fill in the color suit that they take, shirt, tie etc manually with the price that is updated automatically. Some pay the full amount and some pay the deposit.
5. **Is there a problem with suits not being returned? What happens in such cases?Why does this happen?**
    a. June :"Not really returned at all, we had one guy that said we will do a payment plan when he changed his rental suit to a payment plan. He never returned the suit and we did not receive the money. It does happen but not often. We also have miscommunication, like when the groom goes on honeymoon, he puts one of the groomsman on to return the stuff, he forgets about it. We have to whatsapp the group on his honeymoon for the details of the person responsible for returning the suits so that we can make contact with him. Then the groom does not get his deposit back and we charge 10% for each day that it is late."
6. **Explain the condition of the suits upon return? How is that remedied?**
    a. June: "When it is damaged we take credit card particulars in the contract, or a R220 cash deposit. It does not cover the basic damage but we will hold on to that and we will send them an invoice to state their replacement cost. We will deduct the R220 cash deposit from that figure and the net amount will become the outstanding amount. If the suit is damaged beyond repair they will need to pay the full amount of buying the suit. We wont charge any amount above the cost."
7. **When someone books a suit and it is not available for the rest of the customers, but the suit never ends up being booked, does this affect your business and happen a lot?**
    a. June: "When they do final fitting the amount is due of the suit which is a week before the function. If they do not pitch we still phone them to find out if they are still interested, when they will come and do their fitment but We do have suppliers and another store. First off we find out from the other store if they have stock. If they have the pants for example we will get the jacket from the suppliers. It depends on when they have it. If a customer for example needs to have his suit back on Wednesday and the other customer wants the suit the Friday or Saturday we can still dryclean it in a day's time. If it is on the same day we can offer the customer more or less the same suit and we will ask the price of the one you wanted if this one is more expensive to compromise."

b. Annemarie: “This does not really happen since we use the rental system visio, which was primarily developed for costume companies. This does however cause mistakes in our inventory but we normally stay on top of it. Since we have two shops we can always courier the missing garment from our Potchefstroom shop. We then although leave them without this stock and we always need to call to find out if they have that specific garment on hand. It would be nice to know on a system if the other shop has stock of the garment through a few clicks. IT will also allow us to track our logistics between stores”

8. **When calling a customer, how do you store client information?**
   a. June: “We have a book with the names in. On a monday I will check, since we send out quotations, if they did not reply within 7 working days I will whatsapp them, phone them etc to find out if they are still interested. If they said no I will ask them why and take them out of the book and quotation.”
9. **Do you have to search for the customer manually?**
   a. June: “Yes everything is manual and paper based in the book. You must have a brain of steel to remember all of the information”
10. **You talk about payment plan, what do you use as security that they actually pay.**
    a. June: “The suit is only reserved when a certain amount is paid”
11. **Have you had an instance where a person does not pay the other 50%. Does someone need to co-sign?**
    a. June: “We have a guy who paid and bought a suit at a china mall but then wanted his money back. Unfortunately he could not be refunded because he signed the contract as stated. We always tell the contract to read their contract. The customer normally has 7-14 days to cancel. If you don't cancel and it's in the 14-25 days period we give x amount back. And from thereon we charge admin fee. No, we do not have someone that co-signs.”
12. **How does your current system work**
    a. June: See appendix a:Client rental form and client measurement form and client customer details form. We store the customer's name, surname, cellphone number, email address and the date of the function. We include a sample of material which is stapled to the form. We take down any notes, measurements. We scratch onto surfaces what dress they want and if they have a picture we print it out and stick it to the form. We do have a PC where we process payments. Each of the employees can login to thi system with their username and password.see appendix A: Client current system
    b. Annemarie: “Well I personally use Zoho for finance, quotes and invoices. It allows a customer to accept or decline a quote. IF they accept it is automatically converted into an invoice. It does not however recognise payments or make payments. We manually need to check our online banking for the money that has been received or make payments when it s needed. We also use rental system Visio like I previously mentioned. THis keeps track of all of our physical garments like jackets, pants etc.”

13. **What do you do with the books when they get full**
    a. June: “We print a new one from the printing place near us. Annemarie does that.We do keep the records since we get clients that hired a suit previously but he wants the same one for himself. Then we go back to his form manually to see what he rented.It goes a few years back and we store it in our store room”
14. **With suppliers, do you have one for shirts, pants and jackets or are they different suppliers for each?**
    a. June: “We have different suppliers for each category. Our suit supplier is from Durban and one in Johannesburg, our shirt supplier is also from Durban. We also import our European styled suits from Turkey.”
15. **How are tailor made suits handled?**
    a. June: “It is logged in a book” (as seen in appendix A)
16. **What devices should the program be able to run on?**
    a. June: “I am used to doing everything manually, but I worked with a company in cape town where you scan the code with a handheld scanner but people tend to cut off labels. It would be nice if it can be scanned on the floor and it updates on the system since we hand write each label and we need to remember stock by heart. You can scan each barcode these days on the phone.”
    b. **Is your current online catalog up to date?**
    June: “We normally update it when new stock comes in but our standard, best selling items won't change like tuxedos and black suits. It does happen when a customer wants a suit, especially our european styled suits, where it is out of stock where a customer wants it. We then custom make suits based on their measurements”
17. **Is there normally a popular style**
    a. June: “Tuxedos and black suits, navy suits and gray suits.”
18. **Is there an inventory system, How is inventory documented at this stage?**
    a. **June: “**There is no documentation at this stage for that. We need to go into the store room and check physically. We will bring out the material, check how much meters are left and we write that down. We will then decide if we need to buy more. This Includes cottons and needles. This is only written down on our white board. Stock takes are taken down on a daily basis. If we need a material urgently Annemarie must go and buy it. We normally wait for the order and then go and check if we have that material in the store room. We do have booklets for custom made suits that indicate the material used but it is not necessarily on hand in our store.”
    b. Annemarie: “Like June said there is no documentation. But it is hard for us to do this since we need to inspect each roll of material because there can be shades that differ from one another and the colors can fade with age”
19. **Does urgent material need business delays?**
    a. June: “Sometimes but we will always have a plan- B”
    b. Annemarie: “Yes it does in terms of time and finances”

20. **What is the most iterative task that needs to be completed?**
    a. June: “The follow ups are the most. It takes a lot of time and people often forget. It causes issues like someone says she wants something, we order the material but she has already found something else. This wastes our time.”
    b. Annemarie: “This will be follow ups with clients because it wastes our time if we go and purchase the materials and the client does not show up”
21. **Would you consider a reminder system?**
    a. Annemarie: “Yes that would be great! Although since customers ignore emails and whatsapps we would prefer to call them to be certain of their decision. If it is possible I would prefer that a reminder is sent to our staff that they need to call them”
22. **Would you consider a scanning system on the floor of the shop?**
    a. Annemarie: “ No, we have thought about this but we do not have the capacity for the amount of items that need to be scanned like Checkers for example.”

Summarize the session

We were able to identify the main problems in their system by talking to June (the manager) and Annemerie (the owner). Their core problem was that most of their details were stored on a paper based system that makes it hard to track customers previous records as well as the stock that is available in both of their shops as well as customers not informing them of their decisions which result in follow ups and the unnecessary wastage of time. The client would like to digitize the business in order to make it easier for all of the employees and to work more efficiently and effectively. Customer payments are a problem in the sense of not being able to obtain the amount that the business is owed but the client system and notifications will help to mitigate that. There is a current possibility for human error.

After Elicitation checklist

Organize information

The information has been organized in a question and answer basis as stated above

Confirm results with interviewees

The results have been confirmed with the interviewees and both Annemarie and June have confirmed that they are happy with our interpretation of their business problems

Share information with stakeholders

Information has been shared to Asana as well as google drive for easy access to all the team members and relevant stakeholders

Schedule follow-up interview if needed

Our first interview was held on 2022/05/23 with June and on 2022/05/24 with Annemarie but it was compiled and organised into one single section.

Brainstorming
Preparation checklist
Define area of interest
We have defined the area of interest to be finding a final solution to the problems of SMart guy’s business issues

Define time limit
We have set a time limit of one hour in order to keep the motivation and participation high while not dwelling into grey areas

Identify participants
Our participants contributing to the brainstorming session will be:
- Jason van der Merwe
- Leandra Perumal
- Olive Cindzi
- Werner Schutte
- Leon Combrinck

Identify facilitator
The facilitator for this session will be leon Combrinck who enforced the rules and motivation for the particular session

Invite participants
All participants were invited through whatsapp by sharing a google meet link which is where the session was held

Invite facilitator
The facilitator was invited through whatsapp by sharing a google meet link which is where the session was held

Meet with participants to explain expectations
We have met with the participants to explain that we need to find a final solution to the clients business problem.

Establish evaluation criteria
We have set the evaluation criteria for each aspect of the project to be evaluated against. This criteria was defined as
1. Does this make the business easier to manage?
2. Does the idea fall within the desired time to implementation?
3. Does the idea fall within the scope of the budget?
4. Does the idea contribute to the improvement of the business issue?

Book venue/meeting room
We have booked the venue for the brainstorming session to be google meet in order to accommodate every team member

During Elicitation checklist

Share new ideas
Each team member contributed in order for us to come up with new ideas that can be implemented into the client’s system. The new ideas were as follows:

- **Using sql to create a database that record stock levels**
- **Creating a Xero Like Payment system**
- **Creating a customer database for easy record keeping elimination the laborious task of paging through old books**
- **Create a notification system to notify the staff after a set period of time that they should call a customer who has not replied yet.**
- **Create an employee database**
- **Add an online booking system**
- **Create notification for the staff to remind the customers to come pickup their order.**
- **Modifying the contract to include so they can sign surety so if the customer does not pitch they have another person to fall back on.**
- **Create a financial report system.**
- **Adding a supplier database**

Record all ideas
All ideas are continuously recorded on google docs and saved in google drive in order to be compiled into a final document

Build on ideas

- Using sql to create a database that shares and integrate stock levels between both branches. This is updated continuously and shared to the cloud to ensure that each of the companies have access to the stock levels of both stores. Items can be identified per store
- Create a xero like system for payment- related activities like buying stock as well as a customer receipts system where customer payments are recorded. The invoices created through Anova are uploaded to this system
- Integrating customer database using customer information from both stores to eliminate manual book keeping of the customers information.(centralizing the 2 stores customer list). THis allows the staff to easily track the sales per customer to easily identify previous sales eliminating any staff member from the task of paging through a paper based book

- Create a notification system to notify the staff after a set period of time(7days) that they should call a customer who has not replied yet. These notifications will help to eliminate the error of a staff member forgetting to call a customer
- Create an employee database with their own login details and personal information where only the owner can access employee details. This system will log details like who works on what day or who handled a specific client.
- Add an online booking system that allows customers to log themselves as a customer on the system of Smart Guy. They will be able to book fitment appointments online that eliminates the need to call the business. This will create time for follow ups
- Create notification for the staff to remind the customers to come pick up their order. Once the staff has called the customer they can agree on a final fitting appointment which can be booked afterwards on their new system by the relevant staff member.
- Modifying the contract to include so they can sign surety so if the customer does not pitch they have another person to fall back on. Information can be stored of the party that signs as surety in order to contact them if a initial customer defaults on his/her payment.
- Create a financial report system. This will help the owner to track their finances since they have some issues with it. They can make business decisions based on the generated information n order to improve their business
- Adding a supplier database to keep track of stock coming from the suppliers, to which store it is supplied to and the garments that are supplied to each of the stores.

Elicit as many ideas as possible
Each group member has elicited as many ideas as possible until there were physically no more ideas to be generated

After Elicitation checklist
Discuss and evaluate ideas

Each of the ideas were discussed and evaluated against the criteria that we have stipulated. The ideas were evaluated as follows:

Idea	**1: Does this make the business easier to manage?**	**2: Does the idea fall within the desired time to implementation?**	**3: Does the idea fall within the scope of the budget?**	**4: Does the idea contribute to the improvement of the business issue?**
• **1. using sql to create a database that Keeps track of inventory, clients, suppliers and employees for both stores**	Yes	Yes	Yes	Yes
• **2. Create a xero like system for payment-related to buying stock as well as customers paying for their orders.**	Yes	Yes	Yes	Yes
• **4. create a notification system to notify the staff after a set period of time(7days) that they**	Yes	Yes	Yes	Yes

should call a customer who has not replied yet.				
• **6. Add an online booking system**	Yes	Yes	Yes	Yes
• **7. Create notification for the staff to remind the customers to come pickup their order. Once the staff has called the customer they can agree on a final fitting appointment.**	Yes	Yes	Yes	Yes
• **8. modifying the contract to include so they can sign surety so if the customer does not pitch they have**	Yes	Yes	Yes	Yes

another person to fall back on.				
• **9. Create a financial report system**	Yes	Yes	Yes	Yes

All of the ideas passed our evaluation criteria, thus all of the ideas will be used in the creation of the new system

Create list of ideas

We have compiled a list of ideas after the completin of our evaluation.
Our final list of ideas is as follows:

- **Using sql to create a database that record stock levels**
- **Creating a Xero Like Payment system**
- **Creating a customer database for easy record keeping elimination the laborious task of paging through old books**
- **Create a notification system to notify the staff after a set period of time that they should call a customer who has not replied yet.**
- **Create an employee database**
- **Add an online booking system**
- **Create notification for the staff to remind the customers to come pickup their order.**
- **Modifying the contract to include so they can sign surety so if the customer does not pitch they have another person to fall back on.**
- **Create a financial report system.**
- **Adding a supplier database**

Rate ideas
We have rated our ideas on importance on a scale of 1-10 as stated below:

Idea	Rating
• **1. using sql to create a database that Keeps track of inventory, clients, suppliers and employees for both stores**	10
• **2. Create a xero like system for payment- related to buying stock as well as customers paying for their orders.**	7
• **4. create a notification system to notify the staff after a set period of time(7days) that they should call a customer**	9
• **6. Add an online booking system**	6
• **7. Create notification for the staff to remind the customers to come pickup their order. Once the staff has called the customer they can agree on a final fitting appointment.**	9
• **8. modifying the contract to include so they can sign surety so if the customer does not pitch they have another person to**	8
• **9. Create a financial report system**	9

Distribute final list of ideas
The final list of ideas are distributed using google drive to enable each team member and relevant stakeholder to access the document at any time when needed

Schedule follow-up if needed
No follow up interview was needed