Interview

**CEO**: Interviewing the CEO is critical to understanding what reports and system outputs are necessary for making broad decisions concerning the entire company moving into the future. It is also important to understand the company’s goals in terms of productivity and revenue to ensure that the proposed system will be able to meet these demands. Consideration for the frequency that upper level management accesses the current system should also be made to be sure that the proposed system will focus primarily on those who will use it often. Using a pyramid structure for this interview will allow the CEO to start off with some of the more specific details about his interaction with the current system, and then broaden out to how that interaction affects his duties as the CEO. The interview will conclude with very open-ended questions concerning what the CEO views as the main goals for the company, and if they view a change to the current system as a positive that will allow the company to better reach those goals.

* How long have you been working with the current process system?
* How often do you review reports produced by the current system?
* Who else in upper management positions also looks at these reports that is involved in the decision-making process?
* What information is presented in those reports?
* How is the information presented in those reports?
* How does the information in the reports help you to make decisions about the direction of the company?
* What do you view as the main goals for the company?
* Do you see any room for improvement in the current system that would assist in the decision-making process and in helping the company reach those goals?

**Analyst/Forecaster**: Understanding the needs of the analysts and forecasters will further ensure that the proposed system will meet data requirements that allow for the accurate prediction of expected completion dates for future contracts based on historic data. It will be important to know how often these employees review this data to make their predictions, what kinds of information they use to reach conclusions, as well as how far into the past they look when making their predictions for future completion dates. By utilizing a diamond pattern for the structure of this interview, the analyst or forecaster will be able to describe the specific nature of their position, as well as how often they are required to access the system to obtain information critical to fulfilling their duties. In the middle of the interview, the interviewee will have the opportunity to explain what kinds of data they collect, how this data helps them make decisions, as well as how this data helps the company as a whole, and if they see any room for improvement in the current system that would make their job easier. The interview will conclude with questions about how far forward and backward these individuals must look to ensure that the system will be able to support all the necessary data in the given time frame.

* What are your responsibilities as a forecaster/analyst?
* How often do you access the system for information to aid you in fulfilling those responsibilities?
* What kinds of information do you collect when using the system?
* How does this data help you when making predictions?
* Do you think the current system could be improved in any way to make the collection of data easier and clearer?
* Do you think the current system could be improved in any way to make the synthesis of your predictions easier?
* How does the forecasting and analysis process help the company to meet its productivity goals?
* How far back do you look when collecting historic data to make future projections?
* How far into the future do you make projections?

**Supervisors**: Understanding the requirements of the supervisors is critical because they are responsible for tracking each order’s progress through the production process and editing expected completion dates if problems arise. Supervisors must be able to address any day to day problems that slow down the production process, as well as interact with individual machine operators on a daily basis. It will be extremely important to understand how the supervisors keep track of each order using the current system, as well as if there are ways to streamline the process and make it easier to track down any orders of concern. The methods used by supervisors to update estimated completion dates for each order should also be analyzed so that the proposed system will be able to easily accommodate these entries. As with the analyst and forecaster interview, a diamond shape interview structure will allow the interviewee to begin with specific answers before broadening out and then concluding with more specific responses. First, the interviewee will be able to describe some of the common issues that affect orders, as well as how often those issues occur and how they account for these issues. Open ended questions about the current system will then provide the interviewee with the opportunity to address any concerns with the current system as they pertain to the ability to address issues as they arise. A few closed ended questions will then be asked about who the supervisor must give any updated information to, and what kinds of information they must provide. By addressing the interconnectedness between supervisors and other employees, such as analysts, the system will be able to include functions that allow this reporting process to be more streamlined and accurate.

* How frequently do orders fall behind?
* What are the most common reasons that orders fall behind?
* How do you track down orders of concern using the current system?
* How frequently do you have to access the system when you are trying to locate an order of concern?
* How do you update the estimated completion date of an order that has fallen behind?
* Do you view the current system as one of the issues when it comes to orders that have fallen behind?
* Do you believe that a change to the current system would allow you to more easily locate orders that have fallen behind?
  + Or prevent them from falling behind in the first place?
  + If so, what changes would you recommend?
* Do you believe that a change to the system would allow you to more easily update the estimated completion date of orders?
  + If so, what change would you recommend?
* When the estimated completion date is updated, who needs to know about it?
* Does the current system allow those that need to see that change to do so easily?
* Is there anything else that these individuals require from you to perform their jobs?

**IT**: The in-house IT department will be responsible for maintaining the proposed system once it is installed, and will also be responsible for training employees on its functions and proper usage. The IT department will be able to explain the current infrastructure of the system, as well as any additional resources they believe they may require for supporting the transition to a new system. It will also be important to understand the company’s fair use and security policies to be sure that the new system conforms to these requirements. This interview focuses primarily on close ended questions to be sure that the system will be able to meet company standards, and that it will have the proper technological support to ensure that it is maintained and used once it’s installed.

* What are the company’s policies regarding fair use and security of technological infrastructure?
* What kinds of responsibilities does the IT department have?
* How much time is devoted to maintaining the current technology?
* How much time is devoted to training new employees on the usage of the technology?
* What kinds of technological infrastructure does the company currently have?
* If a new system were to be installed, what additional resources would the IT department need to ensure that the system runs properly?
* What resources would be needed to ensure that employees are trained to use the new system properly and appropriately?
* How much time, approximately, would the IT department need to implement the change to a new system?
* How much time, approximately, would the IT department need to properly train employees on the proper usage of the new system?

**Questionnaire**

The questionnaire will be distributed to all machine operators as a paper copy at the beginning of their shift. Employees will be able to submit their completed forms by depositing them in a central box located at the center of the facility. While the opinions of the operators are critical to the design of the new system in terms of the interface and functionality, it is not practical to conduct several hundred interviews, and so a questionnaire is a more reasonable option in this situation. Employees should be asked about how often they interact with the current system, as well as the extent to which its error prone nature disrupts their ability to perform their duties. The questionnaire will also provide open ended questions for the employees to submit any opinions on what functionalities the new system should provide and how they would like the new system to be laid out to encourage ease of use, if they believe a new system should be installed in the first place.

**Electrical Components Company is considering the development of a new process system that would streamline the production process and reduce errors, and would like your opinions. Please complete this questionnaire and submit it at the box located at the center of the facility. Thank you for your time and opinions.**

1. How many times do you interact with the current system per day? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. Is the current system dependable? Yes No
3. Does the current system interrupt your ability to perform your job? Yes No
4. If you answered yes to question #3, please explain.

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1. What suggestions do you have for the new system that would make your job easier?

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**Additional Techniques**

In addition to the administration of interviews and questionnaires to the employees in a stratified manner, the analysis of contract documents, performance reports, emails, and additional documents including handbooks and signs will be critical to ensuring that the proposed system will function appropriately. Documents should be collected in a cluster manner to ensure that an appropriate group of documents is selected, and that these documents represent what is available throughout the facility. Observation of various personnel throughout the facility should also be conducted to ensure that the roles and duties of employees are understood, and that the relationships between these individuals and the data they require to perform their jobs are properly considered.

Quantitative documents such as contract paperwork, forecasting reports, production reports, and performance reports will need to be examined to ensure that the system will provide the proper output for each of its users. These documents, contract paperwork in particular, will also be used to determine if the system will be able to automate any of the input to reduce error and increase the accuracy of output, or if the forms should be redesigned to improve the clarity of each report. The flow of each document around the facility should also be noted to ensure that the proper employees are able to access the information they need in a timely manner and that any unnecessary forms are eliminated to improve the usability and productivity of the system.

Qualitative documents, including email, posters, and policy handbooks, will also be important to consider when developing the system. Emails and posters will illustrate the culture of the company and what values are the most critical. The new system should reflect the overall company culture to improve its effectiveness and usability, and its output should lend itself to the values that the company finds to be the most important. Policy handbooks will also be important documents to study in that they detail what behaviors, both for employees and any systems used by the employees, are permissible. The system must be able to conform to the standards of the company, such as fair use and privacy policies, if it is to be accepted for use by the company.

Observation of a forecaster, a supervisor, and a machine operator should also be conducted to gain insight into how employees interact with one another and with the current system. Observation will provide an opportunity to see what pieces of information are used most often when making decisions and how that data is used to make those decisions. Observation of employees and how they conduct themselves on a daily basis will be important when deciding how to create the system in a way that will easily provide the information that each individual requires, thereby increasing their productivity and effectiveness, while also conforming to the standards and culture of the work environment.