

**The critical success factors needed to successfully
implement a stores communication portal in a nationally
represented retailer**

Christopher Peter Brikkels

Dissertation presented in partial fulfillment
of the requirements for the Degree of
Magister Technologiae (Business Administration)

Cape Peninsula University of Technology
2009

Supervisor: Dr Myles Wakeham

DECLARATION

I, Christopher Brikkels do hereby declare that this research study is my own original work and that all sources have been accurately reported and acknowledged and that this document has not previously in its entirety or in part been submitted at any university in order to obtain an academic qualification.

Christopher Brikkels

June 2010

ACKNOWLEDGEMENTS

I would like to thank the following individuals who assisted me in finally completing this research study:

- Dr Myles Wakeham for the patience and pragmatic guidance provided and for also understanding that I had conflicting priorities when it came to work and study commitments.
- The Woolworths leadership who continued to support me on this journey.
- To my wife Jillian who encouraged me from the start of my studies to the completion of this research report.
- To my son Noah who I hope to spend a lot more time with.

And most importantly to God, who has given me the opportunity to a part of something greater, not only with regards to my studies but to share my experiences with loved ones who wish me to succeed.

Abstract

The researcher is an IT business manager for Woolworths Pty Ltd and manages franchise and back-office applications. Contained in the back-office systems environment is a competency area called Store Productivity, which has to implement tools and technology to assist with the creation of a more effective "store environment".

The researcher was tasked with implementing a web-based store portal that would facilitate store communications and automated task management for such stores. The findings from this research study will allow for reflection against the set Head Office business requirements as well as end user expectations and subsequently provide an opportunity to process alternate courses of action or solutions for future releases or upgrades of such applications if required.

The researcher pursued a hybrid research approach that was both participatory and evaluative in nature. The reason taken for this approach was that research presents a unique opportunity to assess the criteria against a predetermined "super user group" as well as the eventual intended users being store and divisional managers. The "super user group" was defined as the group of key individuals that understand current and future business processes very well. They will also be involved in the design of the new solution and will provide critical feedback to the overall project. The view around what user requirements were, have been taken into account and a quantitative component was used to assess whether the original view taken had been met. It is believed that the sample and findings is representative of the targeted population of users of the system. This is further examined in chapters three and four of this study.

Effective mitigation of risks inherent in implementing a new technology is vital to the success thereof. The implementation considerations validated through the research conducted were to highlight the critical success factors for the Woolworths implementation and provide recommendations for future releases. These recommendations are contrasted with best practice models in communication, project management and systems development.

The findings generated from the research process suggest that business communication and broader business engagement commence immediately at the point of business case formulation, thereby creating awareness and should continue throughout the implementation process to encourage buy-in and use of the solution in the operational environment. The adoption and implementation of the recommended strategies will contribute positively towards future implementations of this nature.

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CHAPTER 1: INTRODUCTION AND STATEMENT OF PROBLEM

1.1 Introduction and Background

"Best practices tend to be built on the proper use of technology, taking into account what technology does and what it does not do, and what it was intended to do."(Curry, 2008)

The focus of this research study was to determine whether the specific business and strategic requirements of the implementation of an automated task management solution for Woolworths (Pty.) Ltd, was met within the framework of Microsoft SharePoint and to determine the critical success factors needed for the implementation thereof.

Woolworths is a large chain of retail outlets that employs a permanent staff compliment of almost eighteen thousand and five hundred employees and operates throughout South Africa, selected African countries as well as in the Middle East under the Woolworths brand name. Woolworths offers customers a carefully selected range of quality clothing, food and general merchandise and the organization prides itself on high quality standards, that not only permeates through product development but also through its entire supply chain and operations. During 2008, Woolworths won the International Responsible Retailer of the Year award at the World Retail Awards Ceremony which was held during the annual World Retail Congress and which positioned the company at the forefront of corporate responsibility initiatives.

Woolworths's revenue for the 2007/2008 financial year increased by 16.7% to R21.8 billion when compared to the previous year while operating profit before tax, exceptional items and before the BEE charge was R1.8 billion (Woolworths,

2008). As a large retail organization, Woolworths, like many other companies, has to ensure that integrated business processes are executed effectively via an effective communication platform. As a result of this requirement (to execute these key business processes in Woolworths), the organization felt a systemic framework was required in which tasks and communication processes could be effectively implemented, monitored and managed. According to Goetsch and Davis (2006:334) effective leadership by definition requires effective communication and if total quality is the engine, communication is the oil that keeps it running. It is for the latter reason (effective communication) that Woolworths decided to implement the aforementioned automated task management solution.

The researcher currently performs the role of IT Business Manager for Woolworths and specifically manages franchise and back-office applications. Contained in the back-office systems environment is a competency area called Store Productivity, which has to implement tools and technology to assist with the creation of a more effective "store environment". These technologies are shared with the Retail Operation Group who is responsible for managing the store environment. Once sign-off from the Retail Operations Group is obtained (particularly in terms of soft-ware procurement and application), the deployment of the technology becomes a joint initiative. Each competency area (Retail Operations Group and Information Technology) is accountable for their side of the implementation. Ultimately, business processes determine how the business will use the technology solution in daily operations once it has been deployed (Curry, 2008). As at April 2009, the aforementioned Microsoft automated task management and communication solution had not yet been implemented, however the business was in the process of trying to understand what the business requirements were and articulating it into a functional specification so that development work could commence with the appointed development vendor. This meant that the business needed to ensure that key functional considerations were being taken into account before development started.

1.2 Research Problem

The specific research problem that was investigated in this research study was the identification of the critical success factors in the implementation of a store communications portal for Woolworths Pty Ltd (South Africa). In support of the stated problem, four subordinate questions were investigated.

1. What were the key considerations or unique features for both store and head office managers when implementing a task management and communication solution for Woolworths within the framework of Microsoft SharePoint and overall Woolworths current architected technical environment?
2. What were the gaps and opportunities that exist in the current specified Woolworths automated task management and communication model when compared to the business requirement and best practice?
3. What was the impact on stores when implementing the improved business process monitoring tool using the Microsoft SharePoint framework?
4. Relative to the business requirements, did the implementation of the proposed store communication solution offer a strategic fit (strategic alignment) for Woolworths and offer a return on investment or a competitive advantage in the market place.

According to Curry (2008:xxvi), design decisions tend to account for how technology can fit into the current culture and how it will map to meeting the business and technology requirement.

1.3 Purpose and Objectives of the Research

As stated in the introduction to this research study, the researcher holds the role of IT Business Manager (back-office applications) tasked with implementing a web-based store portal that would facilitate store communications and automated task management for such stores (from an IT perspective). Hopefully

the findings from this research study will allow for reflection against the set Head Office business requirements as well as end user expectations and subsequently provide an opportunity to process alternate courses of action or solutions for future releases or upgrades of such applications if required.

Taking into account the stated problem and sub questions above, this research study attempted to determine whether the organizational objectives for the implementation of the Microsoft software package were met. Should gaps be identified in the implementation of the store portal strategy, it was the researcher's intention to recommend risk mitigation strategies so that shortfalls or gaps maybe filled in future roll-outs of the software.

Dr. Peter Duchessi, who is an Associate Professor of Information Technology Management at the School of Business at Albany State University in the USA says many retailers are plagued by "...the last mile problem." In retailing, the last mile problem refers to the inability to successfully execute corporate strategies consistently in all stores. According to the above-mentioned author and researcher, "...too often, and to the detriment of the retailer stakeholders, there is a conspicuous disparity between what senior managers want to happen in retail stores and what actually happens." Hopefully this research will unearth solutions to last mile problems for the benefit of all the stakeholders who are involved in the implementation and successful running of Woolworths' communications portal.

1.4 Implications and objectives of the Research of Study

The implications of the research are significant, at both an organizational and a personal level relative the researcher's current role within the organization. From an academic perspective the researcher would like to develop a model for other retail organizations wanting to implement similar task management packages and communication portal solutions within their respective organizations. In

other words should generic gaps be identified other retail organizations may take cognizance of such shortfalls/problems prior to the implementation of such initiatives.

The research objectives were as follows:

1. To identify what the critical success factors are for the Woolworths Store Communications Portal initiative.
2. To identify gaps within current Store Communications Portal development and assess the impacts of them on the business objectives.
3. Based on the research study outcome, what should be the next focal points for Woolworths relative to the Store Communications Portal roadmap/upgrade path?

The researcher intended taking into account implementation considerations from both a head office and store management perspective. This was assessed against the chosen framework within the System Development Life Cycle (SDLC), and did not evaluate the detail around specific interest groups such as technology vendors who were involved with the design and development process. Where issues are identified without any deeper analysis provided, these were presented as an opportunity for further study.

1.5 Research Approach

The researcher pursued a hybrid research approach that was both participatory and evaluative in nature. Evaluation research (implementation evaluation research) aims to answer the question of whether an intervention (program or strategy) has been properly implemented and whether the target group has been adequately covered (Mouton, 2005:158)

The reason taken for this approach was that research presents a unique opportunity to assess the criteria against a predetermined "super user group" as

well as the eventual intended users being store and divisional managers. The view around what user requirements were, have been taken into account and a quantitative component was used to assess whether the original view taken had been met. Welman, Kruger and Mitchell (2006:52) refer to a research design as the plan according to which we obtain research participants and collect information from them. As the research study takes a predominantly qualitative approach and seeks to obtain views, opinions, attitudes and feelings, a survey research design was used.

In other words the aim of the approach was to validate whether the business input had been appropriately assessed and captured within the design of the system. Where new alternatives or requirements were brought forward, an evaluation qualitative approach was taken. The reason for this approach was to understand what recommendations (if any) should be taken into account when addressing the gaps and formulating the upgrade path or next development that had to take place. Qualitative (or "naturalistic") evaluation approaches involve the use of predominantly qualitative research methods to describe and evaluate the performance of programs in their natural settings, focusing on the process of implementation rather than on the (quantifiable) outcomes. Empowerment evaluation is the use of evaluation concepts, techniques and findings to foster improvement and self determination (Mouton, 2005:161) In terms of the sub questions as stated under the research problem above, these were mostly researched at a quantitative level. The use of surveys was used to obtain the opinion of the targeted population. Mouton (2005:152) describes surveys as studies that are usually quantitative in nature and aims to provide a broad overview of a representative sample of a large population.

1.6 Intended Population Sample

According to Chisnall (1986:47), sampling is one of the major tools in marketing research, which is concerned with collecting, analyzing and interpreting market data. He provides the following definitions associated with sampling:

- **The population** (universe) which refers to the group of people that form the subject of the study in a particular survey;
- **The sample** is a microcosm of the population from which it is drawn, and must therefore be representative of the population from which they are drawn so that valid conclusions about the population can be inferred;
- **The sampling frame** refers to a list or other records of a population from which a sample can be selected”.

Jankowicz (2000) defines sampling as “...the deliberate choice of a number of people, the sample, who are to provide you with data from which you will draw conclusions about some larger group, the population whom these people represent.” With regards to sample selection, Cooper (1995:205) suggests that “...much folklore surrounds the question of what sample size is needed and that one false belief is that a sample must be large or it is not representative.” Cooper (1995:206) further states, “... the most important factor in determining the size of the sample needed for estimating a population parameter, is the size of the population variance.” Therefore the greater the dispersion or variance in the sample the greater the sample must be in order to provide precision.

Jankowicz (2005:202) also mentions that in order for the researcher to draw a sample, you have to know how many units are in the population and how this total is made up from units falling into various subgroups. In this case the researcher chose to draw up his own list which according to Jankowicz is called a “sampling frame”. The size of the sample and the way which one draws it are matters for design will affect the validity of the conclusions drawn.

This research study focuses on researching views and opinions expressed by the SharePoint implementation team, user group and project sponsors. It is the expressed view of the researcher that the quality of the responses is more important than the quantity of respondents or sample size. With this sample group, all areas of the Woolworths organization affected by the SharePoint implementation were involved and it was felt that the feedback and opinions obtained via this group would represent the views of the larger organization. According to Jankowicz (2005:202), this type of sample selection falls under non-probability sampling and more specifically a combination between purposive and convenience sampling which involves identifying and questioning informants because you are interested in their individual positions, roles or background experience. Welman, Kruger and Mitchell (2005:69) define convenience sampling as "...haphazardly selecting those cases that are easiest to obtain for the researcher's sample." They also annotate that this technique of sampling is open to bias and influences that are beyond the researcher's control due to the fact that the cases appear in the sample because they were easy to obtain. However to counter the argument it must be remembered that there is little variation in the population and such samples can serve as pilots to a study. Jankowicz (2005:202) also mentions that since the researcher is seeking to exemplify the range of different views in the population, the proportion of the population whom you choose to talk to has no particular significance, other than making things manageable in the time available to the researcher. According to Welman, Kruger and Mitchell (2006:69) researchers rely on purposive sampling to "...deliberately obtain units of analysis in such a manner that the sample they obtain may be regarded as being representative of the relevant population". In other words the researcher uses his or her judgment when determining the respondents who will participate in the research process. The researcher therefore used a hybrid approach by utilizing his judgment in terms of who was

going to be selected which conveniently was the “super user group” in this particular study.

As a result, the researcher decided to use the SharePoint implementation team, the selected user group and all the members of the stores communication portal as the research population which consisted of all the people who were eventually affected by the implementation of the IT solution. This represented a population of approximately two hundred and fifty managers including store and regional management. The sample size the researcher used to conduct research was twenty people who represented the “super user” group that tested the system prior to the roll out. The group therefore represented managers on both a national and regional basis.

As stated above, the population for this study consisted of all the members of the store communications portal project team as well as a select group of “super users” and store management. The project team including super users consists of twenty people and the intended store management sample will also be twenty. There are currently approximately 380 stores (including franchise, International and Engen). It was trusted that the views, opinions and feelings of the sample would be representative of those of the entire population affected by the implementation of the aforementioned process.

1.7 Research Methodology, Data Collection and Analysis

The study included the following three consecutive phases of research:

1. Collecting input through the literature review process which included academic research, industry analysis, case studies and outputs of the functional design group
2. Collecting Data which included structured depth interviews (qualitative) and the user group survey (qualitative and quantitative)
3. An analysis which reviewed the data that were collected.

The qualitative data pertaining to this research was gathered by means of individual interviews with the project sponsors as well as structured questionnaires that were sent to the user group that represent Woolworths corporate stores nationally. The choice of questionnaires was based on three parameters, namely, to reduce the time needed to complete the questionnaire, to reduce the complexity of the content and to allow for ease of completion. By ensuring that questions were structured around functional design and outcomes rather than technical capabilities of the SharePoint framework, it was the researcher's opinion that this would provide the appropriate data to analyze and provide detailed results in order to come to conclusions and make possible recommendations should they be needed. As this research was designed around whether Woolworths functional requirements were met through the design process and within the SharePoint framework, no investigations, questionnaires or interviews were conducted outside the organization. According to Murdick (1969:8), the distinction between facts on the one hand and beliefs about facts, opinions and attitudes on the other was explained and acknowledged by the researcher. The researcher did however obtain relative information on systems design and business communication, through other journal articles, academic papers and various internet materials. The choice of focused depth interviews was to align the project in relation to Aaker, Kumar and Day's (2003: 191) suggestion that such methodology/technique should provide the researcher with the opportunity to explore the subject matter comprehensively as face-to-face interviews would allow the researcher to "read" the respondents feedback and obtain further clarity. The depth interviews were only used on senior management as this process was used to investigate whether the strategic intent of the communication portal had been met. It was the intent of the researcher to ensure that there was alignment between the questionnaires that will be sent to the user community and the interview components that targeted the senior management team.

Mouton (2005:108) suggests that analysis involves breaking the data up into manageable themes, trends and relationships. The aim of analysis is to understand the various constitutive elements of one's data through inspection of the relationships between concepts, constructs and variables to see whether any patterns or trends can be identified or isolated. This is commonly referred to as synthesis. The feedback from the various respondents was reflected through graphical charts and appropriate explanations of the results which can be found in chapter four. Data analysis was made practicable by a robust game plan, which Pettigrew (1990:282) calls "...routes to structures understanding..." some of which are as follows:

1. Be clear about research objectives
2. Be clear about unit of analysis and study questions
3. Come to terms with time
4. Make your research method explicit
5. Make your meta level analytical framework explicit
6. Identify themes across the data
7. Use techniques of data reduction and display.

Further to this, Partington (2002:176) suggests that it is the elements in common that are becoming widely shared commodities, and that it is the uniqueness area that requires special attention. It is the intent of the research to highlight the areas where there are gaps in the communication portal functional design so that corrective action may be taken to close these respective gaps for the benefit of both of Woolworths' internal and external customers.

1.8 Delimitations

The study focuses on store communication portals and task management. The target entity is Woolworths Pty Ltd (South Africa) and is concentrated to its store base. The aim of the study was to assess what the critical success factors are for the implementation of such an initiative, whether user expectations have been met and whether any gaps existed so that these gaps may be addressed. This is not an evaluation of the Microsoft, Microsoft Office SharePoint Server, its associated partners or competitive applications.

1.9 Proposed Research Outline and Expected Dates of Completion

1.9.1 Chapter 2 of this research defines task management and the communication strategies within the context of available tools and applications. It describes the general organizational and user rationale implementing strategies and tools such as those provided within the Microsoft SharePoint framework. This has been reviewed as a precursor to defining both organizational and user requirements as evident through academic research, industry analysis and user forum evidence. Generic communication, change management and System Development Life Cycle (SDLC) theories are reviewed as a basis for change interventions that are critical for the introduction and implementation of new technology.

1.9.2 Chapter 3 outlines the research method and design. It highlights the methods used to obtain the relevant research data and the analysis thereof.

1.9.3 Chapter 4 discusses the results of the research that was conducted. The focus was to assess whether Woolworths and user criteria are met against the framework and Woolworths-relevant implementation contexts

1.9.4 Chapter 5 discusses the conclusions that were derived from the research study and the recommendations that were made to close both pre and post

implementation gaps in the Woolworths automated task management solution. These recommendations have been focused primarily at Woolworths in line with the company's overall objectives and strategy alignment processes.

1.9.5 Chapter 6 presents the limitations of the research and further opportunities for additional research on then subject.

CHAPTER 2: LITERATURE REVIEW

2.1 Introduction

This chapter discusses the definition of task management and corporate communication. It also highlights best practices in corporate communication and the potential impact/benefits of having a structured communications/task management model in place at Woolworths. It looks at how corporate communication should be organized and formulates a view on what the generic critical success factors would be in organizing and implementing the corporate communications model effectively. Although this research does evaluate the various tools available and used in executing the strategy, it does define what the various tools do and what they offer to a certain degree. The focus of this chapter centers on the Woolworths' communication framework and the rationale as to why it should be implemented. The chapter concludes by introducing chapter three which is concerned with the research methodologies that were used to derive the primary data that were required to complete the research study.

2.2 The Communication Process

The communication process and task management is now discussed.

2.2.1 The Definition of Communication and Task Management

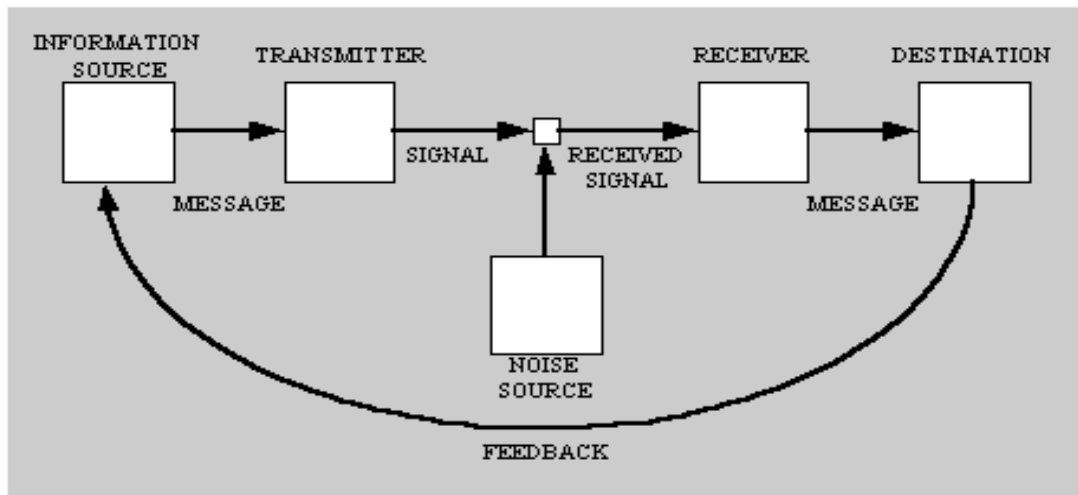
Van Staden (2007:10) defines communication as a "...two-way process whereby information is sent from one person (the sender) through a channel to another person (the receiver) who in turn reacts by providing feedback." Feedback (also referred to as a reaction or response) is the message the receiver sends in response to the sender's message. It is the receiver's reaction. Feedback can be verbal or non verbal and is often an indication whether the communication has taken place successfully or not. Feedback also helps the sender to establish

whether the message has been correctly understood or actioned. Using this definition in a Woolworths perspective, the task management component applies and is realized through acknowledging the communication or task sent to stores (through the acquired toolset). Within the Woolworths organization, a task is generally referred to as a piece of work requiring effort, resources and having a concrete outcome.

2.2.2 A Communication Model

As stated previously in this chapter, the communication process includes a number of activities. [Figure 2.1](#) below provides a diagrammatical illustration of the communication process.

Figure 2.1: The communications process



Source: Van Staden (2007)

According to Van Staden (2007:11) and what can be observed in [Figure 2.1](#) above, the **sender** (also referred to as the **source**) is the person who initiates the communication activity and formulates the message. In the Woolworths communication/task management model this would be Central Stores Communications Team, Divisional Managers and Store Managers.

The **receiver** (also referred to as the destination or decoder) is the person to whom the sender directs the message. The receiver takes an active part in the communications process and is responsible for making sense of, interpreting and reacting to the message. In the Woolworths communication/task management model, this would be Store Managers.

The channel (**transmitter**) is the way in which the message is sent from sender to receiver and feedback is sent from receiver to sender. In the Woolworths communication/task management model, this would be the Communications Portal which has been designed on the Microsoft ® Office SharePoint Server 2007.

The communication barrier (**noise** source) is something that may prevent communication/task reaching the receiver. In the Woolworths communication/task management model context, this could be attributed to an incorrect loading of information/tasks on the portal, infrastructure (server or network) breakdown or application (SharePoint) failure. This could also be as a result of implementing a process prior to establishing the needs of the receiver as reflected in the communications process/model above.

2.2.3 Organizing Corporate Communication

According to van Riel (1992:142) most definitions of corporate communications start with the pursuit of synergy as the pursuit of the latter is the most important issue affecting the way organizations deploy communication as a management tool. He also speaks of the growing need to "...give form to the pursuit of coordination and integration in communication." The researcher sees this form as the communication/task management portal which Woolworths has decided to implement.

Van Riel also mentions that organizational communication consists of the following four interrelated themes:

- The location of the communication function within the organization, i.e. what tasks belong to the communication
- The organization of the communication process, i.e. the planning of all internal and external communication used by the organization
- The coordination of both function and process all communication activities in the company
- Establishment of the critical success factors for effective and efficient of the communication function and process

The history of Woolworths and related issues are now discussed.

2.3 History and Business Requirement for Woolworths

According to van Riel (1992:1), organizations use three basic forms of communication. These are marketing, organizational communication and management communication. The most important of the three is deemed to be management communication; particular with internally and externally targeted groups. The wide range of internal sources can lead to a fragmented and an even contradictory picture as to what was and what was intended to be communicated. Companies are aware of the dangers of fragmented communication and strive for an increase in mutual coherence and cohesion between all forms of internal and external communication.

In February 2008, Woolworths initiated a more structured approach to task management and communication into their store environment. With a large and growing store base, the management of the execution of scheduled activities for stores was becoming increasingly more complex. Timely execution of key processes within the store environment at structured intervals can be critical to a store meeting its key performance areas within the contracted scorecard. These

processes were designed to enable a more effective, efficient and profitable store environment underpinned by Woolworths' quality measures.

Linked to the requirement to have a more structured approach in delivering these in-store processes, the existing environment was further underpinned by the following:

- All daily communication sent to stores via Selling Operations (Head Office) had no way of being confirmed centrally irrespective of whether required actions were executed or not
- Lost focus on priority as a result of stores being overrun by non-streamlined business emails
- Prioritization of tasks were left to stores' interpretations and in some cases missing the business objective
- Woolworths did not have a tool, enabled through technology, to enable consistent execution in the field or provide store managers with a single point of entry in Woolworths' systems

Based on some of the available opportunities highlighted above, SharePoint was chosen as the framework against which key Woolworths processes and requirements could be mapped, designed and implemented. It was acknowledged that although SharePoint provided the framework, development work would be required outside the base functionality to tailor it specifically to Woolworths's requirements and hence a business proposal was submitted to the Woolworths Investment Committee for licensing, development and implementation which was then later approved.

2.4 The Microsoft ® Office SharePoint Server

Buechler describes Microsoft Office SharePoint Server 2007 (MOSS) as a product of two factors. Both are changing the way businesses operate, in what Microsoft commonly refers to as a 'new world of work.' The first factor is that teams

working together are typically located in different locations, which does present challenges for collaboration between such teams. The second is that there is an explosion of content created within these organizations. Documents and content are being created everyday and companies are struggling to keep up with this content explosion and increasingly complex compliance requirements, while enabling users to collaborate and share information. It has become crucial that organizations allow for effective collaboration in order to stay competitive and remain compliant with corporate regulations.

Microsoft has developed SharePoint to provide organizations with a solution that addresses these issues. MOSS brings together six functional areas that include Collaboration, Portal, Enterprise Search, Enterprise Content Management, Business Process and Forms and Business Intelligence. In [Figure 2.2](#) is a diagrammatic representation of these services within MOSS as presented on the Microsoft website.

Figure 2.2: The Microsoft Office SharePoint Server Services Model



It may be noted in [Figure 2.2](#) above that the Microsoft SharePoint Server services model consists of six vital elements that are all needed to ensure effective communication for its users.

2.5 Microsoft® SharePoint in the Woolworths Context

2.5.1 The Retail Environment

The retail environment is ever changing and in particular, consistent and easy interaction with the staff and the customer is becoming one of the most important aspects of the selling cycle. Leading retailers across the globe have to reconsider their strategies so that they embrace the customer in a way that fosters customer loyalty and retention and that entices higher spending levels through “lifestyle” based offers; in essence, revitalizing the interaction with the customer. Undoubtedly, the changes will take advantage of a growing number of marketing channels such as the Web, digital TV, mobile phones as well as other devices and kiosks. Very few retailers today are ignoring apparent future trends and most have, or are currently preparing strategy documents that will lead them down the path of change. Unfortunately, the exact nature of that path is not clear yet and it continues to evolve. The cost of unwittingly taking a wrong turn can and possibly will be high.

What is clear is that in order to achieve maximum effectiveness and efficiency, initiatives must be presented to the store and customer as a single coherent and consistent interface and not a set of awkward, poorly integrated services. From a management perspective, this requires well-coordinated and integrated operational procedures both within a store context and in a head office environment. As a result, this places great emphasis on the architectural flexibility (allowing for system changes and new functionality later) of any solution implemented to address these needs and on its ability to operate seamlessly across the multiple selling channels.

2.5.2 The Solution for Woolworths

Task management and communication portal frameworks are offered by a few key players in the market. Whatever solution choice is made, it has to meet the business requirement, be aligned to Woolworths IT technology strategy, have proven credibility amongst like retailers and meet Woolworths's budgetary requirements.

Possible solutions identified by Woolworths to address the business need were: Reflexis, Redprairey, Lotus Notes and SharePoint. From a retailer utilization perspective, the following international players are using SharePoint:

- Marks and Spencer
- B&Q, Sears
- Home Depot
- Albertsons
- Staples
- Best Buy,
- Lowe's
- Target,
- And locally, Edgars who has recently come off a major implementation exercise.

The criteria against which the various solutions were assessed include or are:

- It had to integrate into existing organizational tools, programs and technologies e.g. web applications, business intelligence reports
- It had to be an enterprise solution to allow for scalability in Woolworths Head Office at a later stage (application could grow with organization needs)
- Assist with the streamlining of business processes and communications

- It had to meet budgetary requirements
- Allow for the extraction of data for management reports
- It had to facilitate workflow functionality, in other words allow for tasks to be allocated or potentially redirected.

After some investigation with key business stakeholders (Woolworths business Unit Heads and store representatives) and technology partners (technology suppliers), Microsoft Office SharePoint Server 2007 was chosen as the preferred framework upon which the Woolworths requirements would be built. John Tschohl (2001:3) in his book "Eat or be Eaten" says that no organization can afford to ignore the power of e-service which comprises of its speed, efficiency and price build around service.

As stated previously in this chapter, many retailers are plagued by the last mile problem which refers to the inability to successfully execute corporate strategies consistently in all stores. Too often, and to the detriment of the retailer stakeholders, there is a conspicuous disparity between what senior managers want to happen in retail stores and what actually happens (Dr Peter Duchessi, Associate Professor of Operations, University at Albany, School of Business).

Dr Duchessi (2007) believes that the best of breed Store Task Management solution is built on a fully web services enabled composite solutions architecture comprised of Bluespring Software and Microsoft Office SharePoint Server (MOSS). Surprisingly however, only 20% of retailers have ever effectively measured their store operations to determine where the biggest problems are with regards to effective communication (AMR Research, 2005). Woolworths has identified this as an important consideration as it wishes to ensure effective communication both within and outside of the organization.

SharePoint provides workers with the functionality to connect with each other and uses a web site infrastructure to deliver most of its features. From a business value perspective, the framework is flexible enough to be modeled to meet the prescribed business agenda. Within the task management and communication portal there are inherent business risks should a structured approach (through the use of technology) not be implemented. These are:

- Centrally managed promotions, product recalls and maintenance activities
- Manager portals with Management by Exception and Key Performance Indicator interfaces with drill down capability to actual tasks and details
- Integration for Product Inventory Management System
- Easy to use data entry and task management forms that can be accessed from both Office products and "Web"

Office clients enable information workers to use familiar tools in new ways which reduce training and support costs and increase solution development opportunities. SharePoint offers organizations a much faster return on investment because SharePoint fits neatly into most companies existing technology infrastructures (Williams, 2007).

On the Bluespring software website (<http://www.bluespringsoftware.com>) the organization mentions that the best practice store task manager includes:

- Tasks received at the store level are prioritized and aligned with company goals
- Two-way feedback from employees as they complete tasks to fuel continuous improvement
- Defined Key Performance Indicators (KPI's) that initiate remediation procedures when key metrics fall outside of acceptable thresholds
- Store managers get all the information they need in one page, instead of having to rely on a barrage of uncoordinated e-mail, voicemails and fax.

2.6 The Systems Development and Project Life Cycle

Projects are ultimately responsible for the delivery of solutions to assist a business in achieving its objectives. A solution could consist of an application, documentation, and infrastructure to support or improve business process efficiencies. The project is responsible for the successful scoping, planning, execution and delivery/implementation of the solution. According to Dunn (2005:35), many of the steps of building an information system have little to do with programming a computer. The process begins with identifying the need for a business solution and acquiring a better understanding of the environment you plan to support and improve.

The project methodology employed on the Woolworths communications project consisted of a phased approach with each phase employing an iterative process. Each phase had a specific objective associated to one or more deliverables identified at project initiation and reviewed at each phase initiation. The various phases of the Woolworths project were as follows:

2.6.1 Phase 1: Envisioning

During the envisioning phase of the project, project governance was set in place by the creation of a project charter that defined the project boundaries and ensured that all stakeholders had a common understanding of the project. Analysis workshops were held to establish functional requirements of the project. The structure and requirements for the solution was documented in a functional specification.

2.6.2 Phase 2: Planning

During the envisioning phase the requirements were either taken in or out of scope depending on the nature of the business requirement offset against delivery timelines and budget. Technical analysis of the full set of requirements was performed during the planning phase in preparation for the build phase.

Once the technical analysis was done, the project plan was prepared and the project cost aligned to the finalized project scope. The project plan and its associated cost were signed off prior to the build phase commencing.

2.6.3 Phase 3: The Build Phase

It was agreed that the build phase would include the following components:

- Configure the SharePoint Environment (Install the base application)
- Red Flag Process (Development of the Woolworths requirement for key processes)
- Task Management (Development of the Task Management component within the application)
- Discussion Boards (Using SharePoint functionality so that Head Office and stores can engage in a public domain on specific matters)
- Presentation of Scorecards (Development within the SharePoint application so that Head Office can publish store specific scorecards and performance metrics on a centralized portal)
- Calendars (Development of calendar functionality that allows Head Office and Stores to have a single view of key Retail and Business relevant dates)
- Presentation of Reports (Development of report functionality within SharePoint so that activities that take place in the application can be viewed for management decision making)

2.6.4 Phase 4: Deployment

On completion of the build phase, the solution was deployed into a test environment followed by the configuration of the user acceptance testing content providers. Subsequent performance testing was performed and final user acceptance testing was conducted. Any issues identified during the user acceptance testing period were corrected and with the associated changes

applied to the technical specification. The user acceptance testing period was time boxed to ensure that testing was completed in the time allocated and a line drawn between project development and post project maintenance.

2.6.5 Phase 5: Transition

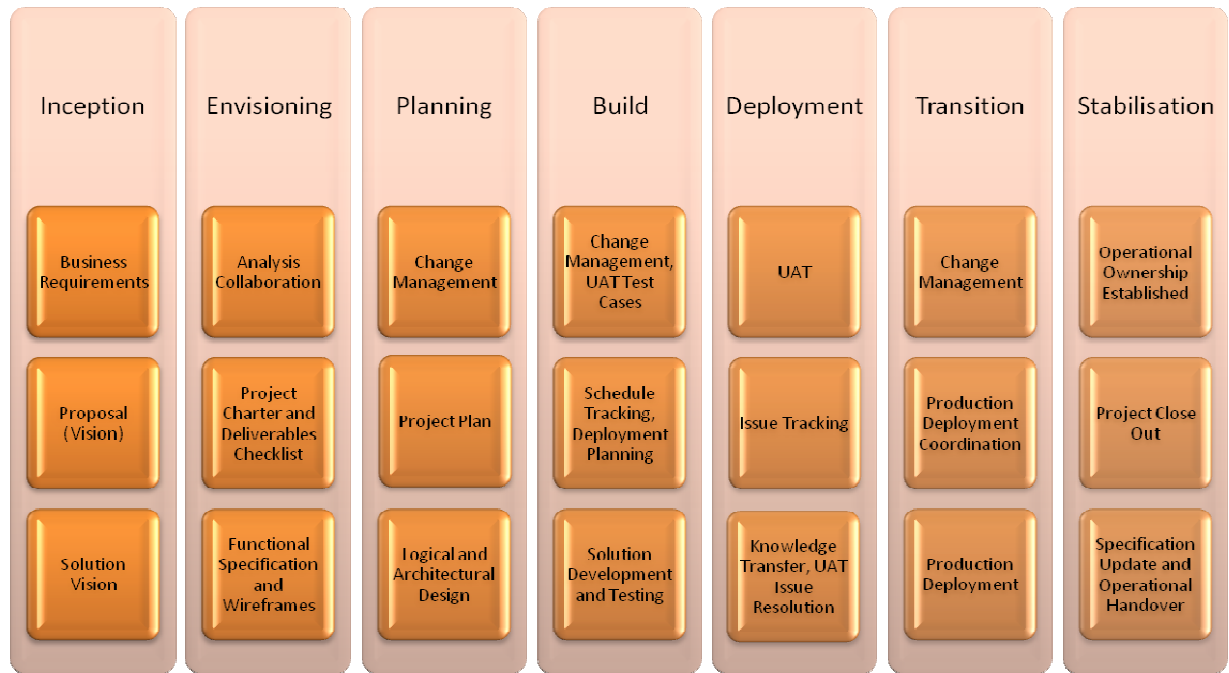
On completion of the entire user acceptance testing, the production environment was prepared and the final version of the code released.

2.6.6 Phase 6: Stabilization

Once the code was released to production, monitoring of the “live” environment took place were any application, functional or performance issues resolved through the standards Woolworths production support processes.

The project and systems development methodology adopted by Woolworths for the store communication portal has been presented in the [Figure 2.3](#) below. The purpose of including the diagram is to confirm the alignment of the adopted project management approach by Woolworths to the best practice principles highlighted in this chapter above.

Figure 2.3 – Graphical representation of Adopted Project Methodology for Woolworths Store Portal



(Source: 3fifteen Technology Solutions)

As depicted in [Figure 2.3](#) above, a project could consist of multiple project lifecycles, for example in the case of the requirement for re-usable prototyping, proof of concepts, or in the case of complex projects requiring a phased development and implementation approach. A project can also consist of one or more streams whereby the work effort is divided into logical work areas i.e. solution development, data migration, the procurement and establishment of production infrastructure. Each of these streams are managed individually and integrated at various points in the project to ensure that the common goal is achieved. In order to move from one phase to the next, the previous phase deliverables must be accepted and signed off by the project stakeholders. Underlying the project methodology as described above is a project support structure based on the PMI (Project Management Institute) knowledge areas – Scope, Budget, Time, Quality, Communications, Procurement, Risk, Integration,

and Resources. According to Olsen (2003:10), a critical success factor is an element that has to be done well in order for the activity to succeed. Olsen also mentions that user involvement in information systems is critical and clear lines of communication are also important (which not talks to the project approach in this instance but the Woolworths business meeting its overall requirement through implementation of communications portal).

Olsen (2003:12) further states, that three factors have consistently appeared as success factors in studies around projects. They are client involvement, top management support and clear statement of project objectives. Other factors that also impact projects are:

- Project mission – clear goals and directions need to be provided
- Top management support – to assure needed resources were provided
- Plan/Schedule – include detailed specifications
- Client consultation – all affected parties given a hearing
- Personnel – good people assigned to the project team
- Technical tasks – needed expertise available
- Client acceptance – sell the product of the project to the users
- Monitoring and Feedback – timely control during all stages of the project
- Communication – network and data required are available
- Troubleshooting – deal with crises and deviations.

2.7 Critical Success Factors in Organizing Corporate Communication

It appears from the literature that the formulation of an effective corporate communication/task management strategy ultimately delivers results from bottom line perspectives, be it through improved process control or being able to action a task in the most efficient and effective manner. Working from the position that the total communication effort must serve the corporate strategy, the end result is the customer experience in the store. Van Riel (1992:141)

argues that gaps in the day-to-day reality of corporate communication practices influence corporate identity negatively. The researcher sees this as part of the validation process of the Return on Investment in the appropriate communication/task management platform. Rudansky and Kloppers (2002:18) further supports this by saying a company can use a well developed communications strategy to gain a competitive edge over competitors offering more or less similar products but which do not follow a strategic approach. Many products in highly competitive markets have become extremely popular only as a result of a well executed advertising plan. Woolworths for example can use their new communications/task management portal on the SharePoint platform not only to communicate such campaigns but execute the tasks systematically across many locations nationally. Rudansky and Kloppers (2002:84) refer to the term task leadership which has to do with a leader having a clear idea of the task at hand and guides the group towards this goal and, through continual reminders and direction which ultimately strives to bring a group back on course.

According to the literature the following refer to the critical success factors associated with an effective communications strategy:

- Ensure that your organization identifies and implements a suitable framework and/ or tool for the organization of the communications/task management function
- Define and control quality standards for communication and task management practices
- Ensure that content released for review, action or comment is structured and easy to understand
- Stimulate long term interest in communication as a management tool at board level
- Ensure good management by communication managers and or administrators of the process on corporate campaigns and tasks

- Involve all internal and external stakeholders and allow them to be part of designing the communication strategy and process
- Ability to evaluate and report on the success on any communication/task campaign.

2.8 Summary

It is expected that the analysis of data and information in the subsequent chapters of this research study will not only align itself to the criteria identified above but also uncover new elements and opportunities that could be explored further.

The literature review as outlined in chapter 2 presents the key concepts that are referred to throughout this research study. In the following chapter, the researcher discussed the research methodology and presents arguments and reasons for the approach taken.

CHAPTER 3: RESEARCH METHOD AND DESIGN

3.1 Introduction

The aim of this chapter is to discuss the research methods that were employed to obtain the research data that were needed to complete this research study. The chapter commences by discussing the research problem and objectives, then proceeds to discuss the population relating to the study and finally how samples were drawn from targeted areas within the Woolworths organization which made up the research population. It further focuses on the research design, the collection of the data and the validity and reliability of the data. It concludes by introducing the next chapter of the study. The research problem and purpose of the study will now be revisited.

3.2 The Research Problem and Purpose of the Study

Welman, Kruger and Mitchell (1994:2) state that research is a process that involves obtaining scientific knowledge by means of various objective methods and procedures. The term objective indicates that these methods and procedures do not rely on personal feelings and opinions. It is rather concerned with the specific methods that are used at each stage of the research process in order to come to some meaningful conclusions regarding the data that were collected during the research project.

The focus of this research study was to determine whether the specific business and strategic requirements of the implementation of an automated task management solution for Woolworths (Pty.) Ltd, was met within the framework of Microsoft SharePoint and to also establish the critical success factors that were needed for the successful implementation thereof. By determining what the critical success factors were, it was hoped that the study would provide the researcher with sufficient insight into such critical success factors, uncover any

gaps that existed in terms of expected outcomes versus actual outcomes of the implementation of the software package, and, to finally provide recommendations regarding the next phase of implementation and upgrade of the current Woolworths store communications portal so that such implementation may go smoother than the original initiative.

The objectives of this study, as discussed in chapter one, were:

1. To identify what the critical success factors are for the Woolworths Store Communications Portal initiative.
2. To identify gaps within current Store Communications Portal development and assess the impacts of them on the business objectives.
3. Based on the research study outcome, what should be the next focal points for Woolworths relative to the Store Communications Portal roadmap/upgrade path?

3.3 Research Design and Approach

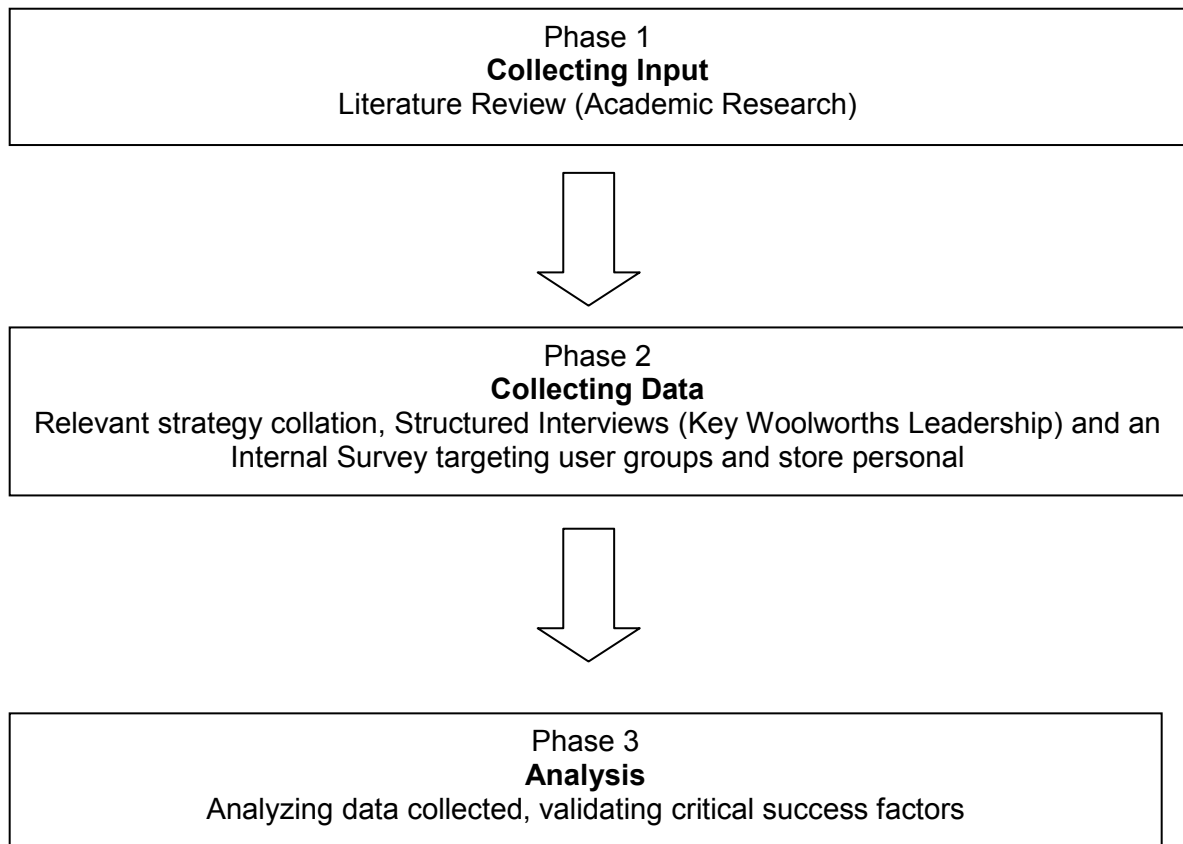
According to Welman, Kruger and Mitchell (2006:52), research design is the plan according to which we obtain research participants (subjects) and collect information from them. As the researcher wished to obtain mainly qualitative data, he pursued a hybrid research approach that was both participatory and evaluative in nature. Evaluation research (implementation evaluation research) aims to answer the question of whether an intervention (program or strategy) has been properly implemented and whether the target group has been adequately covered (Mouton, 2005:158).

As mentioned in chapter one, the reason why this approach was chosen was that the research presented a unique opportunity for the researcher to assess the outcome of the information technology software that was implemented by Woolworths for both the 'super user group' (the management team responsible

for the testing of the solution/program) and the store and divisional managers who were the intended users of the technology/software. The view was that as a result of the lack of user group input, gaps could possibly exist which could reduce the effectiveness of the software package that was installed and implemented to improve both internal and external customer service. Welman, Kruger and Mitchell (2006:52) refer to a research design as the plan according to which we obtain research participants and collect information from them. As the research study takes a predominantly qualitative approach and seeks to obtain views, opinions, attitudes and feelings, a survey research design was used.

The study included three consecutive phases of the research. These are represented in [Figure 3.1](#) below

Figure 3.1: Phases of a Research Study



As can be noted in Figure 3.1 above, phase one of the process began by proving context for the study and articulating some background around the Woolworths requirements for a Store Communications tool as well as relevant applications (tools) against which these requirements could be built. The information gathered in this phases provided the input into Phase 2.

Phase two however consisted of two research activities, namely:

1. Structured interviews with selected Woolworths' managers. This group represented a sample of Woolworths' leadership who were involved in making decisions pertaining to the adoption of the Microsoft package and the implementation of new store solutions.
2. A survey to test Woolworths store management regarding the concept of task management as well as the factors linked to the success (or lack thereof) of the Store Communications Portal implementation.

Mouton (2005:152) describes surveys as studies that are usually quantitative in nature which aim a broad overview of a representative sample of a large population. A survey design was chosen as it was felt by the researcher that it would be the most direct means of meeting the objectives of the study. Secondly, an attempt would be made to publish the survey (questionnaire) through the tools that exist on the new Store Communications Portal as a means of practically testing some of the functionality that was part of the intended design.

List (2006) maintains that the difference between quantitative and qualitative research is largely in the researcher's approach to the study. He maintains that a quantitative approach should be used when the following conditions apply:

1. The research is confirmatory rather than exploratory i.e. this is a frequently researched topic, and (numerical) data from earlier research is available.
2. You are trying to measure a trend.
3. There is no ambiguity about the concepts being measured, and only one way to measure each concept.
4. The concept is being measured on a ratio or ordinal scale.

List also maintains that a qualitative approach should be used when the following conditions apply:

1. You have no existing research data on this topic.
2. The most appropriate unit of measurement is not certain.
3. The concept is assessed on a nominal scale, with no clear demarcation points.
4. You are exploring the reasons why people do or believe something.

In this study, the researcher explored people's perception of a solution that has been implemented and the reasons as to why they have this view.

Phase three of the research study process was concerned with analysing the data that were obtained via the data collection project to evaluate whether the implementation of the Woolworths Store Communication Portal met the needs and objectives of all targeted users. Data collection methods are now explored.

3.4 Data Collection Methodology

The research data were collected in the following manner:

3.4.1 Internal Surveys

As mentioned in the aforementioned sections, data collection was conducted through a questionnaire that was sent to targeted research participants as an

actionable task (that is with a set deadline). The researcher employed this methodology and use of the communication tool (the new Woolworths' Store Communication Portal) in order to potentially increase the response rate and to reduce time wastage. Internal surveys were employed to test the reaction of a representative group of Woolworths store managers to the implementation of the Store Communications Portal. This research provided a detailed quantitative and qualitative view of store management reactions to the deployment of the tool.

3.4.2 Survey (Questionnaire) Design

A web based survey consisting of sixteen key questions (total answerable 53 statements) was used to obtain part of the data for this study. The respondent selected the appropriate response on a "yes" or "no" basis with provision made for further comment on each of the responses. This input mechanism was chosen to provide a mutually exclusive data input mechanism for analysis. Opportunity was provided for respondents to add qualitative comments via a text box. The intention of the questionnaire was to make it easy to understand and not too time consuming to complete. The questionnaire focused on the following areas:

1. Stakeholder engagement prior to design
2. Implementation processes and considerations
3. System functionality
4. Intuitiveness of the system
5. Recommendations for change
6. Return on investment

The questions that make up the survey are presented in [Table 3.1](#) below.

Table 3.1: Survey Question Structure

Question	Type	Aim
<p>1. Do you believe enough stakeholder engagement took place prior to the implementation of the store task management and communication portal?</p> <p><i>Please provide reason for response</i></p>	Yes/No	To test the level of stakeholder engagement prior to design
<p>2. Do you believe that the Implementation Team addressed the store requirement effectively through the design process?</p> <p><i>Please provide reason for response</i></p>	Yes/No	To test whether store management felt the business requirement has been met
<p>3. Do you believe that the Implementation Team addressed the head office requirement effectively through the design process? (Head Office Response Only)</p> <p><i>Please provide reason for response</i></p>	Yes/No	To test whether head office management felt the business requirement has been met
<p>4. Do you believe the following key considerations should have been taken into account for the SharePoint implementation?</p>	Yes/No	To further test whether specific "key considerations" have been included as part of the new communication portal functionality
<ul style="list-style-type: none"> ▪ User Engagement (refers to the design team talking to future users of the system) 		
<ul style="list-style-type: none"> ▪ Improved Communication from Head Office to stores 		
<ul style="list-style-type: none"> ▪ That the new system allow for improved task management and communication 		

<ul style="list-style-type: none"> ▪ That stores to head office communication has improved subsequently 		
<ul style="list-style-type: none"> ▪ That cost should have defined the solution 		
<ul style="list-style-type: none"> ▪ That the solution should have defined the cost. 		
<ul style="list-style-type: none"> ▪ Other (please specify under comments) <p><i>Please provide any additional reasoning as to your responses above:</i></p>		
<p>5. Do you believe that the new SharePoint solution has delivered the ability to?</p>	Yes/No	To test whether the new store communication portal has improved on certain processes (cost and communication)
<ul style="list-style-type: none"> ▪ Process and execute the Woolworths strategy more effectively 		
<ul style="list-style-type: none"> ▪ Improved Communication from Head Office to stores 		
<ul style="list-style-type: none"> ▪ That the new system allow for improved task management and communication 		
<ul style="list-style-type: none"> ▪ That stores to head office communication has improved subsequently 		
<ul style="list-style-type: none"> ▪ That cost should have defined the solution 		
<ul style="list-style-type: none"> ▪ That the solution should have defined the cost 		
<ul style="list-style-type: none"> ▪ Other (please specify under comments) <p><i>Please provide any additional reasoning as to your responses above:</i></p>		
<p>6. Do you believe that the new SharePoint solution has delivered the ability to?</p>	Yes/No	To test whether the new store communication portal has improved on certain processes
<ul style="list-style-type: none"> ▪ Process and execute the Woolworths strategy 		

more effectively		
<ul style="list-style-type: none"> ▪ Create a culture shift (changed our attitude towards communication and task execution) 		
<ul style="list-style-type: none"> ▪ Create a workspace where intellectual property can be stored and accessed easily and become an enabler to improved management decision making 		
<ul style="list-style-type: none"> ▪ Change the way Head Office and Stores engage with each other 		
<ul style="list-style-type: none"> ▪ Create a single contact point around management tasks 		
<ul style="list-style-type: none"> ▪ Create a single contact point for Head Office to engage with stores 		
<ul style="list-style-type: none"> ▪ Create the opportunity for you to collaborate with your store network and regional management structures 		
<ul style="list-style-type: none"> ▪ Potentially reduce waste own damages (through the Red Flag Process) 		
<ul style="list-style-type: none"> ▪ Facilitate learning/training interventions 		
<ul style="list-style-type: none"> ▪ Create a platform on which future requirements can be built <p><i>Please provide any additional reasoning as to your responses above</i></p>		
7. Do you believe that SharePoint is sufficiently intuitive (easy to understand and navigate) in order to manage the various day to day activities within your store?	Yes/No	To test respondents view on the intuitiveness/user friendliness of the solution
8. Where do you believe the Communications Portal solution has delivered/not succeeded?	Yes/No	This is a 'catch all' question aimed at distilling an overall measure of respondents perception of the solution

<ul style="list-style-type: none"> ▪ It will give Woolworths the competitive advantage 		
<ul style="list-style-type: none"> ▪ It provides a secure environment for Store Managers to operate in 		
<ul style="list-style-type: none"> ▪ I believe the solution is world class 		
<ul style="list-style-type: none"> ▪ It will deliver a return on investment for Woolworths 		
<ul style="list-style-type: none"> ▪ It has impacted our business positively (please comment) 		
<ul style="list-style-type: none"> ▪ It has allowed me to become more productive 		
<ul style="list-style-type: none"> ▪ It has forced me to perform actions within the time constraints provided by Head Office 		
<ul style="list-style-type: none"> ▪ It reminds me to perform tasks that I would have previously forgotten 		
<ul style="list-style-type: none"> ▪ It is better than the previous communications process 		
<ul style="list-style-type: none"> ▪ It performs the same as the old Imbizo (web) system 		
<ul style="list-style-type: none"> ▪ The system responds quickly <p><i>Please provide any additional reasoning as to your responses above</i></p>		
<p>9. Do you believe the new solution has improved store communication and task effectiveness?</p> <p><i>Please provide reason for response</i></p>	Yes/No	To test respondents view on whether the solution has taken a step forward as compared to previous communication and task management processes
<p>10. Has the solution taken away the flood of communication from other sources in the business?</p> <p><i>Please provide reason for response</i></p>	Yes/No	To test respondents view on whether the solution has taken a step forward as

		compared to previous communication and task management processes
11. Would you change or add to improve the current solution? <i>Please provide reason for response</i>	Yes/No	This question tests respondents perceptions around potential gaps in the new solution
12. Do you believe this solution can provide Woolworths with a competitive advantage and if so in which way?	Yes/No	This question tests respondents view around the solution providing a competitive advantage and ultimately a return on investment
<ul style="list-style-type: none"> ▪ Provide improved and more structured activities around processes and other campaigns 		
<ul style="list-style-type: none"> ▪ More effective store staff through better executed communication strategies 		
<ul style="list-style-type: none"> ▪ That store managers are managed through the solution on their ability to execute tasks more effectively 		
<ul style="list-style-type: none"> ▪ The fact that store managers can upload action plans which means they have to think about store improvement initiatives 		
<ul style="list-style-type: none"> ▪ The store has a better idea of what is planned through the integrated store calendar 		
<ul style="list-style-type: none"> ▪ Other (please specify) 		

Source: The Researcher

3.4.3 Woolworths Leadership Interviews

Personal depth interviews with a select group of Woolworths leaders were also conducted to explore various opinions with regards to the implementation of the Woolworths Store Communication Portal. Internal leadership interviews were constructed to assess the critical considerations and perceived success factors for the Store Communications Portal. The research included the assessment of a common understanding of the technology tool, the key links to the business requirement and organisational strategy and anticipated application of the toolset within the organisation in the months ahead. As opinions, views and attitudes were mainly targeted; two-way communication was encouraged to garner as much data as possible. The researcher therefore used open-ended questions as a tool/technique to solicit the required data.

3.5 Sampling

As mentioned in chapter one, this research study focused on researching the views and opinions expressed by the SharePoint implementation team, its user group and lastly the project sponsors. With this sample group, all areas of the Woolworths organization affected by the SharePoint implementation were involved and it is felt that the feedback and opinions obtained via this group would represent the views of the larger organization.

According to Jankowicz (2005:202), the type of sample selection falls under non-probability sampling and more specifically a combination of convenience and purposive sampling which involves identifying and questioning informants because you are interested in their individual positions, roles or background experience. Welman, Kruger and Mitchell (2005:69) define convenience sampling as haphazardly selecting those cases that are easiest to obtain for the researcher's sample whereas purposive sampling (judgmental sampling) according to Sudman and Blair (1998:348) is sampling in which the researcher chooses who would be representative of the population. They also annotate that

this technique of sampling is open to bias and influences that are beyond the researcher's control due to the fact that the cases appear in the sample because they were easy to obtain. However, it must be noted that in this instance the sample was not haphazardly selected as the players who were selected in the sample were known to the researcher. This coincides with Sudman and Blair (1998:348) who assert that research participants do not have to be haphazardly selected to qualify as convenience sampling as they also qualify if the population members are easily available to the researcher. The sample was made up of members of the "super user group" because of the following:

1. They were testers and users of the communication tool.
2. They were not involved in any way with the procurement of the software package. In other words they did not personally finance the package out of their own pockets.
3. They were most often not consulted prior to deployment of the package/system
4. They were unbiased as they had no personal financial or other investment in the system.

Jankowicz (2005:202) mentions that by selecting such a mode of sampling the researcher is seeking to exemplify the range of different views in the population. He continues by arguing that the proportion of the population whom you choose to talk to has no particular significance, other than making things manageable in the time available to the researcher. As a result, the researcher decided to use the SharePoint implementation team and selected user group as the population. The total user group (and therefore the research population) that was eventually affected by the implementation of the IT solution was approximately two hundred and fifty managers including store and regional management.

Should the researcher have used a probability sampling technique (random sampling) then the size of the sample should have been 152 respondents (using a 95% confidence level, a 5% confidence interval and a 50% response distribution). However as opinions, views and attitudes were to be measured from a homogenous group of employees, it was decided to obtain responses from forty-five people. This equated to 18% of total population of 250 people/users. Most research study experts assert that size counts when assessing the extent of a sample, particularly when it comes to random sampling. However, as views, opinions and attitudes of a homogenous group were sought about a subject which concerned them in a work environment, it was felt by the researcher that the size of the sample (45 respondents) would not negatively impact on the accuracy of the research study. Put it another way if the research study was concerned with obtaining views from Muslims on the consumption of pork in relation to the tenets of their religion, the opinion of one Muslim should be representative of the views and opinions of all Muslims throughout the world. The researcher felt therefore that as group, members were similar, that they collectively hoped to improve communication within the organization, were not personally (financially) involved in the procurement of the system and finally that they worked closely together under an umbrella of a culture of customer centricism, that their collective views would be representative of the entire population as a whole.

As stated previously in this chapter, the research population consisted of all the members of the store communications portal project team as well as a select group of "super users" and store management. The project team included super users, store managers and other related users.

3.6 Analysis

According to Mouton (2001:108), analysis involves "...breaking up the data into manageable themes, patterns, trends and relationships." The aim of analysis therefore is to understand the different elements of the data collected through an inspection of the relationships between concepts or variables, and to determine whether there are any trends or patterns that can be identified or isolated in the data. The data collected through the data collection process were then collated and analyzed (using the appropriate tools applicable for such research design), the results of which may be found in chapter four which follows this chapter.

3.7 Summary

Chapter three provided a detailed view of the research approach employed in this study. It included the research design, the methods used to obtain the required research data and finally the methods used to analyze the research data which is reflected and presented in chapter four. Chapter four which follows discusses the findings of the research study.

CHAPTER 4:

RESEARCH FINDINGS AND CONCLUSIONS

4.1 Introduction

In chapter three the research methodology was discussed. The goal of this chapter (chapter four) is to analyze the data that was collected during the data collection process. In doing so, the critical success factors as defined in the literature review for a store communications portal at Woolworths were assessed and any additional considerations specific the data analysis have been highlighted. These results form the basis for the conclusions derived from the study and the recommendations that the researcher has made regarding any future system rollout.

4.2 Woolworths Strategic Alignment Analysis

Contained in the literature review were a number of key benefits associated not only with a well defined communications strategy but also with the implementing of a toolset against which the communication strategy may be tailored. The key strategic drivers for Woolworths as an organization for the financial year 2008/2009 were:

1. Operational Excellence.

This included the following objectives:

- Turn operational excellence with information integrity into a commodity
- Ensure predictable operational excellence through day-to-day service focus and project delivery
- Provide accurate and on-time business information to enable effective decision making

2. Lead our customer.

This included the following goals:

- Have the ability to swiftly respond to business change with robust solutions and lead the business through technology innovation
- Form a close partnership with the business and key external partners to deliver to our customer's needs
- Explore new technologies for potential business benefit and where appropriate develop into value add solutions for our customers

3. Consistent profit growth.

Here the objectives were centered on:

- **Value creation** through a commercial mindset
- Improve operational efficiencies to **reduce operational expenses**
- Driving **maximum returns** by leveraging current IT solutions
- Design, manage and monitor key IT and business **financial measures** and processes

4. Passionate, committed retailers.

In this instance the objectives were to:

- Create a sustainable, high performing and diverse team that is an [icon] of fund, energy, commitment and passion for successful execution

5. Sustainability.

Here the key consideration was:

- Ensure all solutions and processes are aligned to business objectives and governed through clear architectural and commercial principles

Against the set strategy, the following areas were identified where the key strategic fit requirements may be met:

1. **Operational Excellence.** A leaner, fitter more productive business (productivity, efficiency improvements which deliver an optimal expense base).
2. **Lead our customer.** Explore new technologies for potential business benefit and where appropriate develop into value add solutions for our customers.
3. **Sustainability.** Ensure all solutions and processes are aligned to business objectives and governed through clear architectural and commercial principles

The above reflects Woolworths' stated strategic intent as represented through the analysis of various strategy documents within the Woolworths organization.

4.3 Internal Survey

In November 2009, survey questionnaires were posted on the new store communications portal to assess store management views on the critical success factors for the Woolworths store communication portal (SharePoint) implementation which were also highlighted in chapter two of this study. The survey link was sent to forty-five managers (through SharePoint Task Management) on a national basis. Of the forty five managers, thirty six responded. Five questionnaires did not meet the criteria to be deemed successfully completed which left thirty one surveys available for analysis and review. The original target sample (as defined in chapter three) was forty-five respondents.

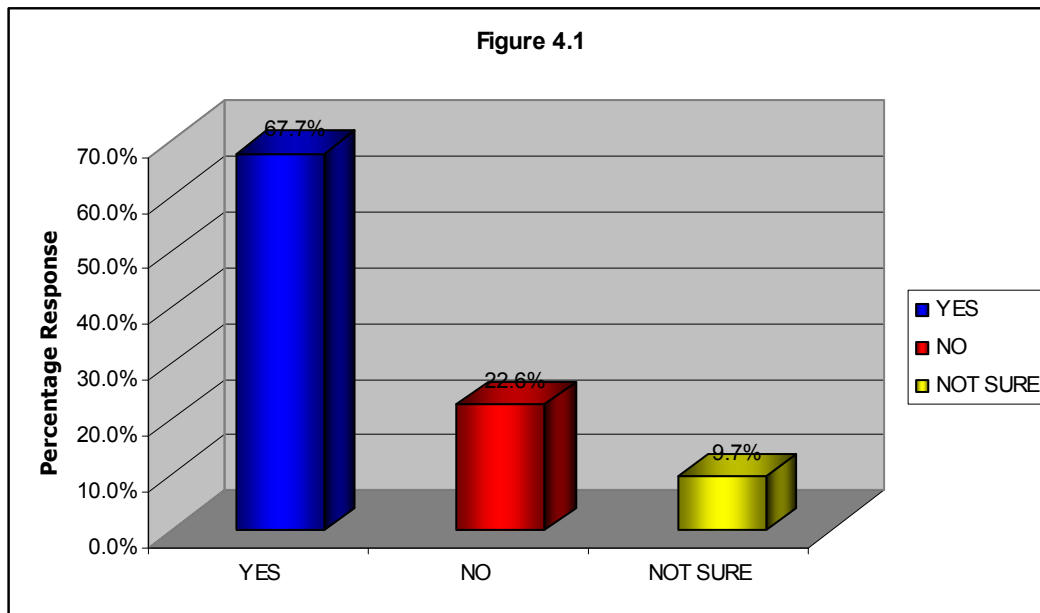
4.4 Analysis of the Results

Each of the questions posed to respondents were analyzed individually, validating where relevant the congruence with the identified critical success factors. This survey does not factor general negative sentiment that may be inherent in some staff within the organization.

4.4.1 Research Question 1

Do you believe enough stakeholder engagement took place prior to the implementation of the store task management and communication portal?

Figure 4.1 – Graphical representation of responses to Question 1



To this question, twenty one respondents felt that enough stakeholder engagement took place, seven felt there was not enough and three were unsure. Therefore 67.7% felt that there was sufficient engagement.

Explanation of Findings Represented in Figure 4.1

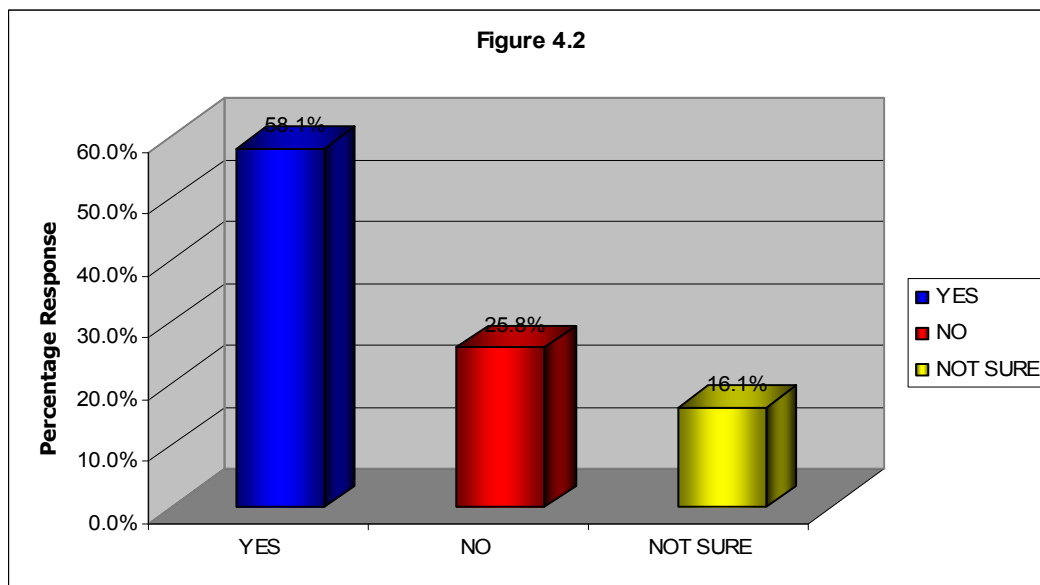
If the respondents to the statements are considered adequate proxies for the research question under consideration, Figure 4.1 above indicates that the majority of store management was engaged. However, there is an opportunity going forward to manage the expectations of store management around their involvement in initiatives like this going forward.

Some of the comments included reflected that communication to stores was a bit one way (did not cater for store feedback to Head Office) and there was a general sentiment about wanting to be more included. For the staff members who were not involved in the upfront consultative process, proactive communication might be required relative to which store management is involved in the process and what the inputs and decisions were.

4.4.2 Research Question 2

Do you believe that the Implementation team addressed the store requirement effectively through the design process?

Figure 4.2 – Graphical representation of responses to Question 2



In this question, eighteen respondents felt that the store requirement was addressed effectively, eight said "No" and five were unsure. In this instance, 58.1% felt the requirement was addressed, 25.8% annotated "No" and 16.1% were unsure.

Explanation of Findings Represented in Figure 4.2

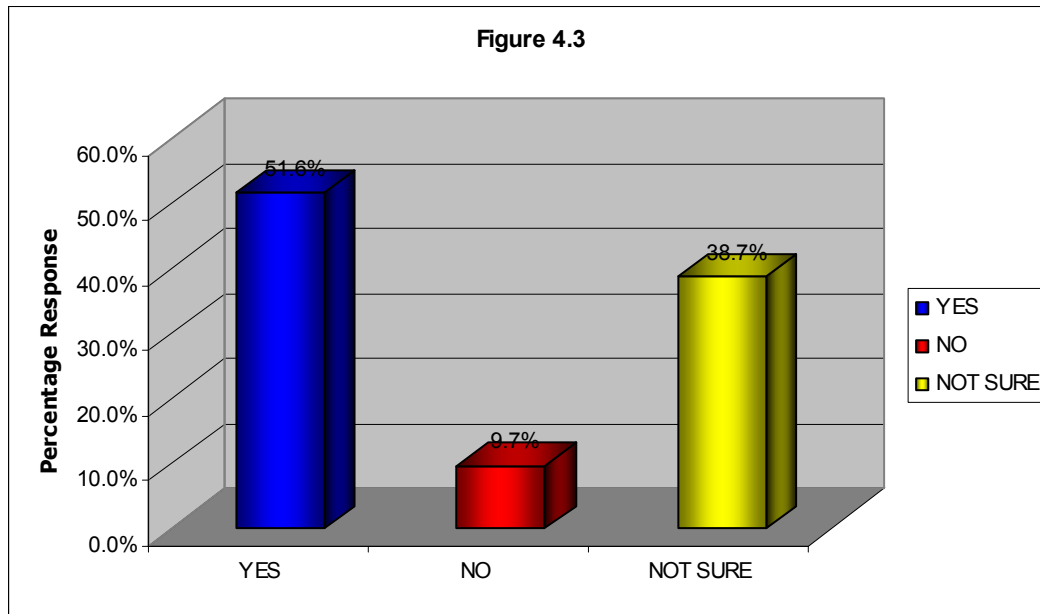
The general distribution of the responses to the question under consideration represented in [Figure 4.2](#) above, suggests that staff members are generally, although not overwhelmingly satisfied, that the implementation team addressed the store requirement effectively through the design process. For those respondents that indicated "yes" involvement in the user groups was allowed, the opportunity to not only understand the requirement but to ask questions around why certain functionality was excluded. The understanding that additional functionality comes at a cost and has an impact on budget was also discussed at these sessions. There is enough evidence to suggest that communication between the implementation team and stores took place.

Where respondents indicated "No", the feedback reflected a sense that the system could still be improved. Food stand alone stores would prefer information that is not food related to be filtered and that they receive too many non foods related correspondence. Some respondents also felt that there was still a fair amount of duplication in the communication going to stores, whether on the system or through email and that this should be investigated further through some form of content management exercise. It is also evident from the survey responses that those not involved in user groups did not always have the context as to why certain functionality was not considered.

4.4.3 Research Question 3

Do you believe that the Implementation team addressed the head office requirement effectively through the design process?

Figure 4.3 – Graphical representation of responses to Question 3



In this question, sixteen respondents felt that the store requirement was addressed effectively, three said “No” and twelve were unsure. In this instance, 51.6% felt the requirement was addressed, 9.7% annotated “No” and 38.7% were unsure. It is also important to note that from the respondent list, five respondents were from Head Office and twenty-six from stores.

Explanation of Findings Represented in Figure 4.3

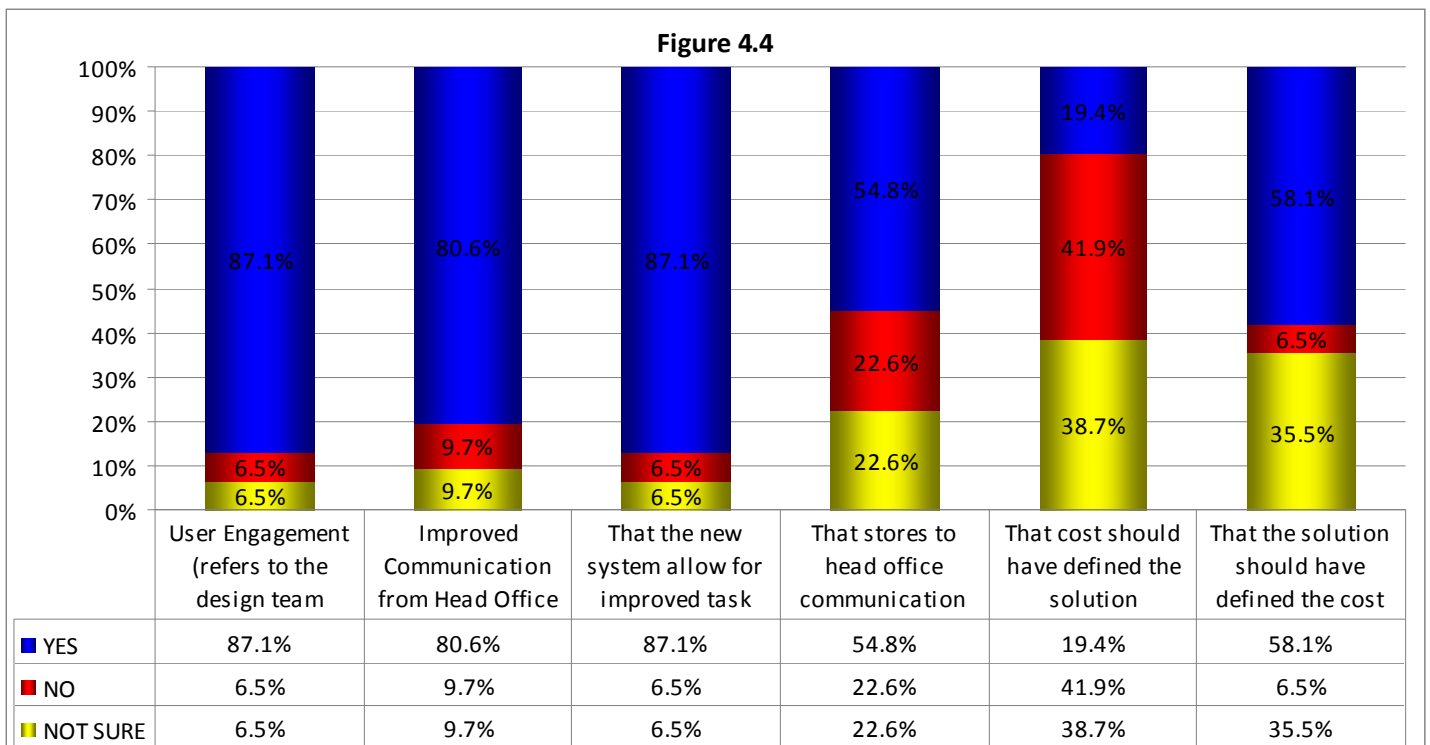
What is interesting from the survey results depicted in [Figure 4.3](#) above is that a large part of the store staff responses believed they understood the Head Office requirement and that it was addressed in the implementation process. It is also apparent that the head office functionality requirement was also governed by time and budget and that the opportunity exists for further improvement.

4.4.4 Research Question 4

*Do you believe the following **key considerations** should have been taken into account for the SharePoint implementation?*

The above question was broken down further into six sub questions that required “Yes” or “No” responses. The research as annotated the response results in the table [Figure 4.4](#) below.

Figure 4.4 – Survey Results on Key Considerations Sub Questions



Explanation of Findings Represented in Figure 4.4

In [Figure 4.4](#) above, the responses indicate and support that key considerations regarded as critical success factors for the store portal implementation were in fact considered. The response around user engagement indicates an overwhelming 87.1% positive response. This in turn supports the results of the

follow-on questions around improved communication and task management to stores with an 80.6% and 87.1% positive response respectively.

The results of the survey around store communication back to Head Office reflect a less positive result of 54.7%. So whilst communication has improved across the environment, there seems to be an opportunity around improving the feedback loops or communication to Head Office. As the system is relatively new, users feel that the system is still to be tested completely. Once again, a number of store-specific points were raised around what is deemed as required feedback from stores when other forms of correspondence such as email still exist on similar subject matter also requiring responses.

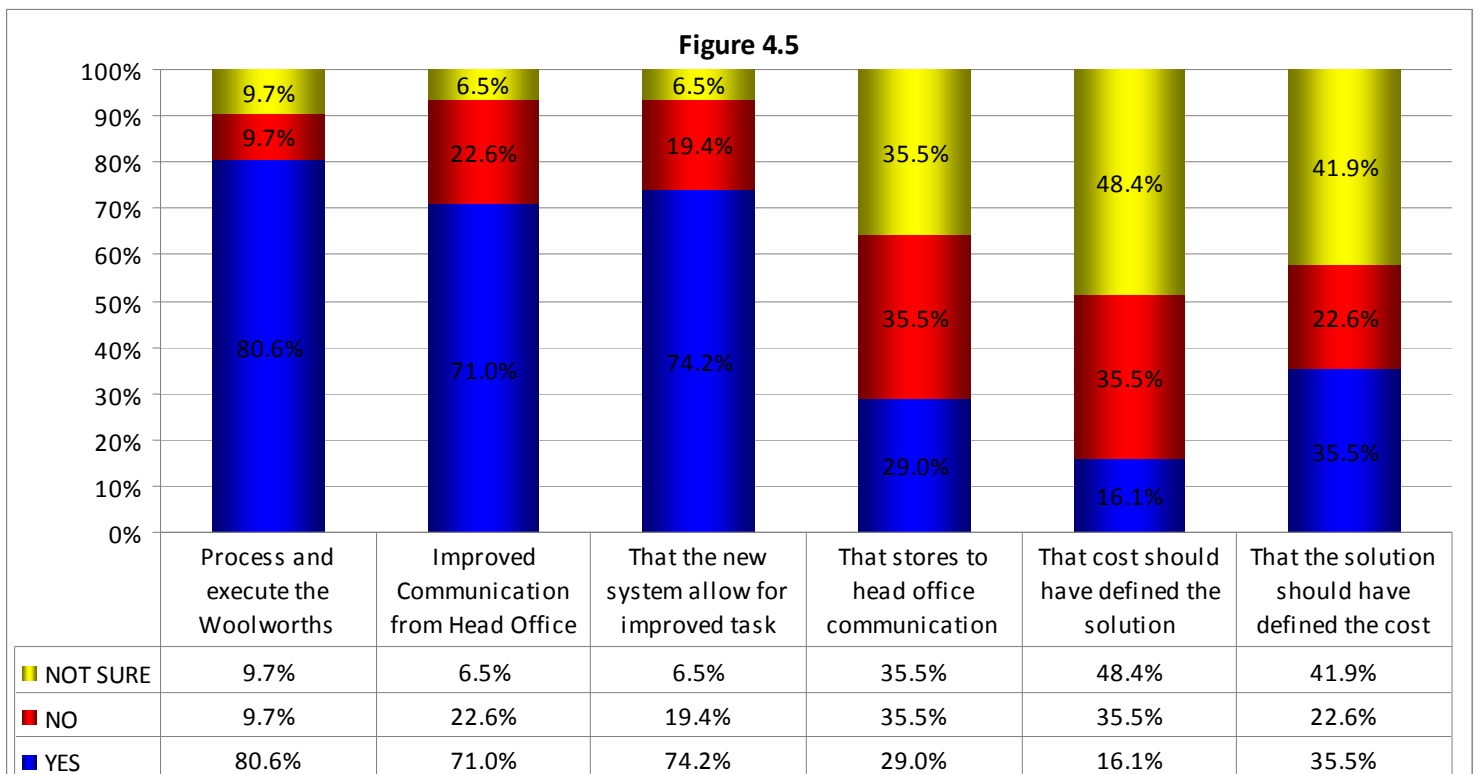
The last two questions which reflect on the cost versus the solution, based on the response seem to be less understood. Both these questions delivered a 38.7% and a 35.5% unsure response respectively. A response of 41.9% responded "No" to the cost should have defined the solution. This can also be interpreted as respondents indicating that should budget constraints not have been an issue, the solution should not have been designed around cost but rather ensuring that the full business requirement should have been met. No further detail was provided but the researcher would like to indicate that this could be around functionality, user interfaces as well as system aesthetics.

4.4.5 Research Question 5

The following question was divided into a further six sub-questions the responses on which are represented in [Figure 4.5](#) below.

Do you believe that the new SharePoint (Store Portal) solution has delivered the ability to?

Figure 4.5 – Survey Results on SharePoint (Store Portal) Solution and Communication Improvement



Explanation of Findings Represented in Figure 4.5

The response to this question, as expected, followed the trend as represented in section 4.4.4 with respondents confirming that the store portal solution, using Microsoft SharePoint as the framework, delivered an improvement on the existing communications environment from Head Office to stores. The majority

of the respondents felt that the Woolworths strategy could be processed and executed more effectively through the solution (80.6%) whilst 71% of the respondents felt that communication from Head Office to stores had improved.

A number of respondents (74.2%) felt that the solution allowed for improved task management. Once again, it is apparent that store communication to Head Office using the store portal as the means of communication is not ideal. It is apparent from these results that head office management need to either:

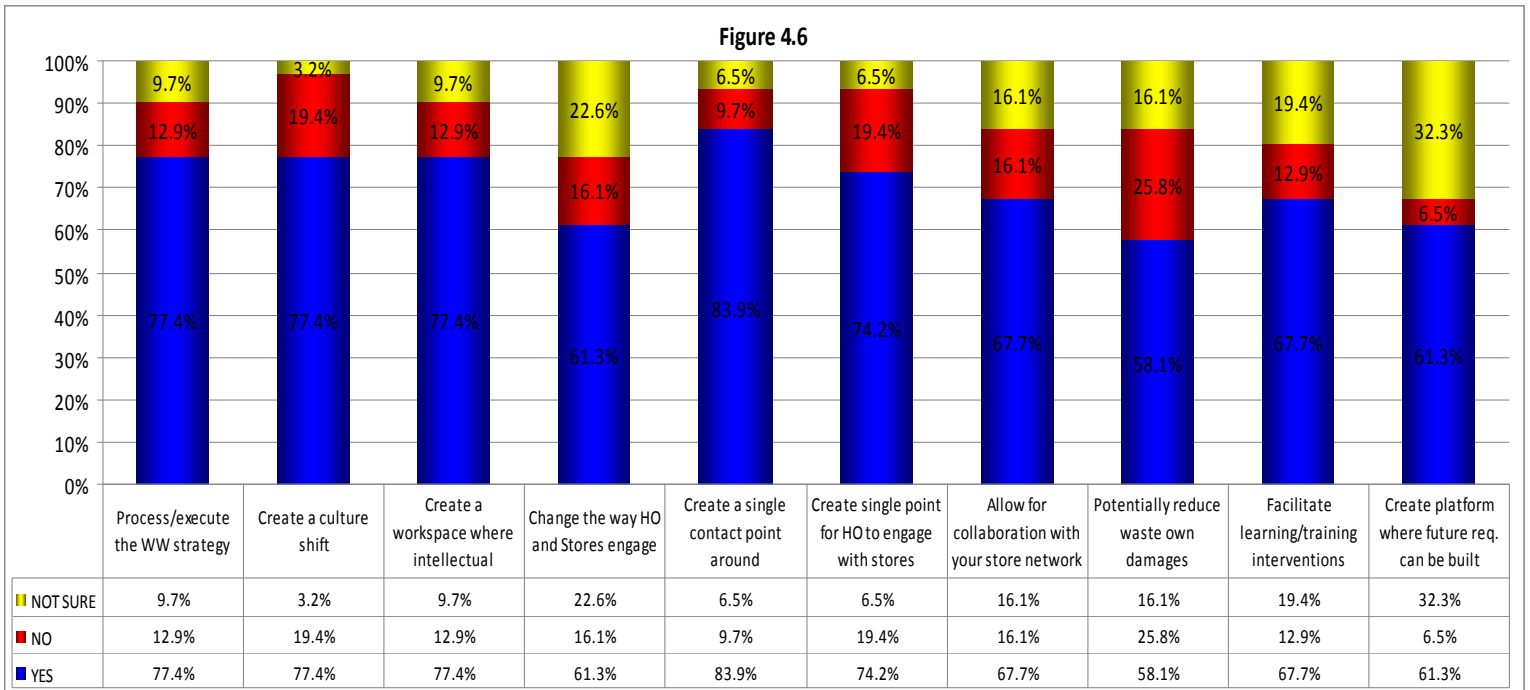
- Communicate the intent of the store portal to stores or
- Address the gap in functionality so that stores can use tool (store portal) for stores communication back to head office
- Confirm process and tools to be used in this instance, for example mail

4.4.6 Research Question 6

The following question was further divided into a further ten sub-questions the responses of which are represented in [Figure 4.6](#) below.

Do you believe that the new SharePoint (Store Portal) solution has delivered the ability to meet business requirements?

Figure 4.6 – Survey Results on SharePoint (Store Portal) Solution and meeting business requirements



Explanation of Findings Represented in Figure 4.6

The general distribution of responses to the statements under consideration suggests that the business requirement was met with the implementation of the Woolworths Stores communications portal using Microsoft SharePoint. Responses to the questions around strategy execution, creating a culture shift and creating an intelligent workspace all delivered overwhelmingly positive results (77.4%). The response trend remains in line with previous survey responses that the solution has met the business requirement, improved business decision making and ultimately the presented business case.

Of particular interest is the (61.3%) response on changing the way head office and stores engage with each other. Although still positive, the result potentially reflects the ambiguity that exists in how store staff are perceived to communicate back to head office. Another notable result is the (67.7%) positive

response with regards to collaborate within the store network and regional managers. Although the result is not overwhelmingly high, this could be attributed to store staff still getting to know the system and how it integrates with regional management and other stores.

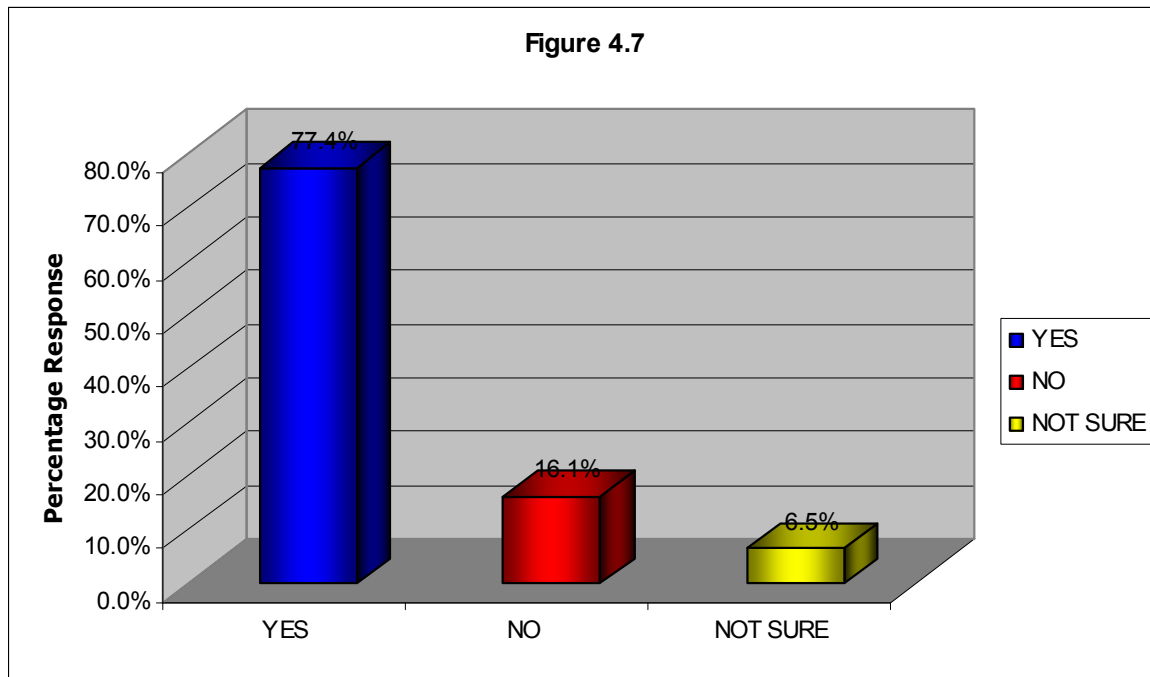
The result for reducing “waste own damages” (58.1% - Yes and 25.8% - No) highlights a potential business case impact or lack of understanding as to how the solution can reduce “waste own damages”. “Waste own damages” is linked to poor store process and ultimately the store portal solution was implemented to improve key store processes through the embedded Task Management functionality. The respondents agree that the solution could be used to facilitate training (67.7% - Yes). Ultimately, the respondents felt that future requirements could be built on the existing platform (61.3%) which indicates that the solution potentially provides a sustainable component to it and in turn would deliver a return on investment by “sweating the asset” even further, i.e. using the existing platform to improve process as well as create new functionality on an existing platform and not redesign the existing solution through the implementation of a new systems application.

4.4.7 Research Question 7

Do you believe that the SharePoint Solution is sufficiently intuitive (easy to understand and navigate) in order to manage the various day to day activities within your store?

The responses to this survey question represented in [Figure 4.7](#) below, support the results of the previous questions as 77.4% of the respondents believe that the solution is intuitive and would assist them in perform key “managed” functions within the stores.

Figure 4.7 – Survey Results on whether the SharePoint Solution is sufficiently intuitive

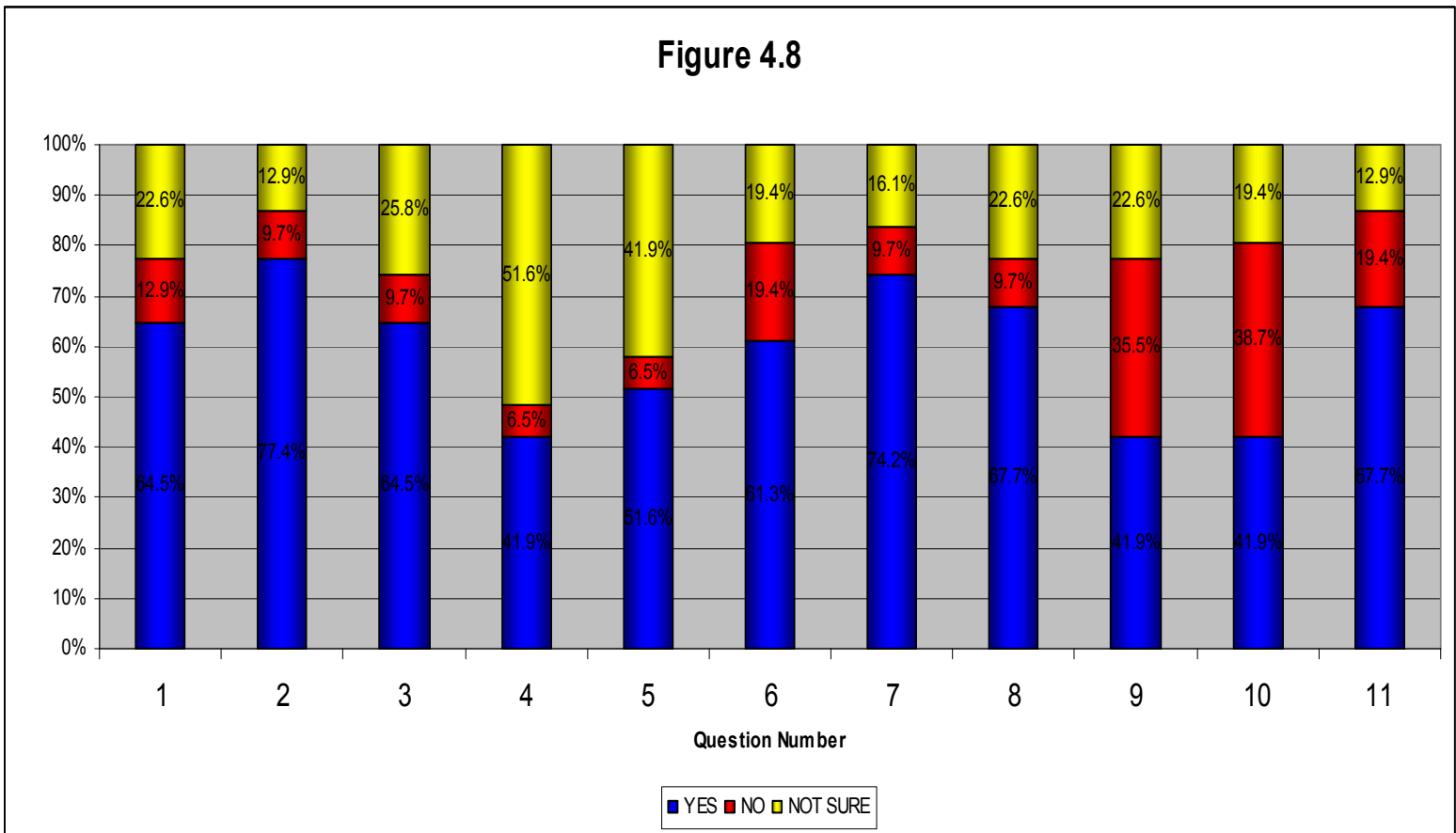


4.4.8 Research Question 8

As highlighted in previous chapters where the questionnaire design was discussed, this question was a catch all question aimed at distilling an overall measure of respondents' perception of the solution. The following question was also divided into a further eleven sub-questions the responses of which are highlighted in [Figure 4.8](#) below

Where do you believe the Communications Portal solution has delivered/not succeeded?

Figure 4.8 – Survey Results on SharePoint (Store Portal) Solution and understanding where it has met/not met the business requirement



Legend for Questions represented in Figure 4.8 above

- Question 1 - It will give Woolworths the competitive advantage
- Question 2 - It provides a secure environment for Store Managers to operate in
- Question 3 - I believe the solution is world class
- Question 4 - It will deliver a return on investment for Woolworths
- Question 5 - It has impacted our business positively
- Question 6 - It has allowed me to become more productive
- Question 7 - It has forced me to perform actions within the time constraints provided by Head Office
- Question 8 - It reminds me to perform tasks that I would have previously forgotten
- Question 9 - It is better than the previous communications process
- Question 10 - It performs the same as the old Imbizo (web) system
- Questions 11 - The system responds quickly

Explanation of Findings Represented in Figure 4.8

Based on the results of this part of the questionnaire, there is enough evidence to suggest that the overall business requirement has still been met, however there are some areas that require further analysis, interpretation and disclosure. These mainly include the Return on Investment question where (41.9%) agreed that Woolworths would have a positive return on investment but at the same time (51.6%) of the respondents being unsure. This could be by nature of the management levels within the sample size and the lack of understanding of how the business case was compiled and what the key metrics were in delivering a positive Return on Investment.

The question on whether the solution (Store Portal) impacted the business positively delivered similar results to the return on investment question. In this instance, (51.6%) of the respondents felt that the solution did impact the business positively whilst (41.9%) were unsure. In this instance, the feeling that solution has not been in use long enough to influence those who are unsure should be a consideration.

The one question that has highlighted a less than positive response when compared to other questions is the question on whether the solution is better than previous communication processes. In this instance, (41.9%) of respondents felt that it was better as opposed to (35.5%) who felt it was not. Once again this question delivered a fairly high unsure rate of (22.6%) which could be attributed to a couple of things which have been highlighted through the survey analysis process. These are:

- Content clean up and migration from the previous web system has not been properly delivered yet.
- Users have not had a long enough opportunity to fully utilize the system yet.

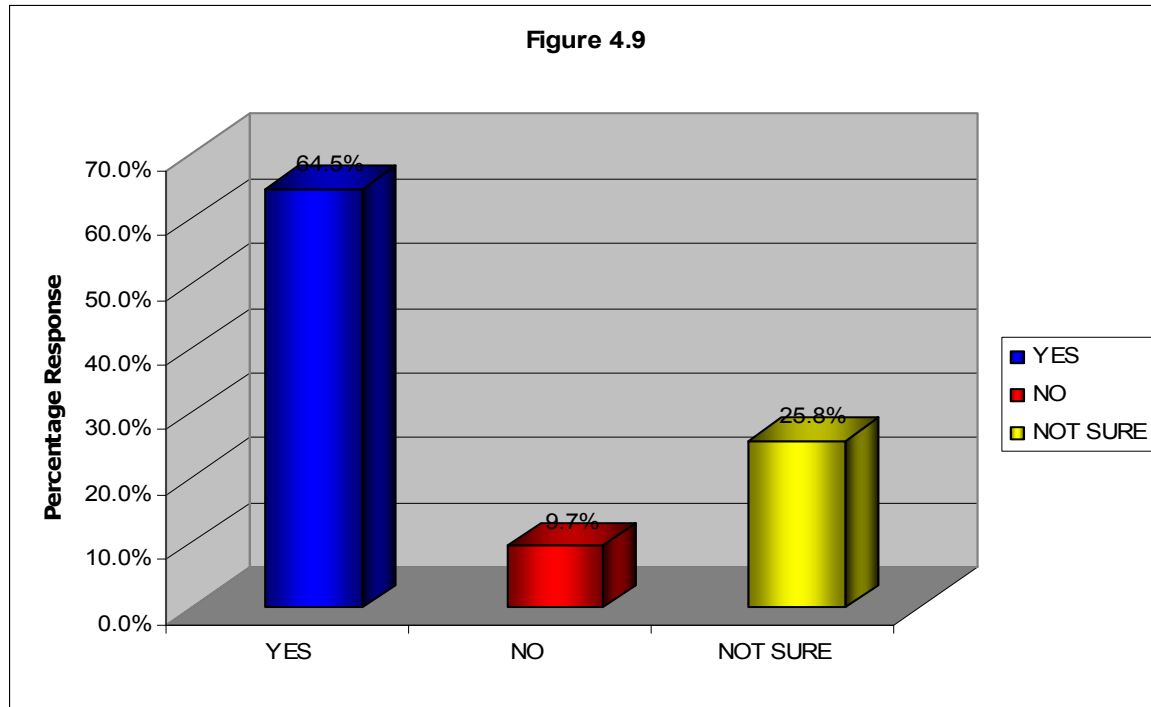
- The full extent of the solution offering has not been utilized yet.
- The expectation that content and communication reaching stores would be filtered and managed has not reached its desired state yet. Store staff complaining that email with similar priorities attached to it can create confusion
- Store staff feel that they interacting more with the system that before and as a result taking key staff off the sales floor
- Store staff are not seeing a big enough “difference” to the previous web based system
- Store staff feel there is a more “heavy handed” approach to measuring desired outcomes
- Store staff feel that the feedback loops or direct engagement with Head Office or relevant authors are not at the desired levels (irrespective of if this is the desired outcome for Head Office). This could potentially leave less opportunity for stores to express opinions unless it is in a structured environment such as a survey or discussion board.
- It potential highlight a gap or missed opportunity in the change management process

Overall, the trend of responses reflects similar results to previous questions raised and reaffirms the positive sentiment around the solution.

4.4.9 Research Question 9

Do you believe the new solution has improved store communication and task effectiveness?

Figure 4.9 – Graphical representation of responses to Question 9



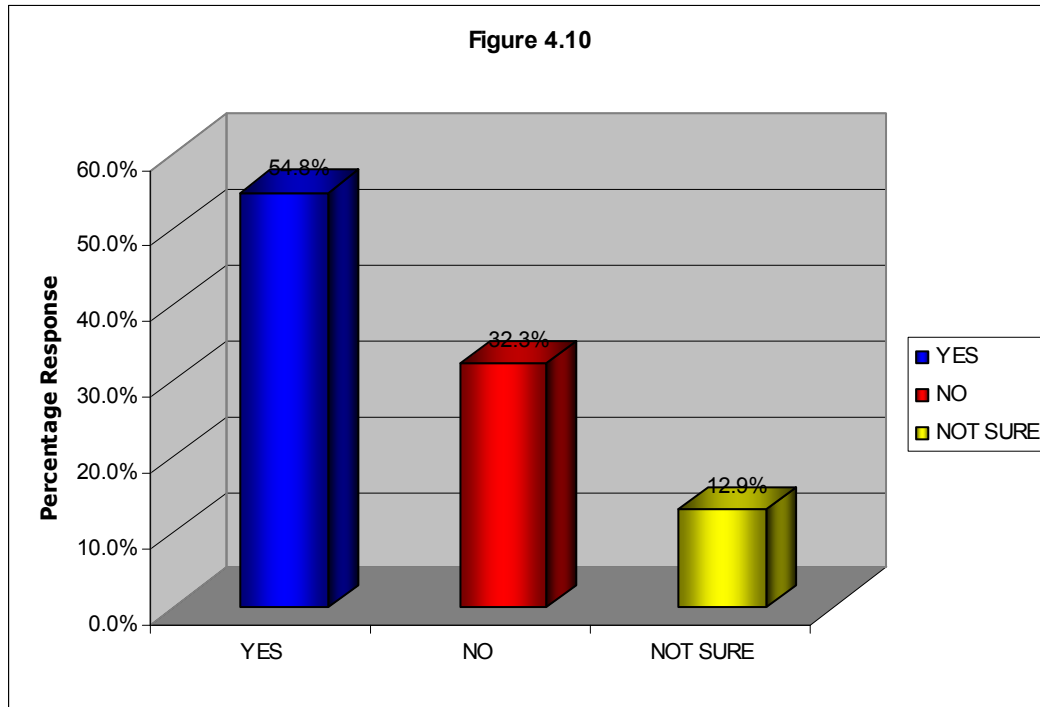
Explanation of Findings Represented in Figure 4.9

The results highlighted in this question as apposed to the one posed in question eight delivered a more positive result. As shown in [Figure 4.9](#) above, there was a (64.5%) positive response rate to this question where as (9.7%) responded negatively and 25.8% was unsure. Why respondents responded differently to this question can only be attributed to the fact that task management has been highlighted as an inclusion with communication effectiveness in this question. The sense then is that task management would assist store staff in not only understanding the priorities assigned to key store processes but to also assist them in the timeous execution thereof.

4.4.10 Research Question 10

Has the solution taken away the flood of communication from other sources in the business?

Figure 4.10 – Graphical representation of responses to Question 10



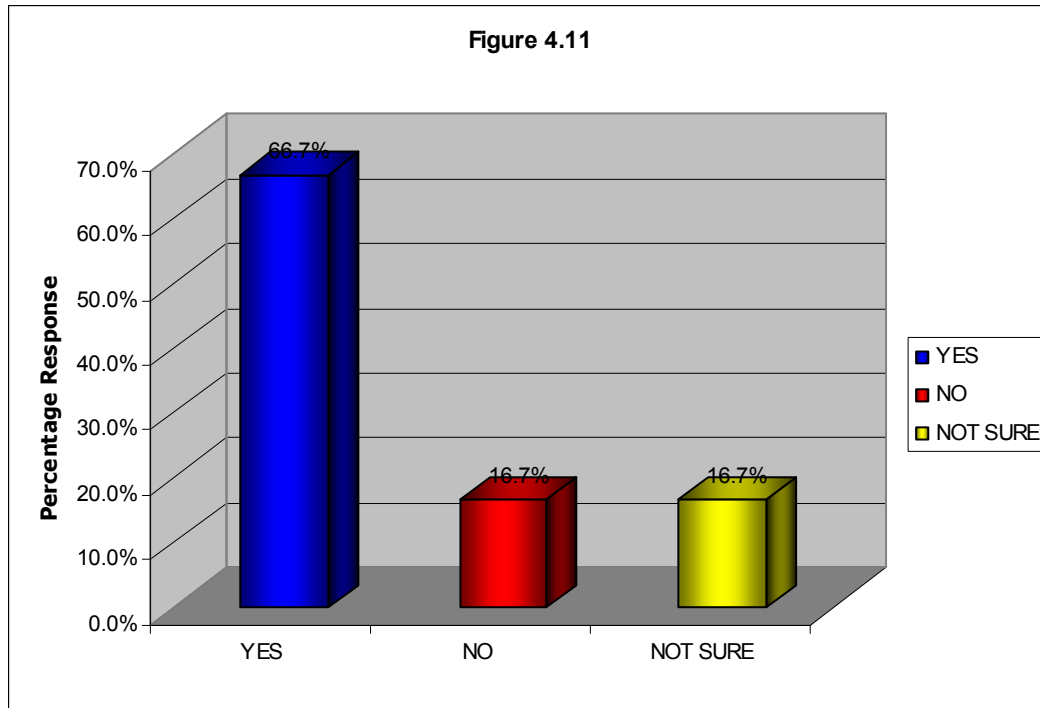
Explanation of Findings Represented in Figure 4.10

The concern around the solution **not** taking away the flood of communication from stores was raised again with the response to this question as shown in [Figure 4.10](#). Whilst (54.8%) felt it did, (32.3%) felt that there is an issue and (12.9%) were unsure. Once again the trend around communication content and the management thereof seems to be a concern that could be addressed. Stores receiving too many emails were mentioned.

4.4.11 Research Question 11

Would you change or add to improve the current solution?

Figure 4.11 – Graphical representation of responses to Question 11



Explanation of Findings Represented in Figure 4.11

In this question, a huge amount of respondents felt that there was room for improvement (66.7%), whilst those who responded “No” and were unsure shared a (16.7%) response rate.

The question strongly highlights the fact that there is opportunity for improvement in this solution. Comments around the following areas were made:

- There is an opportunity to design more effective **management reports** on data that exists in and linked to activities that take place on the system. This is linked to future activities that the solution will be used for going forward, i.e. surveys, discussions boards etc.

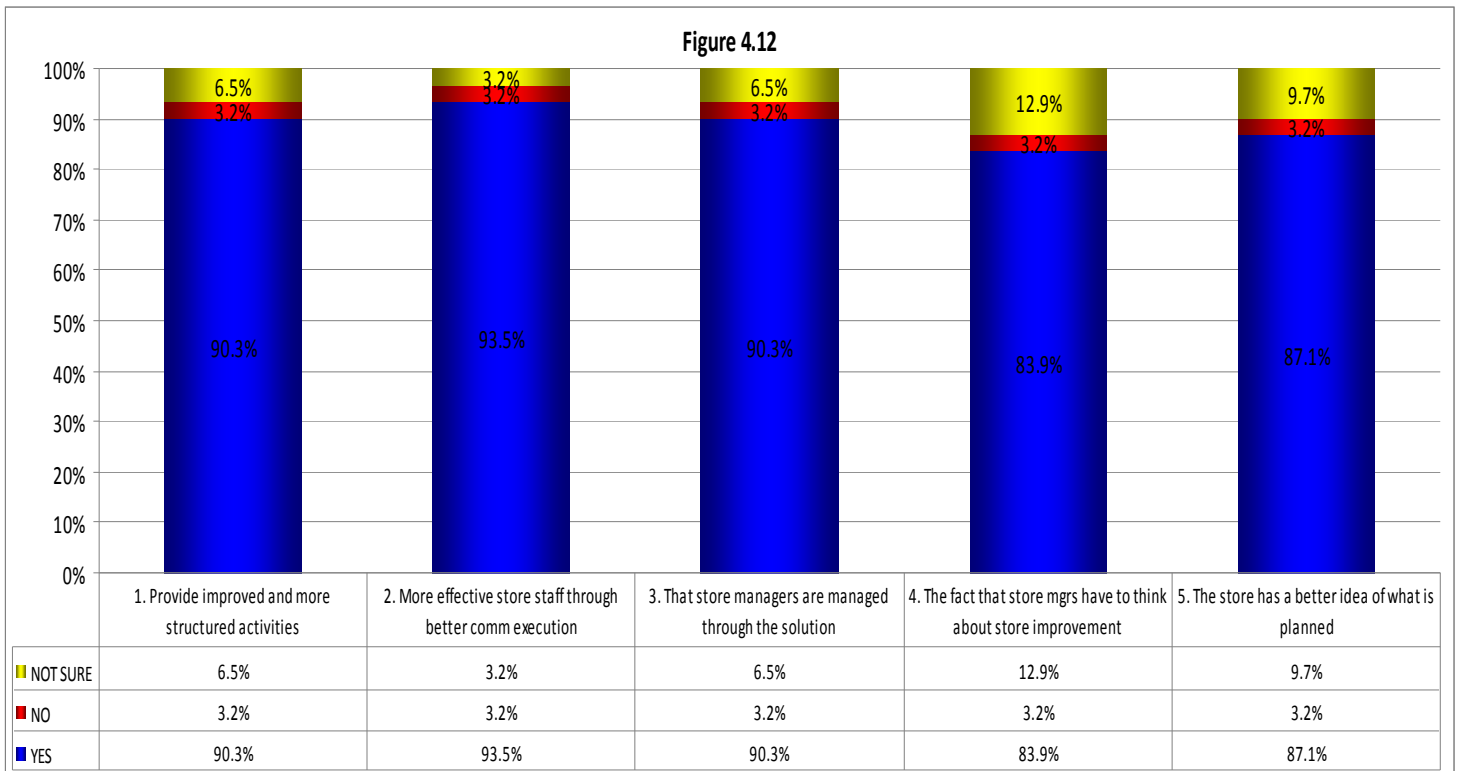
- The fact that users mentioned the opportunity to obtain “expense” reports from the solution shows potential lack of knowledge around the system design. The system provides an “interface” through intuitive links to other systems and hence a financial report cannot be linked to this solution offering but rather to the peer financial system it affects. Stores should be advised on how to channel these specific requests to the relevant “system owner”. Where the opportunity lies is potential to have these pre run reports posted on the portal for viewing purposes. This highlights a gap in the **change process** which will be addressed under the recommendations section in chapter 5.
- Some respondents felt that head office, group heads and franchise stores should have access to the solution and a process around **collaborative engagement** to potentially be set up. This could be around specific projects run in certain regions only. From a design perspective, Head Office felt that the creation of specific regional sites through the “My Site” offering within the solution was not considered as the view was that these “sites” will eventually become unmanageable and draw attention away from the main purpose.
- Those respondents, who are aware of what the SharePoint offering is capable of, felt that the “tool” was being **underutilized**.

4.4.12 Research Question 12

The following question was divided into a further five sub-questions, the aim of which was to test the respondents’ view around the solution providing a competitive advantage and ultimately a return on investment, the result of which are annotated in [Figure 4.12](#) below.

Do you believe this solution can provide Woolworths with a competitive advantage and if so in which way?

Figure 4.12 – Survey Results on SharePoint (Store Portal) Solution and whether it provides a competitive advantage to Woolworths



Explanation of Findings Represented in Figure 4.12

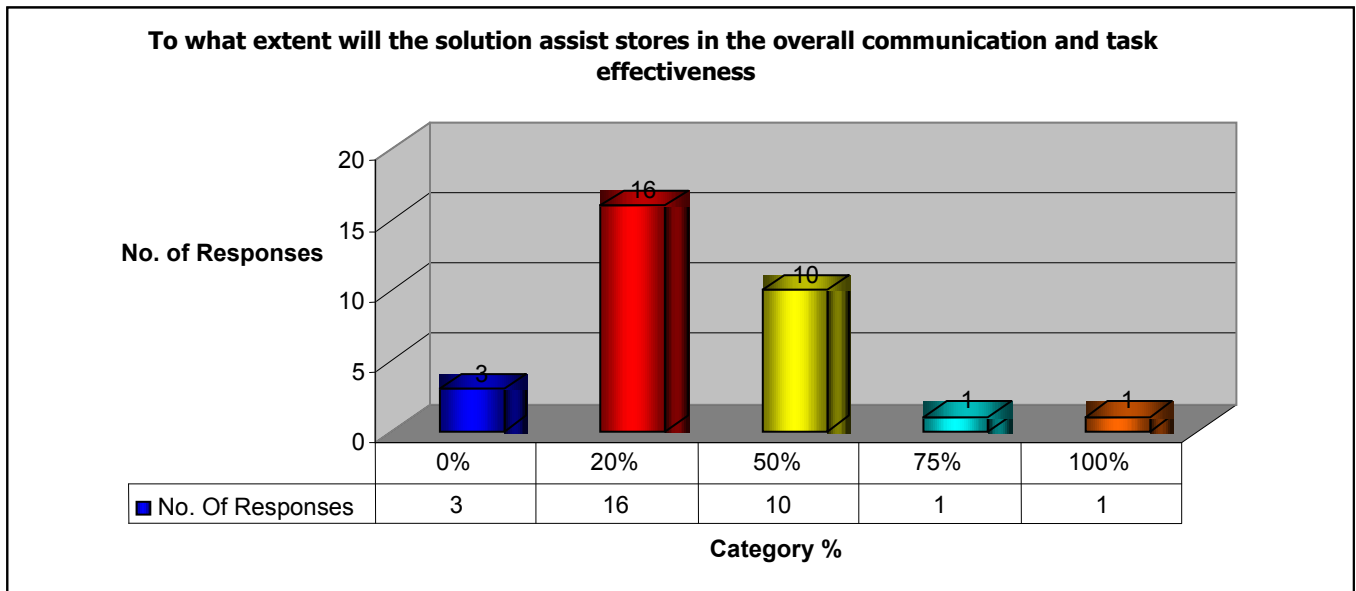
Across all the sub questions in this part of the survey, most respondents felt that the solution improved store activities by creating structure around specific store activities and campaigns. The results reflect that the solution assists store staff and management with task execution and allows them the opportunity to upload action plans which get managed by leadership and ultimately assists the store manager in making the store operate more effectively. Store managers are held accountable to the action plans that they upload and it gives visibility to leadership around store management initiatives and potentially best practice sharing amongst other stores through the regional manager who has sight to these plans. It is clear that the store portal (based on the above results) assists stores from a planning perspective and in turn would assist stores being more productive which is linked to the return on investment metric for Woolworths.

4.4.13 Research Question 13

This question was designed to determine to which extent the solution has impacted on store processes. The results are annotated in Figure 4.13 below and indicate number of responses per percentage area impacted.

Do you believe that solution will assist stores in the overall communication and task effectiveness?

Figure 4.13 – Survey results to test to which extent the solution will assist stores in the overall communication and task effectiveness.



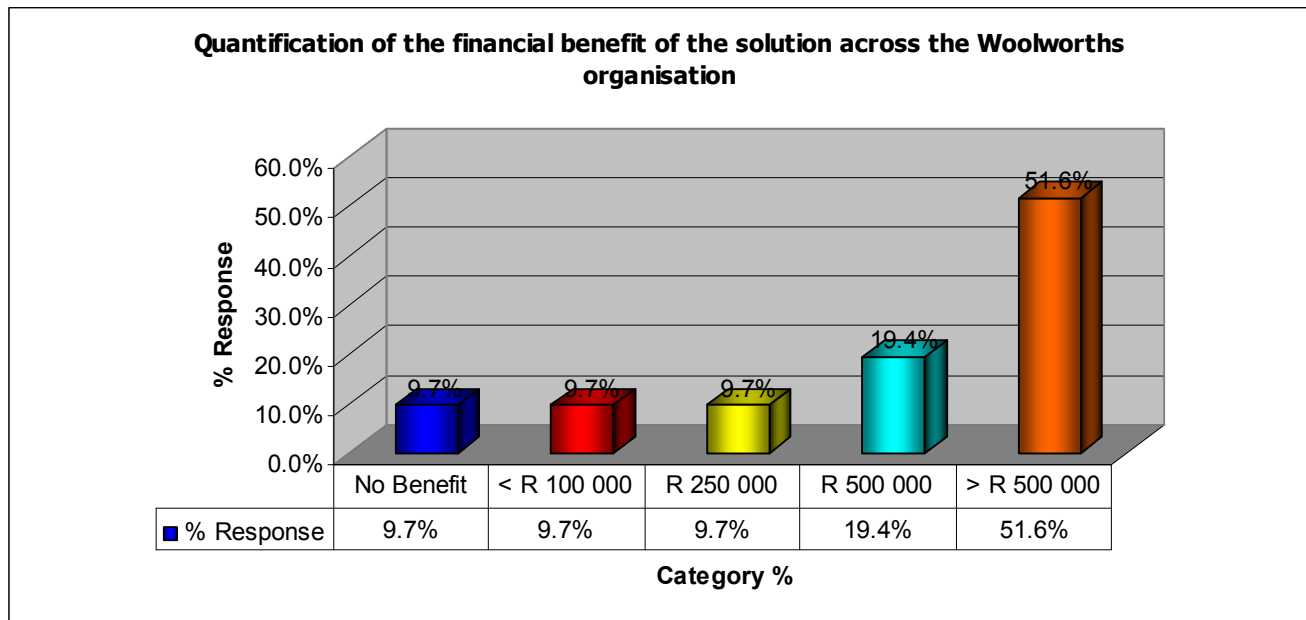
The respondents to this question indicated more of a middle ground when responding to this question. Whereas in the previous question where respondents indicated an overwhelming positive response, the articulation of the extent (in percentage terms) to which the solution assists stores in overall communication and task effectiveness seems to be mostly in the 20% to 50% range. This could be interpreted as being that although the solution will assist in making communication and task management more effective, its not 100% reliant on the solution to be effective in these areas.

4.4.14 Research Question 14

The following question was designed to test respondents view on the perceived value of the Return on Investment.

If you could quantify the financial benefit of the solution across the Woolworths organization what would you imagine the Rand amount would be?

Figure 4.14 – Survey Results on SharePoint (Store Portal) Solution to quantify perceived Rand value benefit across the Woolworths organization.



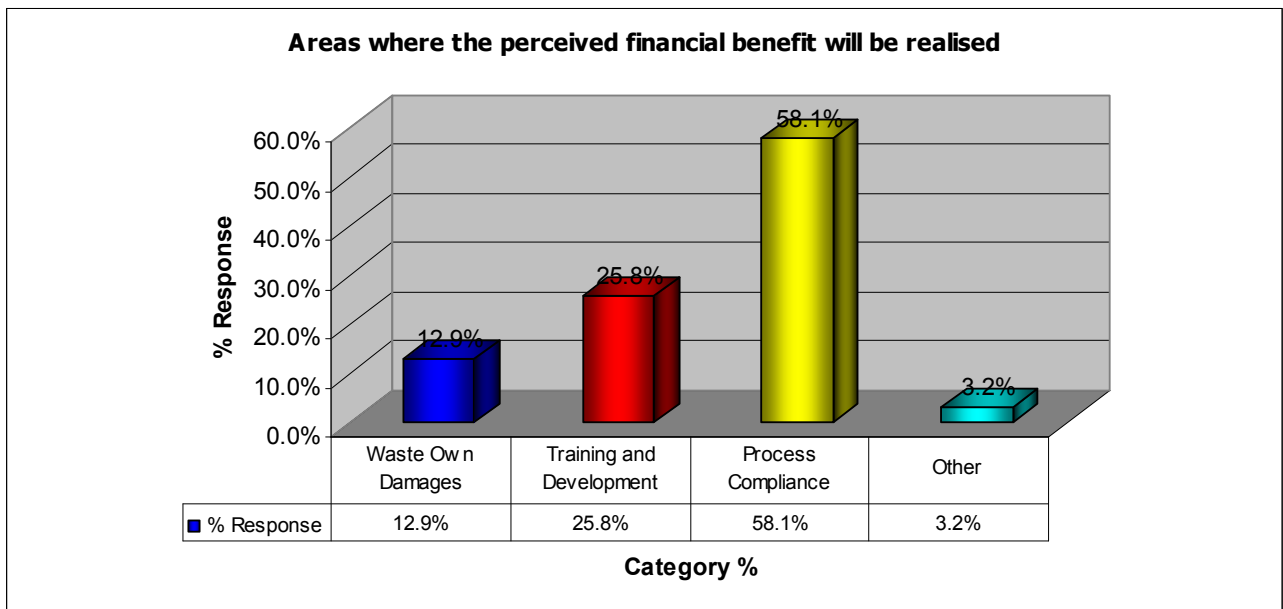
The responses depicted in [Figure 4.14](#) above depict an alignment to previous questions around the value add and competitive advantage. In this instance, the results reflect that most respondents felt a positive Rand value benefit could be attached to the solution, (51.6%) above R 500 000 and (19.4%) in the R 500 000 category. Between these 2 categories, (71%) of the responses are covered.

4.4.15 Research Question 15

The following question was designed to test respondent's view on which areas they felt the perceived value of the Return on Investment was. The results have been annotated in [Figure 4.15](#) below.

In what areas do you believe the above financial benefit will be realized?

Figure 4.15 – Survey Results on SharePoint (Store Portal) Solution to determine in which area the financial benefit of the solution will be realized



The responses to question fifteen above indicate that the majority of the respondents feel that the financial benefit will be realized in improved productivity through process compliance (58.1%). This once again is in line with the trend discussed in previous questions. There is an opportunity for management or implementers of the system to look at how the solution could be used for other learning interventions as (25%) of the population believe there is an opportunity in this area.

4.4.16 Research Question 16

What do you believe the critical success factors are in the implementation of a store communication portal? (This question tests the **overall objective** of the research study)

This question merely requests respondents to provide some form of comment around what they believe the critical success factors were with the implementation of the Store Communication Portal. The feedback received was captured as follows:

- System must be intuitive enough and reduce workload but increase visibility of key deliverables. The available time must be translated in additional commercial activities.
- Better training - information provided to trainers lacked answers to our questions. Current interface is slow, clumsy and not particularly user friendly all of which deter people from using what has the potential to be a really great tool
- Head Office needs to ensure that correct tasks reach the targeted audience so that 100% process compliance can be reached.
- There should be a business requirement that ensures the same message reaches all stores including Head Office users.
- There is an opportunity to test and explore greater interaction and participation of ideas, including new ventures thereby allowing stores to add more value and raise any concerns.
- There is a requirement for more in depth training for staff members. They use the system daily but feel they might not really understand the system 100%, which could have a negative impact on the financial benefit of the system.

4.5 Woolworths Management Interviews

4.5.1 Overview

Internal structured interviews were conducted with selected Woolworths Management. The selected sample provided a full representation of the primary roles within Woolworths that had either a direct impact or were affected as a result of Store Communication Portal implementation. These also included interviews with the Chief Information Officer (Division Director of IT – CIO), the Head of Stores, the Administration and Process Manager for the Franchise Division and the Head of Technology.

The research used the structure and related questions that were part of internal survey to obtain consistency and alignment in the interview process. As a result, the aim of the interview was to assess the understanding of the solution, the key links to business imperatives and highlight any critical success factors mentioned by the interviewee.

4.5.2 Analysis of internal Woolworths management interviews

As mentioned in the overview above, the responses to questions can be summarized into 3 main categories. These are:

- Assessment of the solution and implementation
- The key links to business imperatives
- Highlighted critical success factors

4.5.2.1 Assessment, the solution and implementation

Respondents expressed the view that the Store Portal (SharePoint) is proving ground for future business implementations around communication and collaboration. There has been very little negative feedback around the functionality with regards to solutions delivery.

Respondents also felt that not enough stakeholder engagement took place and that the approach to engagement was too high level. The Franchise Division felt left out of the process and believe that they, with the franchisees, would have seen huge benefit had they been included in the engagement workshops as well as been part of the initial roll out. The Store Portal would have created one vehicle for all, as franchisees are subject to the same store policies, procedures and tasks that corporate store are. SharePoint was decided on by the Selling leadership team, it was driven from the top structures within Selling where the influence on stores is end-to-end. Therefore it had the right leadership drive, but probably not enough stakeholder engagement. Whilst presentations took place to selected groups, not enough time was spent on obtaining impacted parties input. There were missed opportunities to engage deeper with the Finance department (store profitability statement, store scorecards).

The same can be said for the engagement with the Human Resource department as not enough time was spent to understand how the platform could support the "Let's Talk" process which looks at how management and staff engage with each other. It was a leader driven rather than an all inclusive process. Therefore leadership designed what they believed they needed. There is a feeling that the leadership "top down" approach design from the central team was the ways of working they had in place at the time. A lot of time has been spent on improving this approach in the interim. As a result, a move towards empowering store management to make decisions especially around Woolworths Selling strategic drivers such as unleashing the merchant, process simplification and employment proposition.

There is the common view amongst interviewees that that store management is more effective as a result of the implementation. However Head Office management still relies on store management to communicate further down the

line to store staff. They did not agree on a way of working as to how they were going to use the Store Communication Portal.

The Selling Division felt that it has met approximately seventy-five percent of the Store Portal implementation requirement and that with the second phase release more time will be spent on understanding the “as is” environment, how Regional Managers are using the system and what type of benefits are they obtaining there from besides the “known” one’s that have been communicated as part of the initial business plan.

Respondents feel that the system has delivered “technically” to the business requirement, however there is an opportunity to use it more effectively. This was a deliberate part of the implementation plan as the Selling “culture” was in a state of change and they wanted stores to have access to the new solution and use the opportunity to understand what it offers and how it fits into existing solutions. This would allow for best practices to emerge and in the subsequent months apply those learning’s consistently across the impacted areas.

4.5.2.2 The key links (objectives) to business imperatives

Respondents felt that the objectives around improving communication and task execution have improved and that the efforts to reduce mail, improve communication standards and protect the customer through process compliance has been realized, but more can still be done. There is a need to improve disciplines around communication being sent to stores from Head Office. Since implementation the opportunity always existed to do more. This highlighted the lack of proper end to end change management process, missed opportunity to create more visibility and awareness and obtaining acceptance into the whole design and implementation process beyond the user community.

Within a corporate environment, you have to start off with the understanding of what the potential cost of an implementation of this nature would be in order to get it past the business planning process. There is a definite sentiment that SharePoint is an enabler to management decision-making and a single contact point to the management of tasks. In other words, improved productivity through process compliance. The effective use of discussion boards to drive a Financial Services campaign was an example provided of how the system could be used effectively. Stores were asked what initiatives could be looked at in order to drive store card campaign targets. The outputs of this discussion board were used to finalize a business brief for store card campaigns. It resulted in the most successful uplift in store card the Selling Division has ever had.

Respondents felt that we have delivered the ability to execute the strategy more effectively through the Store Portal, but to a limited degree. Any process that improves communication and engagement will improve the effectiveness of the implementation of the strategy. However it is still a one way process to a certain degree. For example, the central office communicating their requirements, expectations and tasks to stores is a one-way process. How to leverage the tool more effectively to obtain better input from stores and in turn influence the strategy timeously still needs to be addressed.

There is also a sense that no "system" can really create a culture shift, but rather that leadership takes accountability for this through understanding what the current culture is and what they want it to be. The system is rather an enabler to the culture shift.

Ultimately, respondents felt that store managers are definitely more productive, and that there is less of a "shotgun" approach to communication through it being more structured. It has facilitated easier management and measure of tasks.

There is an opportunity to “sweat the asset” further using the tool to assist with project management.

4.5.2.3 Highlighted critical success factors

Respondents felt that from a task perspective, Woolworths has improved its ability to manage risk more effectively and in turn protect the company’s reputation and brand. Head office and stores are more aligned to what is happening in the business and is a definite improvement from the previous portal (Intranet). Head office is making sure that everybody is acting on their instruction and can see that communication is reaching the intended audience. Store management needs to be disciplined around task execution, however the consensus was unanimous that the Store Portal with task management was the first step in a lengthy journey to improve store communication. The current solution (phase 1 of the implementation) does not necessarily giving stores the ability to engage with each other.

There is a sense that Woolworths could be the first SA retailer to use SharePoint and task management to this extent. Respondents felt that ongoing focus around measuring content from HO to stores is important and even more critical that Woolworths franchisees are exposed to the solution, especially when running store campaigns. Currently there are people within Franchise division that have to track responses to specific requests which is counter productive. This will make the franchise General Managers more effective as franchise division has a small team with a large number of stores.

There has to be proper training on how the system works and initially not to flood it with too much communication and action plans. Where divisions have used the platform more effectively to drive the Selling agenda (Division 3 given as an example) the opportunity should be given to those divisions to share their knowledge amongst other divisions. This can be done through

- Understanding the “as is” solution
- How are store managers and regional managers using it?
- What type of benefits are these managers getting through effective use of the tool?
- What were they expecting or hoping to get which they did not obtain.

Respondents felt that the system was designed to be expandable and scalable which allows the solution to be more sustainable. Whilst it was originally intended to manage workflow and process compliance its value now also resides in its ability to support the new Selling way of working. The view was also expressed that the Store Portal can be a key enabler for the current “Let’s Talk” methodology.

As a counter argument, one respondent also mentioned that all systems are enablers and if you do not fundamentally change your business processes and ways of working, what a systems solution can deliver in itself is limited. So whilst the business has significantly moved the communications portal forward, Head Office and Selling still have not amended their ways of working in it’s entirety to align to the principle of having one central communication repository. For example, there is still communication going out from Head Office to stores as it previously did outside the Stores Portal. Divisions within Head Office have not yet understood how one can use the system to task manage key commercial events such as foods promotions and the setting up the Christmas gift shop. There is an opportunity for the Selling Division to influence this with other Head Office divisions. This does highlight the fact that the solution was implemented first before the revised ways of working and business processes outside the Selling Division were implemented. There was a missed opportunity to implement the new system and ways of working simultaneously.

As a result of costs being limited with the implementation of the Store Portal solution, the feeling exists that the payback period and return on investment will be quick and substantial. The opportunity exists to extract a better return on investment over time once the best practices relating to corporate business processes have been defined more extensively (as mentioned in the previous paragraph). With the implementation of the solution, Selling Head Office structures were rationalized and this also delivered a cost saving to the business. This was done in conjunction with the savings that were delivered through process compliance with initiatives such as food stock accuracy, compliance to "Red Flag" processes and asset protection.

From a task management perspective, the views expressed reflected a low impact and benefit at this stage. It is still only targeted at store managers whilst a huge amount of work is driven by the group heads and departmental managers who do not have access to the task management side of the Store Portal. It is difficult for store managers to cascade tasks automatically and this would provide an improvement opportunity for the future. The second reason provided supporting this was that not all the content was migrated from the previous Intranet system into the Store Portal (SharePoint). The Selling Division therefore had not had the opportunity to streamline the content or implement version control and hence the new Store Portal in some cases, just provides a link to existing business information residing on the old Intranet. Until such time that the content has been migrated, consolidated and applicable to more users through applied best content management practices the Selling Division cannot drive other aspirational initiatives they would have liked to have.

The highlighted critical success factors were:

- Stakeholder engagement is key to ensure full buy in from all business areas up front

- The adoption to the new ways of working which leadership drives through the various areas of the business
- Obtaining balance between stakeholder buy in and timelines of implementation
- Redefining the business processes is an imperative to a solution that is to deliver value add and return on investment
- Ensuring that these business processes are aligned to the solution you are implementing
- There needs to be monitoring and follow up around what is going well with the solution and what the opportunities for improvement.

4.6 Conclusion

Chapter four presented and analyzed the result of the research undertaken within the context of Woolworths and specifically the Selling and IT division who played a key part in the implementation of the solution.

The results of the analysis were contrasted with key implementation consideration derived through an analysis of research and experience as presented in chapter two.

The majority of the considerations were found to be valid in the Woolworths context with any additional considerations or significant deviations documented.

The following Chapter (Chapter 5) presents formal recommendations based on the findings in the preceding chapters.

CHAPTER 5: RECOMMENDATIONS

5.1 Introduction

The preceding chapters presented the literature review, research questions, methodology as well as the results of the study. The post implementation considerations and recommendations were derived through the research process and experience validated by the analysis of the research conducted specifically in the Woolworths context. This chapter provides recommendations for the implementation of a store communications portal against the underlying researched critical success factors.

5.2 Recommendations approach

The recommendations, although specific to Woolworths, are underpinned by generic principles outlined in the literature review documented in chapter two as well as aligned to the objective of the research discussed in chapter one. Such recommendations will be grouped into four key areas, which as mentioned, link to the objectives of the research. They are:

- Strategic considerations
- Solution design
- Business process
- Change management

In each case the validated implementation considerations and subsequent recommendations have been referenced to the key research objectives.

5.3 Strategic considerations

Leadership defines strategy and strategy guides an organization's execution. Therefore leadership focus is critical to ensure the success of any initiative the business undertakes.

In this regard, it is suggested that focused attention is applied to ensuring that certain business units excluded from the initial Store Portal roll out now be considered for inclusion. As revealed through leadership opinion when addressing the Franchise Division requirement, this was not an intended oversight however the protocols that potentially prevented its original inclusion should be addressed. The subsequent business plan can be validated through the findings outlined in chapter four which defines and supports business process optimization, increased store productivity and brand protection contribution.

With post implementation reflection, leadership opinion raised the opportunity to examine the business planning process and look for further improvement in trying to obtain a balance between stakeholder buy-in and implementation timelines. Although this could be argued as a change management issue, business unit planning processes are linked directly to the strategic planning process. By obtaining greater synergy in this regard and obtaining broader business buy-in, project deadlines are not compromised and business processes linked to the solution, be it directly or indirectly, can be improved upon which ultimately in the case of the store environment, improves productivity quicker. As mentioned in the previous chapter, the knock-on benefit would be that business processes (supporting the solution) are aligned to the solution you are implementing. This point talks directly to the "Lead our Customer" strategic driver which talks to having the ability to **swiftly respond** to business change with **robust solutions** and lead the business through **technology innovation**. This point is further supported by the strategic driver for "Sustainability" which ensures that all solutions and processes are aligned to business objectives and

governed through **clear architectural (system design) and commercial** principles. The opportunities around running food and Christmas gift shop campaigns were mentioned.

With the investment in the solution made, further investigation is required to understand how this asset (Store Portal) can be optimized or used more effectively for initiatives not originally highlighted in the business case. This can be done through a structured workshop which would also include stakeholders that were not part of the first implementation. A key point that was raised through the survey and interview process was the incorporation of the “Let’s Talk” methodology in the solution. Whilst one might argue that this specific point should be included in the Solution Design recommendation (section 5.4 below), this methodology has been given specific attention as a strategic driver under “People”. The intent of this driver/approach was to ensure that the business builds “real skill” and a delivery orientated culture using the “**Let’s Talk**” methodology/framework not only as an enabler to communicate strategy but also to facilitate **stakeholder engagement** across the business. This is congruent and supports the recommendations mentioned in this chapter.

Some of the recommendations which are linked to the strategic drivers are mentioned in section 5.4 below.

5.4 Solution Design

In terms of the outputs delivered through the research investigation in chapter four, cost will define what functionality is incorporated into a solution, not withstanding the fact that a prioritization exercise has to be done in order to determine what functionality is eventually incorporated. Depending on how the solution was designed, incorporating new functionality at a later stage speaks to the expandability and scalability of the solution which is a key principle of the design process and ultimately the Systems Development Life Cycle (SDLC). The

SDLC process associated with technology implementations includes five distinct phases: systems investigation, systems analysis, systems design, systems implementation and systems maintenance (O'Brien, 2004)

The inherent nature of implementations such as this always has a strong customer facing focus. In other words, from an Information Technology perspective, meeting the internal customer requirement is important and ties directly to the Information Technology Infrastructure Library (ITIL ®). ITIL ® is a public framework that describes Best Practice in IT service management. It provides the framework for the governance of IT and focuses on the continual measurement and improvement of the quality of IT service delivered, from both a business and customer perspective. The stages of the service lifecycle incorporate the initial definition and analysis of business requirements in Service Strategy and Service Design, through migration into the live environment within Service Transition, to live operation and improvement in Service Operation and Continual Service Improvement (ITIL ®, 2007). With reference to IT leadership opinion around constraints encountered with the deployment of hardware, software and the subsequent support an opportunity for the IT team exists to revisit these frameworks and apply them in a constructive manner with subsequent releases of Store Portal or overall SharePoint releases. This should be facilitated through a prior work group session where key role players align the customer requirement to Service Design and Transition processes. With the correct application of the SDLC and ITIL ® frameworks significant progress and enhancements can be made to future implementations and risks/concerns raised in the research around third part management/interaction, user interfaces, management reports and future releases could be mitigated.

The requirement around designing a collaborative workspace for projects within the solution continually surfaced through the research study whilst the concern around managing an "open" environment such as this may create an

unnecessary overhead. This subject should be raised as an agenda item in the post implementation workshop discussed in chapter 5.3 above and decision made on the practicality of the implementation of a requirement such as this. This should be considered against the overall SharePoint roadmap as Head Office requirement for providing this sort of functionality and ability becomes more apparent with future releases.

The opinion expressed around creating a more mobile workforce and ensuring that staff are engaging with customers and not sitting behind a desk for long periods needs to be addressed. The ability to access Communication and Task management portals remotely with mechanisms such as smart phones is becoming more apparent. SharePoint Mobi® is a product offering that is available that facilitates this kind of interaction with the system. This needs to be explored further taking into account within the suggested frameworks already discussed which will assist in the alignment of the solution design to the service delivery taking into account the Woolworths business agenda around cost vs. return on investment.

Ultimately, ensuring that these business processes are aligned to the solution you are implementing are critical and are discussed further in chapter 5.5 below.

5.5 Business Process

As mentioned in sections 5.3 and 5.4, the importance of business process and its eventual impact on the solution was profound. For example, the expectation that content and communication reaching stores would be filtered and managed has not reached its desired state yet. Store staff complaining that emails with similar priorities attached to it is creating confusion. Store staff is feeling that the feedback loops or engagement with Head Office or relevant authors through the solution offering are not at the desired levels (irrespective if this is the desired outcome for Head Office). This could potentially leave less opportunity for stores

to express opinions unless it is in a structured environment such as a survey or discussion board. The outcome of this is that redefining the business processes is an imperative to a solution that is to deliver value add and return on investment.

As is evident from the relevant post implementation considerations, validation of the IT support processes (besides the business processes already mentioned) is important. Collaboration and ways of working between the project, centralized infrastructure and third party application development teams proved to be a challenge. Whether the nature of these types of challenges could have been forecasted through the more rigorous application of the presented frameworks, will probably require deeper investigation however these known challenges now present genuine opportunities for refinement.

With future planned releases for head office and stores in the pipeline the suggested (SDLC and ITIL ®) frameworks along with best practice change management principles needs to be applied more rigorously.

5.6 Change Management

The ultimate success or failure of implementations of this nature is sometimes very dependant on the quality of the change management approach. It is clear through this research study that although the implementation was largely regarded as a success, missed opportunities as a result of a lack of proper change process will have to be reflected on. Some of these missed opportunities were:

- There was a lack of visibility before and during the implementation within the broader Woolworths business.
- As a result of the lack of visibility the success of the implementation was somewhat negated.
- The business processes (outside the Selling Division) has had a negative impact on the effectiveness of the implementation.

- The perception with some store staff around the solution being seen as a “heavy handed” management and measurement tool could have been mitigated upfront and not subsequently. Potentially understanding the true benefits of the solution may also have mitigated this opinion.
- The fact that users mentioned the opportunity to obtain “expense” reports from the solution shows potential lack of knowledge around the system design. The system provides an “interface” through intuitive links to other systems and hence a financial report cannot be linked to this solution offering but rather to the peer financial system it affects.
- Potentially providing store managers with a methodology/toolkit to manage tasks down to store staff without impacting on the loss of productivity perception
- Any fear of the technology or its interaction with it could have been addressed.
- Buy-in from role players who were considered to be out of scope may have presented alternative solution leveraging mechanisms (opportunities to use the solution for other business activities) or even collaborative funding for that matter.
- Business units who were not aware of the scope of the implementation or the benefits of the technology may have designed or change their business processes in order to integrate more effectively with the solution. (Christmas gift shop example).

With the exception of the direct strategies of cooptation and coercion (Robbins, 2003), which remain only a last resort and ultimately impact the efficacy of implementing a change and ultimately provide the mitigation of implementation change considerations related to the acceptance of change.

It is recommended for future SharePoint related rollouts that business communication and broader business engagement commence immediately at the

point of business case formulation, thereby creating awareness of the initiative and should continue throughout the implementation process to encourage buy-in and use of the solution in the operational environment. The appointment of an experienced change manager will assist any team involved in complex projects of this nature.

5.7 Conclusion

Chapter five provided recommendations based on the post implementation of the Woolworths Store Communications and Task Management Portal using the Microsoft® Office SharePoint Server application as the framework.

Four key areas were highlighted that were referenced back to the problem statement, research objectives and proposed strategic frameworks highlighted in the preceding chapters. These areas were strategic considerations, solution design, business process and change management.

The recommendations were presented in context of the Woolworths environment; however generic principles around systems design and change management are applicable to any environment. The following chapter concludes the research study by outlining the important research considerations and processes followed.

CHAPTER 6: SUMMARY AND CONCLUSION

6.1 Introduction

This chapter concludes by briefly outlining the important research considerations and processes that were followed. It summarizes the major findings and provides recommendations based on the validated post implementation considerations of a Store Communication and Task Management Portal for Woolworths.

6.2 Statement of problem

The specific research problem that was investigated in this research study was the determination of the critical success factors that were needed for the implementation of a store communications portal for Woolworth Pty Ltd (South Africa).

In support of the stated problem, four subordinate questions were investigated.

1. What were the key considerations or unique features for both store and head office managers when implementing a task management and communication solution for Woolworths within the framework of Microsoft SharePoint and overall Woolworths current architected technical environment?
2. What were the gaps and opportunities that exist in the current specified Woolworths automated task management and communication model when compared to the business requirement and best practice?
3. What was the impact on stores when implementing the improved business process monitoring tool using the Microsoft SharePoint framework?
4. Relative to the business requirements, did the implementation of the proposed store communication solution offer a strategic fit (strategic alignment) for Woolworths and offer a return on investment or a competitive advantage in the market place.

6.3 Literature review

The literature review in chapter two discussed the definition of task management and corporate communication. It also highlighted best practices in corporate communication and the potential impact/benefits of having a structured communications/task management model in place. It provided context as to how corporate communication should be organized and formulated a view on what the generic critical success factors would be in organizing and implementing the corporate communications model effectively.

After providing the definition of the communication model, the literature review provided context by reviewing the history of Woolworths and the subsequent requirement for an effective communication and task management systems portal. The business requirement was aligned to the underpinning Microsoft® Office SharePoint Server framework and a match at an applications level validated. The high-level rationale for pursuing this framework was examined from an organizational and IT perspective. Non-negotiable principles such as integration into existing organizational tools, enterprise solution scalability, facilitate the streamlining of business and communication processes as well as budget factors were presented as reasons for choice of application.

In defining the input for implementation considerations, best practice frameworks for the System Development and Project Life Cycle was discussed. This would provide context for any potential gaps (be it process or otherwise) that may have surfaced from the research investigation. Underlying the project methodology it was presented that a project support structure based on the PMI (Project Management Institute) knowledge areas – Scope, Budget, Time, Quality, Communications, Procurement, Risk, Integration, and Resources was important. Linked to this framework, the generic definition of a critical success factor was documented. According to Olsen (2003:10), a critical success factor is an element that has to be done well in order for the activity to succeed. Olsen also

mentions that user involvement in information systems is critical and clear lines of communication are also important.

Critical success factors for organizing corporate communication at a process level were reviewed. The formulation of an effective corporate communication/task management strategy ultimately delivers results from bottom line perspective, be it through improved process control or being able to action a task in the most efficient and effective manner.

6.4 Research method and design

Chapter three provided an overview of the phases employed as the research method in the study.

The researcher pursued a hybrid research approach that was both participatory and evaluative in nature. Evaluation research (implementation evaluation research) aims to answer the question of whether an intervention (programm or strategy) has been properly implemented and whether the target group has been adequately covered. Mouton (2005:158) The reason taken for this approach is that research presents a unique opportunity to assess the criteria against a predetermined “super user” group as well as the eventual intended users being store and divisional managers.

Data collection was achieved through two mechanisms in support of the questions defined in the problem statement:

1. Structured interviews with a select group of Woolworths leadership. The target group represents a sample of Woolworths Leadership relevant in making decisions and implementing new store solutions.

2. A survey to test Woolworths store management to the concept of task management as well as the factors linked to the success (or lack thereof) of the Store Communications Portal implementation

All input was consolidated and analyzed as described in chapter 4.

6.5 Results presentation and discussion

The purpose of chapter four was to validate the post implementation considerations defined through the literature review by analyzing the data collected.

It was validated that there was congruence between the Woolworths Strategic intent and the implementation of the Store Portal using the Microsoft® SharePoint framework and that it would eventually deliver a return on investment. The implementation for the most part was regarded as a success however, there were gaps and opportunities in the implementation process that needed to be looked at in order to make future releases to stores and head office successful.

The analysis of the internal survey results as well as leadership interviews highlighted the following:

1. Concerns within the Centralized Infrastructure team around code deployment constraints (hardware and software), engagement with third party vendor as well as future support of the solution
2. There was a lack of an end to end change management process
3. Broader business process and its alignment to the solution offering needed to be improved. This included the way communication reached stores from Head Office business units outside the communications portal as well as not being in a position to exploit the functionality to its full

potential. The lack of stakeholder engagement across the business upfront yielded this as a key area of improvement.

When reviewed in totality the analysis validated most of the implementation considerations defined in the literature review, however areas such as change management models, overviews of the Information Technology and Infrastructure Library (ITIL ®) public frameworks could have been explored in greater depth. This has been noted as a personal learning in chapter 6.8.

6.6 Recommendations

Recommendations were formulated on the basis of the validated post implementation considerations as per the analysis performed in chapter 4. The analysis, although specific to Woolworths, highlighted best practice principles that could be applied to any implementation of this nature. Recommendations were grouped into four key areas which linked to the objectives of the research. They were:

1. Strategic considerations
2. Solution design
3. Business process
4. Change management

6.6.1 Strategic considerations

It was revealed through leadership opinion that the Franchise Division requirement to be part of the new Store Portal solution should be addressed. The benefits associated to this are significant to the division and would add value from a work management and communication perspective. Leadership raised the opportunity to examine the business planning process and look for further improvement in trying to obtain a balance between stakeholder buy in and implementation timelines. It was recommended that optimization exercises be concluded in order to enhance the current solution which was not apparent when

the initial business case was concluded. Stakeholders not part of the initial implementation workshops should be included. It was also recommended that the “Let’s Talk” communication methodology be incorporated into the new Store Portal solution.

6.6.2 Solution design

It was recommended that an opportunity for the IT team exists to revisit public frameworks such as ITIL ® (Information Technology Infrastructure Library) and apply them in a constructive manner with subsequent releases of Store Portal or overall SharePoint releases. With the correct application of the SDLC (System Development Life Cycle) and ITIL ® frameworks significant progress and enhancements can be made to future implementations and concerns raised in this research around third part management, user interfaces, management reports and future releases could be mitigated.

It was also recommended that the discussion around creating a collaborative workspace for projects on the current Store Portal be reopened as there is a requirement for such a tool. SharePoint mobile access was also recommended as a solution that could address the requirement to access the Store Portal remotely with mechanisms such as smart phones.

6.6.3 Business process

It was highlighted that redefining the business processes is imperative to a solution that is to deliver value add and return on investment. It was also evident from the relevant post implementation considerations, validation of the IT support processes is important. The known challenges in this area provide opportunity for refinement, and it was recommended that more rigorous application of frameworks such as ITIL ® be observed.

6.6.4 Change management

As reflected on in chapter five, it is clear through this research study that although the implementation was largely regarded as a success, the change management process surrounding the implementation could have been improved on. As a result of the lack of upfront broader business engagement, buy-in from role players who were considered to be out of project scope may have presented alternate solution leveraging mechanisms (opportunities to use the solution for other business activities) or even collaborative funding for the project. It was recommended that a dedicated change manager can add significant value on any future SharePoint related releases.

6.7 Recommendations for further study

This study was focused specifically on the Woolworths Communication and Task Management Portal implementation. Given the general nature of the number of post implementation recommendations, inferences may be fairly accurately drawn as considerations for other organizations.

Future research should validate the findings and recommendations of this study using data collected from possible future implementations of this nature. In addition, the study could also provide a model for the implementation of a collaborative workspace solution (system environment where teams of people can work and collaborate specifically around projects) that may not only provided to internal Woolworths business units but to external partners such as suppliers as well as the recently formed Woolworths Financial Services and ABSA joint venture. An opportunity exists to conduct more in-depth research in this area, including broadening the sample size taken for this research to better understand the sentiments and impacts both pre and post a collaborative workspace SharePoint releases.

6.8 Self Critique

This research study proved to be an incredible learning experience. One of the biggest challenges was being able to switch report writing styles from business to academic. As the researcher fulfills an IT business management function, business reporting is an activity done on a daily basis. The ability to switch to an academic style of writing is a skill that is developed over time with the assistance of an experienced supervisor who in my case was Dr. Myles Wakeham.

The researcher has also realized the importance of defining the scope of the research and subsequent research methodology and approaching. Whilst the scope definition needs to accurately address the research requirements surrounding the problem statement, incorrect articulation of these definitions and approach could lead to hours of unproductive research study. The researcher believes that the opportunity did exist to narrow the scope of research study further to focus on certain elements of the critical success factors for an implementation of this nature. This could have allowed for a more in-depth analysis around particular communication, change and system implementation models. The researcher acknowledges that a bigger data sample, upon which the research was based, may have helped, but as it was a homogenous group the researcher felt that the sample sufficed.

Although the researcher feels that the literature reviewed covered most of the intended scope of research, there were opportunities for deeper analysis in the areas of change management and public IT governance models such as ITIL (Information Technology Infrastructure Library). The research data highlighted that these particular areas required considerable focus in the next phases of the application release and were linked to recommendations in chapter five. A deeper focus of these areas in the literature review would have allowed for potentially better congruence to the recommendations provided as well as

greater learning experience for the researcher in terms of these applying these models to a learning organization.

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APPENDICES

Appendix 1: Survey for SharePoint Implementation (Store Communications Portal and Task Management)

ALL RESPONSES WILL BE DEALT WITH CONFIDENTIALLY
(Please tick either Yes/No/Not Sure where appropriate)

Question	Type	Aim
13. Do you believe enough stakeholder engagement took place prior to the implementation of the store task management and communication portal? <i>Please provide reason for response</i>	Yes/No	To test the level of stakeholder engagement prior to design
14. Do you believe that the Implementation team addressed the store requirement effectively through the design process? <i>Please provide reason for response</i>	Yes/No	To test whether store management felt the business requirement has been met
15. Do you believe that the Implementation team addressed the head office requirement effectively through the design process? (Head Office Response Only) <i>Please provide reason for response</i>	Yes/No	To test whether head office management felt the business requirement has been met
16. Do you believe the following key considerations should have been taken into account for the SharePoint implementation?	Yes/No	To further test whether specific "key considerations" have been included as part of the new communication portal functionality
<ul style="list-style-type: none"> • User Engagement (refers to the design team talking to future users of the system) 		
<ul style="list-style-type: none"> • Improved Communication from Head Office to stores 		
<ul style="list-style-type: none"> • That the new system allow for improved task management and communication 		
<ul style="list-style-type: none"> • That stores to head office communication has improved subsequently 		
<ul style="list-style-type: none"> • That cost should have defined the solution 		
<ul style="list-style-type: none"> • That the solution should have defined the cost. 		
<ul style="list-style-type: none"> • Other (please specify under comments) 		
<i>Please provide any additional reasoning as to your responses above:</i>		
17. Do you believe that the new SharePoint solution has delivered the ability to:	Yes/No	To test whether the new store communication portal has improved on

		certain processes (cost and communication)
<ul style="list-style-type: none"> Process and execute the Woolworths strategy more effectively 		
<ul style="list-style-type: none"> Improved Communication from Head Office to stores 		
<ul style="list-style-type: none"> That the new system allow for improved task management and communication 		
<ul style="list-style-type: none"> That stores to head office communication has improved subsequently 		
<ul style="list-style-type: none"> That cost should have defined the solution 		
<ul style="list-style-type: none"> That the solution should have defined the cost 		
<ul style="list-style-type: none"> Other (please specify under comments) 		
<i>Please provide any additional reasoning as to your responses above:</i>		
18. Do you believe that the new SharePoint solution has delivered the ability to:	Yes/No	To test whether the new store communication portal has improved on certain processes
<ul style="list-style-type: none"> Process and execute the Woolworths strategy more effectively 		
<ul style="list-style-type: none"> Create a culture shift (changed our attitude towards communication and task execution) 		
<ul style="list-style-type: none"> Create a workspace where intellectual property can be stored and accessed easily and become an enabler to improved management decision making 		
<ul style="list-style-type: none"> Change the way Head Office and Stores engage with each other 		
<ul style="list-style-type: none"> Create a single contact point around management tasks 		
<ul style="list-style-type: none"> Create a single contact point for Head Office to engage with stores 		
<ul style="list-style-type: none"> Create the opportunity for you to collaborate with your store network and regional management structures 		
<ul style="list-style-type: none"> Potentially reduce waste own damages (through the Red Flag Process) 		
<ul style="list-style-type: none"> Facilitate learning/training interventions 		
<ul style="list-style-type: none"> Create a platform on which future requirements can be built 		
<i>Please provide any additional reasoning as to your responses above</i>		
19. Do you believe that SharePoint is sufficiently intuitive (easy to understand and navigate) in order to manage the various day to day activities within your store?	Yes/No	To test respondents view on the intuitiveness/user friendliness of the solution
20. Where do you believe the Communications Portal solution has delivered/not succeeded?	Yes/No	This is a catch all question aimed at distilling an overall measure of respondents perception of the solution
<ul style="list-style-type: none"> It will give Woolworths the competitive advantage 		
<ul style="list-style-type: none"> It provides a secure environment for Store Managers to operate in 		
<ul style="list-style-type: none"> I believe the solution is world class 		
<ul style="list-style-type: none"> It will deliver a return on investment for Woolworths 		
<ul style="list-style-type: none"> It has impacted our business positively (please comment) 		

<ul style="list-style-type: none"> • It has allowed me to become more productive 		
<ul style="list-style-type: none"> • It has forced me to perform actions within the time constraints provided by Head Office 		
<ul style="list-style-type: none"> • It reminds me to perform tasks that I would have previously forgotten 		
<ul style="list-style-type: none"> • It is better than the previous communications process 		
<ul style="list-style-type: none"> • It performs the same as the old Imbizo (web) system 		
<ul style="list-style-type: none"> • The system responds quickly 		
<i>Please provide any additional reasoning as to your responses above</i>		
<p>21. Do you believe the new solution has improved store communication and task effectiveness</p> <p><i>Please provide reason for response</i></p>	Yes/No	To test respondents view on whether the solution has taken a step forward as compared to previous communication and task management processes
<p>22. Has the solution taken away the flood of communication from other sources in the business?</p> <p><i>Please provide reason for response</i></p>	Yes/No	To test respondents view on whether the solution has taken a step forward as compared to previous communication and task management processes
<p>23. Would you change or add to improve the current solution?</p> <p><i>Please provide reason for response</i></p>	Yes/No	This question tests respondents perceptions around potential gaps in the new solution
<p>24. Do you believe this solution can provide Woolworths with a competitive advantage and if so in which way</p>	Yes/No	This question tests respondents view around the solution providing a competitive advantage and ultimately a return on investment
<ul style="list-style-type: none"> • Provide improved and more structured activities around processes and other campaigns 		
<ul style="list-style-type: none"> • More effective store staff through better executed communication strategies 		
<ul style="list-style-type: none"> • That store managers are managed through the solution on their ability to execute tasks more effectively 		
<ul style="list-style-type: none"> • The fact that store managers can upload action plans which means they have to think about store improvement initiatives 		
<ul style="list-style-type: none"> • The store has a better idea of what is planned through the integrated store calendar 		
<ul style="list-style-type: none"> • Other (please specify) 		

25. Do you believe that solution will assist stores in the overall communication and task effectiveness? Please tick % below (*This question tests whether the solution **has impacted** on store processes*)

- 0%
- 20%
- 50%
- 75%
- 100%

26. If you could quantify the financial benefit of the solution across the Woolworths organisation what would you imagine the Rand amount would be? (*This question tests respondents view on the perceived value of the **Return on Investment***)

- No Benefit
- Less than R 100 000
- R 250 000
- R 500 000
- More than R 500 000

27. In what areas do you believe the above financial benefit will be realized (*This question tests respondents view on the perceived value of the **Return on Investment***)

- Waste Own Damages
- Training and Development
- Improved Productivity Through Process Compliance
- Other (*Please provide reason for response*)

What do you believe the critical success factors are in the implementation of a store communication portal (This question tests the **overall objective** of the research study)

Appendix 2: Microsoft ® SharePoint 2007 Overview

Overview Extract

<http://office.microsoft.com/en-us/sharepoint-server-help/introduction-to-microsoft-office-sharepoint-server-2007-HA010173217.aspx#BM1>

Office SharePoint Server 2007 is a new server program that is part of the 2007 Microsoft Office system. Your organization can use Office SharePoint Server 2007 to facilitate collaboration, provide content management features, implement business processes, and supply access to information that is essential to organizational goals and processes.

You can quickly create SharePoint sites that support specific content publishing, content management, records management, or business intelligence needs. You can also conduct effective searches for people, documents, and data, participate in forms-driven business processes, and access and analyze large amounts of business data.

In addition, Office SharePoint Server 2007 is designed to work effectively with other programs, servers, and technologies in the 2007 Office release. For example, in many 2007 Office release programs, you can initiate or participate in workflows, which are the automated movements of documents or items through specific sequences of actions or tasks that are related to a business process, such as the approval process for an expense report.

Collaboration

By using the following features in Office SharePoint Server 2007, you can work more efficiently and effectively with other people in your organization:

Use site templates to collaborate or manage meetings When you create a new Office SharePoint Server 2007 site, you can start by selecting one of

several different kinds of site templates for collaborating with other people and managing meetings. The site templates in the Collaboration group are designed to help teams within an organization work on projects and collaborate on documents. For example, by using the Document Workspace site template, you can work with other people on a document or a set of documents. The site templates in the Meetings group are designed to help teams within an organization manage different kinds of meetings. The templates in this group support everything from basic meetings to decision-focused meetings or even social events.

Share documents, contacts, tasks, and calendars You can synchronize your Office SharePoint Server 2007 calendar with Office Outlook 2007. You can enter all-day events and specify more types of repeating, or recurring, events. You can track team projects more effectively with visual day and month views.

Brainstorm easily with wiki sites A wiki site enables you to brainstorm ideas, collaborate on a team design, build an encyclopedia of knowledge, or just gather routine information in a format that is easy to create and modify. Your team members can contribute to wikis from their browsers — they don't need a word processor or special technical knowledge.

Share ideas with blogs A blog, or weblog, consists of frequent short posts that are displayed in order, starting with the most recent post. With Office SharePoint Server 2007, it just takes a few clicks to create a blog, post to a blog, subscribe to updates to a blog, or customize a blog.

Receive updates to lists and libraries with RSS Lists and libraries use Really Simple Syndication (RSS) technology, so that members of your workgroup can automatically receive updates. RSS is a technology that enables people to receive and view updates or *feeds* of news, blogs, and other items of interest in a consolidated location.

Manage projects You can create a **Project Tasks** list, which includes a Gantt chart. A Gantt chart is a type of visual overview of project tasks that you can use to monitor the dates and progress of team tasks.

Get mobile access to content You can view portals, team sites, and lists on a mobile device to help you stay current on team projects and tasks when you are travelling. For example, lists appear on phones (or other telecommunications devices that support international standards) in a simplified text format, with a link to scroll through the content of each page.

Send e-mail to Office SharePoint Server 2007 You can use an e-mail program to participate in discussions, meetings, and documents on an Office SharePoint Server 2007 site. Just as you send e-mail messages to your team to discuss tasks and projects, you can also send e-mail messages to an Office SharePoint Server 2007 site or to a specific list or library.

Manage documents and some types of lists offline You can take your important work with you wherever you go. With Office Outlook 2007, you can work offline on files in a library and items in the following types of lists: calendars, contacts, tasks, and discussions. When you connect back online, you can update your files on the server. List items are updated automatically.