

PerformanceXpress

Tales from the Field: Using the SAM for Cause Analysis in a Large Retail Setting

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The Field

Belk Department Stores is a retail company that has approximately 300 stores and over 30,000 employees. Belk's training department is located in its corporate offices and employs 16 personnel. These 16 individuals are broken into 3 training teams (3-5 members each), a management team (3 members) and a support team (2 members). The training department is responsible for all the training that takes place in each store location and for the corporate offices. The team uses several media, depending on the content and audience, including print, video, online courses, and instructor-led classes.

The Issue

The management team identified a problem with internal communication amongst the 3 sub-teams. The employees "just can't find the information" they need in order to complete their projects in a timely manner. The management team became aware of this issue through employee complaints and through their own personal difficulty in finding specific pieces of information. The management team requested a Needs Assessment in order to help reduce the time the team members use to look for information necessary for them to successfully perform their job duties.

Each team member had opinions regarding the cause of the communication problem, but none of them had any data to back up their ideas. In fact, no data had been collected to determine how long the employees were even spending looking for information. Even though there was no hard data to display a performance gap, the complaints and frustrations from the team members identified this as an issue that needed to be addressed.

Framing the System

When we used the Synchronized Analysis Model (SAM) (Marker, 2007) to guide our questions and analysis of the results, the contributing causes of the performance gap became obvious. Subsequently, the management team could now address these contributors which would reduce the time employees spent searching for information necessary to do their jobs efficiently.

After collecting the data through focus groups and follow-up interviews, 28 contributing causes were discovered that were increasing the difficulty in finding information. Each of these contributors were numbered and inserted into the SAM. The results are shown in Table 1. Some of these contributors were related to:

- time spent determining to whom questions should be directed

- time spent searching the shared network drives (employees were keeping files in personal folders instead of project folders which lead to files being duplicated)
- understanding how a project an employee is working on relates to and affects other employees' projects.

Although the numbers only give an approximate visual representation of the contributor causes, it is clear to see that the majority of the issues are caused by the environment surrounding the Job. If we were to combine the External, Organization, and Job rows into a single environmental row—as Gilbert's BEM does—very little separation occurs. The added levels within the environment that the SAM provides, allowed us to gain a better understanding of exactly where we needed to focus to close the gap as quickly and as easily as we could.

Table 1. Contributing Causes by Level and Area

Synchronized Analysis Model

	Information	Instrumentation	Motivation
External		8 9	
Organizational	7 12 26 28	14 21 22	
Job	1 4 6 17 25 27 23 24	2 5 13 18 19 20	
Individual Behavior	10 11 15 16		3

Solutions

The first two solutions are specific to the training department. The third solution is targeted at the entire organization.

1. Assemble a task force made up of representatives of each of the three training sub-teams to examine and create guidelines for saving files on the department file drives.
2. Create a graphical representation that displays each project and the relationships between projects. This is used to understand how each project impacts other projects owned by other team members.
3. Pilot a new company directory that allows searches based on employee's areas of expertise along with their name and contact information.

IPT-grounded Advice (Advice for practitioners based on the case)

- 1) Use a performance model that fits your specific organization and your performance gap. The data you collect is only valuable if you can organize it and make accurate recommendations based on it.
- 2) Do not manipulate the data collection up front. If your gut feeling about what is causing the performance gap prior to the research is in fact what IS causing the gap, it will become evident in the research.

Biographies

Marc Donelson lives in Charlotte, NC and currently holds several titles. He is the owner of Donelson Interactive, an online training and performance improvement consulting firm. He is also a Program Manager in the training department at Belk Department Stores. Finally, he is a graduate student at Boise State University. Marc can be reached at marc@donelsoninteractive.com.

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References

Marker, A. (2007). Synchronized Analysis Model (SAM): Linking Gilbert's Behavior Engineering Model with Environmental Analysis Models. *Performance Improvement*, 46(1), 26-32.