

Training Requested: Searching the AS400

Requesting Manager: Eric Joseph

Trainees: Telesales, Specialty Sales, Customer Service, Sales Floor, Front Counter, Pro/Rental Sales

Date Completion Needed: July

Program #: 000302

NEEDS ANALYSIS

There seems to be a lack of understanding regarding the AS400, particularly in regards to searching for items. Searching is vital to the efficiency of the departments in question, especially telesales. The result is that too much time is being spent looking for products in the system, and the search results are not always complete or accurate. This has an impact on revenue generating activities and customer satisfaction.

The general consensus among employees is that the system is slow, cumbersome and hard to use. This indicates that system search functions are not being optimized by the employees.

As gleaned from interviews, employees do not know what constitutes a division, which divisions exist, what constitutes a product class, and which classes exist. Employees do not know how to search on division or class or how to combine fields to narrow searches. Employees understand the "Question mark" search, but do not apply it correctly. Also, key words are not being used.

There is no indication that a lack of typing skills, the inability to see the screen, poor system performance, or other external factors are impacting performance. Similarly, there is no indication of employee resistance to the technology. In fact, employees are anxious to speed up their performance in this area.

Though there are some conceptual knowledge gaps, the largest contributor to achieving terminal performance is a skills deficit in methodological application.

A 2 hour, 6 person group session for employees will provide enough exposure to correct most of the problems. The class should include lecture, exercises and a test.

TOPIC/TASK X UNIT MATRIX

Searching the AS400 for product: All client-facing departments utilize the top 13 item-searching actions as part of their daily function. The New Search Keyword action is the most underused.

| | <u>Telesales</u> | <u>Educational Sales</u> | <u>Customer Service</u> | <u>Showroom</u> |
|----------------------------------|------------------|--------------------------|-------------------------|-----------------|
| Item Searching | | | | |
| Classes | X | X | X | X |
| Divisions | X | X | X | X |
| UPC/EAN | X | X | X | X |
| Look Up Classes | X | X | X | X |
| Look Up Divisions | X | X | X | X |
| Search "?" | X | X | X | X |
| Item Search | X | X | X | X |
| Search Description | X | X | X | X |
| Search Div/Cls Serch | X | X | X | X |
| Search Keyword | X | X | X | X |
| Search Combination | X | X | X | X |
| Search UPC/EAN | X | X | X | X |
| Common Description Abbreviations | X | X | X | X |

TOPIC TASK ANALYSIS

Item Searching the AS400 can be accomplished several ways. Searchable fields provided are Item, Description, Division & Class, Keyword, UPC/EAN. All searches find matching text strings beginning with the first character in the field. There are no mid-field searches. The one exception to this is in Description where a "Question Mark" search can be performed. By starting the search string with a question mark (?) the search will look for a matching string anywhere in the field. Fields can be combined in search. A division number and a description can be entered and usually results in a faster, and more narrow, result.

The class field is not searchable by itself. It must be paired with a division number.

Class numbers are assigned to every manufacturer that provides product to Freestyle. Class numbers are not unique and can be assigned to several manufacturers. In the case of very small providers, the miscellaneous class 99 is assigned.

TRAINING MATERIALS

Instructional Goal

At the end of the course, students will be able to successfully find, using the AS400 only, any item in the AS400 within three tries or four minutes.

Instructional Objectives

Be able to explain (write) the main functions of Class numbers and Division numbers in our AS400 system.

Be able to explain (write)

- what a UPC Code and an EAN Number is
- what the difference is between a UPC Code and an EAN Number

Given access to the Item Search screen, be able to:

- look up a division number for any given division
- look up a class number in any given division

Given access to the Item Search screen in the AS400, be able to write down the current, single item selling price of a product.

When shown an AS400 abbreviation, be able to write down the word it represents.

Given a partial description of any item in the AS400 system, be able to use the AS400 to look up that item's price, its complete description, its division/class number, and its stock number.

Course Outline

Divisions, Classes, and Other Numbers:

Divisions are our friends - or How they define and simplify our lives

Learn from Classes - or Get the short list.

Bar Codes

Price Look Ups:

How To Compare prices between two items: The pencil is not obsolete.

Narrow by computer: Think like a computer

Narrow by voice: Focusing the Customer's Request:

- Quantity
- What do they want
- What do they want to do

Item Searching the AS400

What is a text string?

More than one way to skin a cat.

How many is too many?

Abbreviations, Language & Keywords.

Abbreviations - In order to get the most information on each line of description, we use abbreviations.