

Job Instruction - IT

Training Within Industry (TWI), the solution at De Bortoli Wines, Bilbul, Australia.

De Bortoli Wines - Information Technology Department Oscar Roche

Brief

This is an excellent case of the application of TWI Job Instruction (JI) in a non-manufacturing situation. The perception that “TWI is only works in manufacturing” is challenged.

Managers of service departments, particular those where IT plays a large part, will gain an understanding of how JI helped De Bortoli Wines reduce frustration and errors during the introduction of a new electronic sales ordering system in the field.

Data errors were reduced significantly and order duplication eliminated. JI helped the IT staff establish a structured program for training the field sales staff in the use of the tablet PC's. Many of the staff were long serving employees scattered all across Australia who were very wary of the moving away from a paper / fax based ordering system. Coupled with this, by their own admission, the IT people were not great instructors.

INTRODUCTION

IT (8 staff) needed a tool to transfer the skill of inputting a sales order into the sales system via a tablet PC. This task was to be done by approx. 70 sales staff over all States and Territories across Australia. The IT techs were not great instructors by their own admission. The transfer of the skills was likely to be “sticky” as it required “change” in a very mature Sales Department. Fumbling through instruction of new computer based skills may have been disastrous.

The transferring of the skills was part of a larger project with the aim to:

- Quality - reduce data input errors, so the customer gets what they want.
- Quality and Productivity - reduce duplication of data entry.
- Productivity - decrease lead time.

The identified challenges were:

- IT Department not great instructors.
- Many of the Sales Department were “mature” and had been with the company for a long period.
- Many of the Sales Department had not used a tablet PC or “touch” based devices.
- The Sales Department deemed the sales system complex, thus the Sales Department took the orders, they did not enter them into the system.

- Sales Representatives located in all States and Territories, and not just in the capital cities.

CONTENT

The IT Department undertook Job Instruction training in October 2012. The plan was for only 3 to complete all the sessions with the other 5 to sit through the first session as observers in order to have an overview of the methodology. The first JI session generated sufficient interest for 7 of the 8 to complete the full program.

15 Job Instruction Breakdowns (JIB's) were created for 2 skills. The 2 skills were "Using an electronic tablet" and "Entering a sales order". The 15 JIB's catered for a wide range in computer skills in the Sales Department. (Those sales people less familiar with PC's needed to be taught via more detailed JIB's.) Selected IT staff were identified to practice the skills of delivery, and refine JIBs, before the roll out commenced. A test database file was created to allow the Sales Team to practice the skills.

Teaching of the new skills was then rolled out and delivered to all sales staff. It was completed by the end of December 2012 (not including Step 4, Follow Up).

The 3 aims (first 3 bullet points at the top of the page) were measured as follows:

- Orders entered were monitored to see who was entering the orders and determine who was not. (Level of follow up required could then be determined.)
- Support calls (requests for help from sales people) were tallied. (Repeat issues might lead to modification of JIB's as Key Points may have been missed.)
- Entry errors were logged from back office (order entered was not order taken).

Results were noted as follows:

- Data input errors occurred at 10% of the frequency prior to implementation.
- Duplication 100% eliminated - the order taker and the person entering the order are the same person (at the same time, in front of the customer).
- Processing time decreased to less than 1 minute (from order taken until inputted into system).
- All of the Sales Staff trained using the JI method by mid-January 2013.
- By February 2013 90% of the Sales Staff were using the tablet and entering orders directly into the sales system using the tablet at the point of sale.
- Sales Staff have asked for promotion material to be added onto their tablets so the device allows them to "sell" not just take orders.

Bill Robertson, IT Manager De Bortoli Wines,

CONCLUSION

Job Instruction taught the De Bortoli Wines IT staff:

- How to prepare for the training of sales staff, in particular how to effectively breakdown tasks.
- An effective and proven 4-Step method for the teaching of data entry tasks.

The results from applying this structured pattern of skill training speak for themselves.