Mapping and Evaluation of Supporting Documents

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This article is an excerpt from a master thesis project at IKEA of Sweden. The master thesis is written in assistance of Production Management within Department of Industrial Management & Logistics at Lund Institute of Technology, Lund University. The target of the project is to map supporting documents within IKEA and evaluate the use and factors influencing the use.

Abstract

The purpose of this article is to describe the Master thesis “Mapping and evaluation of supporting documents” performed at IKEA of Sweden. Supporting documents (SD) is used as an umbrella for all kinds of steering and supporting activity descriptions for IKEA co-workers.

This project is needed mainly due to tremendous growth during the last decade, when IKEA has managed to significantly increase the turnover. The focus on expansion has caused the internal structure to centre on the daily business problems. This has caused the spotlight on strategic issues, for example how to handle the supporting documents and organise the company, to seize.

The objectives were mainly to map IKEA’s supporting documents according to their processes and to evaluate the use of those and find factors affecting the use.

The use of supporting documents inside IKEA is too low and needs to increase. Thru the master thesis project this have been enlighten for the IKEA organisation and there is now awareness among the managers. Factors influencing the use of these supporting documents have been found and analysed.

Purpose

This master thesis is divided in two phases;

- The purpose with the first phase is to map and sort out supporting documents within IKEA.
- The purpose with the second phase of the project is to evaluate if supporting documents are used or not and factors influencing the use.

During the first phase the amount of supporting documents will get known and the supporting documents within the main process Supplying will be divided between the six different core processes. In the second phase different factors of why supporting documents are used or not will be discussed during interviews, these parameters will then be further evaluated in a survey conducted with a wide range of users.
Methodology

Solution for sorting out the documents
The mapping of the supporting documents will be done with a descriptive approach to explain and examine how the current allocation and structure of the supporting documents are today.

Solution for sorting out the documents
The current topics on the intranet was kept and then sorted out between the three main processes according to the classifications made on IKEA’s intranet. When the first sort out is done, the next iteration will be between the six core processes within the main process Supplying. In this part the supporting documents in the main process Supplying will be considerably more thoroughly elaborated. The objective is to find the supporting documents belonging to the core process Plan & Secure Supply, which will be given to the corporate supervisor of the project. The documents belonging to the five other core processes will be given to their process organisation.

Solution for evaluating the use of supporting documents
The second phase of the project will be conducted with an explanatory approach and both qualitative and quantitative studies will be applied. Explanatory studies seek explanations and reasons behind problems and the objective with this part of the thesis is to examine the use of supporting documents.

Interviews
The purpose of the qualitative part is to collect employee’s comments about supporting documents and gather information for creating a survey. Ratio selection will be used to clarify which employees will be chosen as interviewees. It is important to spread over different functions to raise the credibility of the research. Chosen for the interviews are employees from Trading and IKEA of Sweden Supply Chain because they fulfil the premises required.

Those chosen as interviewees need to be users of supporting documents and involved in the daily operative work at IKEA. They need to be accessible and therefore employees working in Älmhult will be used. This makes it more time saving and cost effective, though it is important to remember the risk of sub optimisation by choosing persons only active in Älmhult. The roles chosen for the purpose of simplicity are therefore Need, Demand and Supply Planner Trading.

Survey
Respondents will be chosen through ratio selection and represent a range of different work assignments within IKEA. Roles chosen to attend the survey are: Need planner, Demand planner, Supply manager trading, Category leader, Sourcing Developer, Supply planner trading, Business developer and Business developer manager. Hence the sample size will be approximately 820 employees.

The above roles have been chosen because they all are users of supporting documents, which is the criterion for attending the survey. The survey will be constructed with mostly closed alternatives and is based on the information gathered during the interviews. The statements with closed alternatives will reduce the effort needed for analyzing the data.

The survey was completely constructed in Questionbuilder and invitations were sent out with help of the software. The respondents had almost three weeks to answer and reminders were sent out to those who had not responded after one and two weeks. The data received were analyzed with the software SPSS.
Mapping of the supporting documents

The initial mindset was to read and process every supporting document within IKEA. This was discovered to be an overwhelming task and therefore the current topics on the intranet were used to divide the supporting documents between the main processes. There were a large amount of supporting documents located under *Methods and Strategies / Routines and Working methods* at IKEA’s intranet. The sort out was evaluated and resulted in an allocation of the supporting documents at 85% correctness. This implies that some supporting documents, belonging to the main process *Supplying*, have been sorted out the other main processes, hence the substantial amount of supporting documents this is considered to be a necessary liability. The largest shares of the documents are “Portable Document Format (Pdf)” -files but there are also other formats such as movies, pictures and excel files.

Most of the supporting documents were sorted out to one of the main processes, called *Supplying*. The work associated with sorting out these supporting documents to the core processes was substantial. Approximately 10% of the supporting documents were sorted out to the core process *Plan & Secure Supply*. The average age of the supporting documents within the core processes in the main process *Supplying* where calculate. The differences in average age are quite small and the supporting documents’ average publishing year is around 2007.

The use of supporting documents

IKEA’s supporting documents are used every eight weeks by the average employer. This implies that the average user of the supporting documents use a supporting document six times a year. This clearly summit the low use of the supporting documents. Therefore IKEA needs to emphasize on the value the use of supporting documents brings to IKEA.

To increase the use of supporting documents IKEA needs to close the gap between the actual and the wanted level of purpose of the documents. If the employees think the supporting documents do not meet the organisational requirements and/or if they do not get the wanted support, the use of supporting documents are quite likely to stay at the same level as today. The purpose of supporting documents is also concluded to be the individually most important factor in the survey, by the factor analysis.

The results from the survey showed no significant difference between the opinions of men and women, within IKEA’s employees; they have the same attitude towards the supporting documents.

The survey also showed that employees form their opinion about supporting documents early in their employment, which stays the same throughout their employment.

Recommendations

*Document handling system*

When migrating the documents from the old intranet there were a 90% decrease in the number of documents, although there are still some duplicates published on the intranet. This is a big shortage in the system and emphasises the lack of a document handling system. The number of duplicates is not large but this is not the point, the point is the option to have two identical documents published on the intranet. This possibility brings complexity to the system and increases the administrational work.

A clearer responsibility of the supporting documents supported by a document handling system would reduce this complexity and
bring structure and up-to-date supporting documents.

**Better structure**
When the document handling system is in place, the possibility to organise the supporting documents, according to the wanted structure, increases significantly. The users of today find it difficult to locate the supporting documents relevant to their work assignment. This is a central disadvantage in the way of working when co-workers believe it takes too long time to find the relevant supporting document. It directs the employee to work according to his own way and use the supporting documents as a last resort when something has gone wrong.

**Support from top management**
IKEA’s top management needs to define for the whole organisation how the documentation should be. They need to establish a documentation standard and develop a structure for how employees should search for a specific document. They also need to decide how they should handle different versions and finally define responsibilities and how to handle security issues.

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