Chapter XXIV

The Training Challenge:
Installing a POS for Improved Reporting and Customer Satisfaction

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EXECUTIVE SUMMARY

This case chronicles the problems that can arise in outsourcing agreements due to factors such as poorly defined user requirements, passive resistance from technical support personnel, and lack of contract specificity and documentation detailing who performs what. It illustrates how delays up front will impact the final end user, i.e., the organization's customers. Eventually, in this case, all personnel became familiar with the new system and it became an asset to the organization. The issues noted in this case are applicable to the implementation of technology by any organization handling both retail and service activities.

BACKGROUND

University Golden (UG) enjoys a prestigious 175-year history that is reflected in its distinctive architecture, reminiscent of European villas on the Rhine. Located on 125 rolling acres overlooking the Oyster River, University Golden has 2,000 full-time residential undergraduate students and over 4,000 commuter graduate students who represent members of the surrounding professional community. Over the years, University Golden's services to students, faculty, employees, and the numerous tourists who visit to view its museum and architecture, have grown beyond the traditional text book and gift store features to include dining facilities, catering and canteen services, barber shop, laundry, tailoring and infirmary services, plus athletic and special event ticket sales. Each of these functions utilized an independent sales system with their respective input and reporting requirements. Some utilized bar coding for inventory control and reporting (text book and gift sales) while others were strictly cash transactions (barber shop, dining facility and canteen services). Physically dispersed over the campus, the employees handling sales and inventories in these various areas followed diverse operating procedures ranging from the use of relatively advanced electronic cash registers to simple one-step cash drawers. Although the Book Store used barcoding for pricing and collection of sales data, it did not have the ability to maintain a perpetual inventory. As a result, the organization's auditors had expressed concern over the tracking and reporting of stock losses. In addition, increased sales caused the Gift Shop to outgrow its present recording system and expand its reporting requirements. Both the Book Store and the Gift Store manager, who operated independent entities but reported to the same vice president (VP) of finance, agreed that it was time to investigate a new and improved system.

SETTING THE STAGE

In order to provide better inventory control and reporting features, plus improve service to its customers, UG decided to establish a Point-of-Sale (POS) system that, in addition to accepting cash and credit cards, would utilize photo identification (ID) cards to authorize charges on personal accounts at these diverse facilities. Not only would this decision involve handling the technical details of installing new hardware and software, it would also necessitate the re-training of all sales personnel as well as the customers. No longer could a customer drop by the tailor shop to have alterations handled on a signature and a smile—now the proper use of a scanned ID card would be required.

Once the decision was made to install a POS system, the next step was to find a suitable vendor at an acceptable price. A Request for Proposals (RFP) that laid out general, overall system requirements and guidelines for bidding was sent to seven vendors on January 26, 1994, with a preproposal conference set for March 11, 1994. The intent was to obtain an off-the-shelf package that would allow for a turn-key operation rather than one that was customized, so that the system could be up and running as soon as possible. The RFP set forth the following conditions:

RFP—GENERAL

The University desires to solicit proposals to acquire a state-of-the-art bookstore automation system. The system must contain specialized, comprehensive inventory management facilities with specialized applications for each of the following: Textbooks,

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