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**IBM Professional  
Office Systems  
Implementation Guide  
for Managers**



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## Introduction

IBM's Professional Office System (PROFS) is a computer-based system designed to improve the way information is handled in a contemporary office. The use of PROFS can increase overall office productivity.

PROFS can be applied to almost any aspect of work in an office, and the benefits can extend to the entire organization. However, these benefits will be realized only if PROFS is implemented as part of an overall information management plan.

## What PROFS Does For Professionals

Most of the computer software used in an office handles fixed, regular, and structured transactions very well. For instance, most firms use payroll, general ledger, inventory, and other software to conduct routine work. However, the more unstructured and variable aspects of a professional's work are carried out largely without the help of a computer. Aside from work that requires the judgment and experience of a professional, much of this work involves tasks such as getting information from others or sending it to them, keeping track of assignments, filing, making copies, filling out forms, and maintaining a calendar.

In fact, a professional may spend at least part of the workday on secondary or support activities, including many that might be considered administrative and clerical. These tasks may be essential, but performing them is the biggest drain on a professional's productivity. PROFS has been developed to reduce the need for a professional to perform this kind of secondary work and increase his productivity, and to make work less burdensome and time-consuming.

In order to benefit quickly from PROFS, it is important to plan and manage the implementation correctly. This guide was developed to provide managers with a basis for formulating a PROFS implementation plan and carrying it out successfully.

## The Scope of This Guide

**Implementation Planning and Management.** This guide will provide you with a detailed description of how to plan and manage a successful PROFS implementation. It includes methods for:

- Analyzing your firm's requirements
- Identifying user needs
- Utilizing your implementation resources effectively
- Getting the most out of PROFS

The approach described in this guide is called the FLAG implementation method. FLAG was developed by studying the process by which PROFS was implemented in several firms. As a result of the research, the best parts of several PROFS implementations were combined into a single process based on three building blocks.

FLAG directs the PROFS implementation towards those aspects of professional work that are most likely to yield benefits quickly and to serve as a springboard for future PROFS users and applications. FLAG is also the best and most complete way to use PROFS to make your firm operate more effectively. It will guide the PROFS

implementation so that the power of PROFS is brought to bear on the improvement of critical professional and administrative activities. By using this approach, your company will get the most out of PROFS while avoiding pitfalls and problems.

**Measurement Versus Management.** Most firms attempt to quantify how much more productive professionals will become with the introduction of PROFS. Of course, this is a measurement problem, and IBM is developing some tools to help you with it. However, the measurement can only estimate improvement that may occur or determine improvement that has occurred; it will not cause improvement. Improving professional productivity by using PROFS is *not* a measurement problem; it is a management problem.

PROFS gives you an extremely powerful tool for improving professional productivity; nevertheless, it is not PROFS, but management's application of PROFS, that will result in realizing that boost in productivity. That is why this implementation guide was developed.

In fact, this guide is concerned solely with managing the process of implementing PROFS. It does not provide the tools or the method for determining the cost-effectiveness of PROFS, nor does it provide an algorithm for making a business case.

Several forms and questionnaires are provided as part of this guide, for the implementation team's use in getting the data required to make sure that PROFS is directed correctly and that potential problems are recognized early. That is, they enable the team to "take the temperature" of the implementation at crucial times.

The questionnaires are not designed for making before-and-after measurements or for performing a cost-benefit analysis. Measurement of true productivity and cost comparisons would require more rigorous measurement methods, outside the scope of this guide.

## The FLAG Implementation Method

Although PROFS has features that can be useful to nearly every professional, people differ in their feelings about computers and about PROFS. Some professionals will be eager to try it; others will resist its use for a variety of reasons. An implementation capable of sustained vitality, growth, and continued increases in productivity cannot usually be constructed by simply giving PROFS to those who are enthusiastic and ignoring those who are not. Even for eager users, the ultimate value of PROFS is in the ability to exchange important information with the right people, readily and quickly. The unenthusiastic and the doubters have to be brought along with everyone else.

Even in an ideal situation, with everyone enthusiastic about trying PROFS, just having a large pool of users does not guarantee that PROFS will affect professionals' productivity. Success will result only from a carefully prepared implementation program.

### Three FLAG Building Blocks

Three building blocks can form the foundation for a good implementation – that is, for bringing people onto PROFS and for directing the power of PROFS at certain information-handling activities that are the keys to professional effectiveness:

- *Access.* It is often difficult to get hold of someone at another site, but getting hold of someone in the same building can be just as difficult if he is very busy or pressed for time. PROFS is a powerful means for facilitating access.
- *Intensity.* Intensity is reflected in, for example, the need to send or receive large amounts of information, to handle urgent requests, to meet tight deadlines, or to use scarce resources such as secretarial or administrative support. PROFS provides a tool for conquering problems created by information-handling intensity.
- *Prime value.* Finally, PROFS should be directed at facilitating prime-value activities – that is, information-handling activities that most affect the department's ability to achieve its goals. A prime-value activity is an activity that:
  - Directly affects the achievement of the department's or the firm's goals.
  - Is central to the department's or firm's operation, in that other information-handling activities can be built on it or added to it.

Taking prime value as a major criterion for selecting activities to be handled makes it more likely that PROFS will have a direct and positive effect on departmental outcomes and that the PROFS implementation will be self-sustaining and its viability will increase.

### FLAG Versus Critical Mass

This FLAG guide relies on the development and use of prime-value activities as the means for generating a self-sustaining use of PROFS. Basically, this means that the implementing group must consider its own mission and then develop information-handling activities that can be performed on PROFS to support that mission.

The FLAG approach differs markedly from what is called the *critical mass* approach, which is often attempted. The critical mass approach can be characterized as simply making PROFS available to professionals and support staff, probably on the basis of job level or perceived need. PROFS will then be used extensively and rewardingly only if users discover the value of sending notes, messages, and documents to each other, or of the use of other PROFS functions, such as the calendar and reminders. The value of PROFS is perceived as related to the number of professionals who are on PROFS and are sending each other notes and documents. This use may be only incidentally related to the mission of the departments and the firm.

We have studied both types of implementation approaches, and strongly recommend FLAG, for the following reasons:

### ***Active Versus Passive***

FLAG brings management into an active role in making sure that PROFS is successful, whereas the critical mass approach often encourages a “wait and see” attitude. Managers who take an active role accept a stake in the success of PROFS, and are more likely to put forth the effort and commitment necessary for success.

### ***Innovative Versus Substitutive***

The critical mass approach depends largely on users’ taking solitary initiatives to use PROFS. Because of the nature of organizations, this approach often encourages substituting some activity on PROFS for the very same “manual” activity. These one-for-one substitutions may create PROFS use, but often they have little direct value for the firm.

FLAG encourages innovation, in the form of improvement and change of information-handling activities, to take advantage of the power of PROFS. Such innovation can improve procedures, quality, and responsiveness. It also helps make sure that PROFS increases professionals’ ability to meet the firm’s objectives.

### ***Justifying Versus Excusing***

FLAG directly justifies the placement of work stations and printers, whereas the critical mass approach most often relies on “excuses” to justify hardware resources.

### ***Guiding Versus Guessing***

FLAG guides the training process. In this way a professional can experience a meaningful series of successes on PROFS with as little as 15 minutes of training. With the critical mass approach, the trainers must guess or anticipate what functions the professional must use. Inevitably, the first few sessions are frustrating to the novice user.

### ***Involvement versus Criticism***

One of the most important benefits of FLAG is that it encourages management and professionals to become involved. This is because users meet as a group to develop PROFS applications that they believe will facilitate their work. The very participation in PROFS application or information-handling activity development gives the users a stake in the success of PROFS. It also makes the value of PROFS clearly evident to the users and their managers. The critical mass approach is more likely only to encourage the users to criticize PROFS. Even if PROFS were used for



the same applications as might be found with FLAG, the critical mass approach would still not generate the same involvement and commitment, because the individual users would not be participating.

### ***Management Versus Measurement***

Finally, we must recognize that technology itself is inherently neither good nor bad. Technology in office systems is just the catalyst for changes that themselves will increase or reduce productivity. FLAG focuses executives' responsibility on the question of how to manage the PROFS implementation for the greatest benefit. The prime-value activity approach provides both the tools and the challenge to use office systems technology productively. In contrast, the critical mass approach encourages executives to think of PROFS as increasing productivity without considering management's responsibility for bringing about this improvement. Thus, the critical mass approach does little to foster the active guidance and involvement required from management in order for PROFS to succeed.

## Target User Group Missions and FLAG

FLAG implements PROFS by focusing on a limited group of users, the *target user group*. Within the target user group it is then necessary to determine the group's *goals* and *missions*.

### Goals and Missions

For each firm or major operating unit, there is a statement of purpose that reflects the goal. This may be something as global as “to maximize profits” or as limited as “to produce 20,000 units per month.” In any case, the goal should be clearly stated for the target group and used as the statement of the overall guiding principle for the PROFS implementation plan.

The supporting missions reflect the target group's purposes at a much more functional and specific level than the goal. Therefore, missions need to express, in detail, the purposes of each major function of the operating units. For example, if “to maximize profits” is the goal, missions might be:

- Keeping track of sales expenses
- Billing customers on time
- Resolving complaints
- Maintaining inventory
- Monitoring expenditures versus the budget
- Recommending new services
- Maintaining client relations

Missions should be detailed enough to provide the basis for enumerating the information required to meet them. Well defined missions and goals will ease the process of developing PROFS support for prime-value information-handling activities.

### Information-Handling Activities

An information-handling activity supports a mission and is defined by identifying:

- The information content and format
- The people who send, process, and receive the information

The information needed in an information-handling activity may take the form of a worksheet, a report, a decision, or any other information or form of communication. Of course, it is critical to define the information contents as completely as possible. These contents should be described in enough detail to:

- Completely enumerate the pieces of information needed for the task.
- Expose information shortcomings and try to overcome them.
- Form the basis for determining all the activities necessary to produce the information.
- Establish criteria for timeliness, completeness, and quality.
- Identify the department, group, or person responsible for each activity.

- Prepare any coding scheme for filing and retrieving documents.
- Develop any formats for use on PROFS.
- Make assignments for the use of PROFS.
- Set forth any procedures or standards for the use of PROFS to accomplish the information-handling activity.

Time spent on clarifying the information content of an information-handling activity will pay dividends by creating the foundation for a smooth PROFS implementation.

### **Prime-value Activity**

A prime-value activity is then an information-handling activity that:

- Directly affects the achievement of the group's or firm's missions.
- Is central to the group's or firm's operation in that other information-handling activities can easily be built onto it or added to it later. This also helps conserve training resources.

Of course, each firm will have its own particular variations or customized procedures; it would be rare to find identical PROFS applications in different groups or firms. The following is a list of prime-value activities common at PROFS sites:

- **Manpower allocation:** An updatable document that lists professionals, project assignments, time commitment to each project, and important dates.
- **Work report:** A listing of work in progress or work completed for a client. This is used to improve client relations and facilitate responsiveness to clients' needs.
- **Report of contact:** Each client contact must be reported. This allows the systematic filing and retrieval of reports.
- **Project summary:** A summary of each project to be completed by the project chief at the conclusion of the project.
- **Status report:** Periodic updates of work assignment or project progress.
- **Departmental library:** A PROFS hard-copy document for filing and retrieving materials such as reports, clippings, slides, books, and references.
- **Departmental calendar:** One or more PROFS calendars that are updated centrally and contain information on such matters as conferences, facility use, and administrative dates.
- **Administrative procedures:** A perpetually updated handbook of administrative procedures, maintained as a PROFS document.

The successful use of these and other PROFS prime-value activities will depend on two factors. The first is the extent of benefit to individual professionals. A good application will provide quick, easily obtained, and lasting benefits to each user. The second is value to management. Management will make a PROFS application

part of the overall departmental work requirements only to the degree that using that application increases management's ability to control, guide, and evaluate the department's work.

### **Method for Success**

In the FLAG process, then, the first step is to define goals and missions, and the second is to identify the prime-value activities to be performed by use of PROFS. The rest of this guide gives the steps for using FLAG in implementing PROFS. The key to the approach is the use of prime-value activities. Therefore, you may want to refer to this section as you use the following ones.

## Implementation Resources

FLAG also depends directly upon the availability and wise use of four resources:

- Commitment**     The primary resource represented by the administrative leadership is a *commitment* to the process of change and growth.
- Training**        The *training* of PROFS users not only is absolutely essential, but must be carefully planned and controlled. A good implementation will target the training and direct it to build skills that will be put to heavy use right away and will minimize the requirement to repeat training.
- Computer**        The leadership responsible for system administration must supply the the *computer* resources necessary. Not only work stations, printers, and other necessary peripherals must be readily available, but also any needed special PROFS forms and software tailoring.
- Effort**            The target group or department will be called on to put forth the extra *effort* necessary to change from old work styles and habits to the use of PROFS. Without their willing effort, the implementation cannot succeed.

## Steps Required for Implementation

Now that you understand the three building blocks and the four categories of implementation resources, you are ready to begin the process of implementing PROFS with FLAG. The implementation will proceed smoothly if you follow these steps:

1. Be sure to understand the problems involved in managing change.
2. Develop an understanding of the types of effects PROFS will have.
3. Identify the implementation team.
4. Have an executive overview meeting.
5. Develop internal PROFS materials and a PROFS demonstration.
6. Identify the target group.
7. Make sure the target group is represented on the implementation team.
8. Meet with the target group to familiarize the members with PROFS, encourage commitment, and solicit suggestions.
9. Survey the target group to find key users and opportunities for improvement.
10. Have a survey review meeting to *identify* prime-value activities to be implemented for the key users in the target group.
11. Hold a meeting with key users to *define* the prime-value information-handling activities.
12. Develop a building-block plan.
13. Put required computer resources in place.
14. Train users.
15. Monitor results.
16. Resolve any problems quickly.
17. Evaluate both successes and failures.
18. Identify new target groups to be brought onto PROFS.
19. Repeat steps 7 through 18 for each target group addressed.

The next section discusses these steps in detail.

## Understanding the Management of Change

When you make a commitment to PROFS you will also be making a commitment:

- To change the work habits of professionals
- To change many standing operating procedures
- To change the nature of a large amount of the information-handling in the firm

Some of these changes can be brought about very easily. For others, executives will have to recognize the added power and potential of PROFS, abandon traditional practices, and search for new ways to solve problems and to organize work.

This guide will provide some guidelines for bringing about change and implementing PROFS successfully. These guidelines reflect lessons learned in implementations in several firms. Management must be committed enough to PROFS to bring wisdom and experience, flexibility and creativity to bear in finding new ways to use PROFS to improve the flow of work. Management should recognize that three elements are important if change is to take place:

- *Insight is critical.* The guiding principle of change should be the determination to succeed in bringing about certain results. It is especially important that past practices not constrain the trial of new methods.
- *Change cannot be completely determined beforehand.* Rigid blueprints for change usually will not succeed. New experiences must be evaluated to suggest improvements and alternatives. New methods must be judged in terms of the end products.
- *Change is a process, not an event.* The introduction of PROFS is an important part of the process of improving professional productivity in the firm. However, PROFS itself is only a catalyst for that improvement. It must be implemented with regard for people's concerns. Professionals may resist change to long-standing, comfortable work habits. Furthermore, the social context of the office is very sensitive to changes in information-handling technologies. Thus, it is very important to encourage the cooperation and participation of everyone involved in implementing PROFS. The cooperation, commitment, and involvement of the users are crucial to success.

The best way to get people to change their work styles, habits, and attitudes is to actually get them to use the system. The building-block approach will guide you so that when users begin to use PROFS, there will be quick and visible benefits for them and their department almost from the first day.

## Understanding How PROFS Will Improve Work

This guide stresses improving individual and organizational productivity through the use of PROFS. The implementation process is built around the diagnosis of areas that can be improved and the development of PROFS information-handling activities designed specifically to bring about those improvements. A good implementation of PROFS will yield direct and obvious improvements in critical or mission-enhancing areas of work.

### Categories of Productivity

PROFS can influence productivity in a variety of ways. Professionals may find that they can communicate with others faster, or that they can produce much better technical reports. Organizations may reflect other benefits. For instance, the use of the calendar function may reduce the time required to call a meeting. Also, the organization may find that much more information can be brought to bear on a problem. These are just a few examples of the many positive effects that firms are deriving from PROFS.

PROFS, then, can benefit both individuals and the organization as a whole. It can also facilitate two distinctly different types of improvement, in *efficiency* and *effectiveness*:

<b>Efficiency</b>	This includes any improvement in speed, quantity, or extent of work. Such things as completing work faster, meeting more deadlines, having more time for productive work, cutting down on waste, and getting more work out are included.
<b>Effectiveness</b>	This includes any improvement in quality, thoroughness, and overall value of the work. For example, increased accuracy, improved proposals, less need to follow up with explanations, and more responsiveness all reflect improvements in effectiveness.

Thus, PROFS can actually improve work in four ways:

Area of benefit	Type of benefit	
	Efficiency	Effectiveness
Individual	I	III
Organizational	II	IV

In pursuing benefits from PROFS it is very important to keep these four categories in mind. In particular, be aware of the tradeoffs between efficiency and effectiveness. Effectiveness may often be achieved only by relaxing the need to make large strides in efficiency. Getting work completed faster does not always make it better. Also, organizational benefits must not be gained at excessive expense in individual benefits. Users will persist in trying and using new methods only if they themselves benefit.

The improvements are not all mutually exclusive; some benefits may be achieved jointly. For instance, pursuing a category II benefit, such as reduction of departmental backlogs, may also increase organizational responsiveness, a category



IV benefit. On the other hand, some benefits may be achieved only at the expense of others. For example, more complete coordination of work in the organization might be achieved by having everyone take a few extra minutes several times a day to update his or her PROFS calendar. The actual process of updating individual calendars costs each person a little time, and thus might actually subtract from improvement in category I. However, many more benefits would accrue in category IV, where the improvement is highly valued.

## Professional Productivity

Of course, PROFS is aimed most directly at eliminating obstacles to professional productivity. Inadequate tools for information-handling and communication, for instance, often hamper professionals in their efforts to perform activities that are directly related to their expertise and that are of high value to the firm. Although professionals are hired and valued by the firm for their knowledge, judgment, and experience, they often spend less than half of their time on work that requires this expertise. The rest too often has to be spent on activities that are:

- *Unproductive.* This includes time spent traveling, waiting for others, waiting for information, and trying to get someone on the telephone.
- *Clerical.* These activities, often performed by professionals, are productive only at a clerical level. They include making travel reservations, filing, making copies, and typing reports, forms, and documents.
- *Quasi-professional.* Professionals often must work on activities that require interpersonal skill or some specialized knowledge, but are performed inefficiently because of inadequate administrative or clerical support. Included might be searching for information, expediting a process or order, or arranging a meeting.

These three types of activities, each reflecting drains on the professional's time, are called *secondary* activities. Every time a professional must perform a secondary activity, the time available to perform *primary* activities is diminished, and an opportunity for professional productivity is lost.

Even when performing primary work, the work that they *should* be doing, professionals may judge many of their results to be less than fully successful or effective. Often this is because of the unavailability of required information, the lack of requisite information-handling tools, and the constraints of them.

From the standpoint of a professional, the quality of work is constrained by the information and communication tools available. The quality of information-handling tools will be reflected in the quality of professional work:

- *Highest quality* is any work that requires professional skill and expertise and is finished in a manner that fully reflects the skills, knowledge, and judgment of the professional. This is work that the professional is proud of, without reservations, and that reflects the use of fully adequate information-handling tools.
- *Moderate quality* is professional work that is acceptable, but has been completed with less than 100% effectiveness, mostly because the needed information was obtained late or not all or because there was no time to sort through a volume of information to find what was needed. Thus, work of moderate quality reflects limited information-handling tools.

- *Poor quality* is professional work finished but unacceptable, for the same reasons.

Many professionals find that from 25% to 50% of their primary work falls into the moderate- or poor-quality categories. Improvements in the handling and communication of could contribute substantially to their effectiveness.

PROFS was designed to:

- Diminish the requirement for professionals to perform nonproductive work by eliminating the causes of and need for some of that work.
- Help professionals eliminate the need for some clerical work.
- Provide computer assistance for clerical tasks that cannot be easily or realistically eliminated. This reduces the burden of performing these tasks.
- Provide a means to expedite many quasi-professional tasks.
- Improve the handling of all information, especially special, one-of-a-kind information that professionals must handle.
- Ease the problems of catching up with and exchanging information with other professionals.

In these ways PROFS gives each professional the tools to reduce secondary, nonproductive work and to use the time and effort thus saved for highest-quality primary, productive work. Furthermore, PROFS makes professional information-handling activities more timely and successful.

## An Implementation Team

If your firm is typical, one person or perhaps a small group of people will act as the office systems advocates. These people are innovators, who firmly believe in the power of office systems and therefore promote the use of PROFS. Often these advocates have been responsible for studying office system alternatives, have worked in data processing, or have indirect links to data processing.

This enthusiastic corps of people is essential, but not usually sufficient in itself, for a thorough implementation of PROFS. You will also need to form an implementation team that more broadly represents the resource requirements and the target users. This team acts as:

- Steering group
- Sounding board
- Goal-setting body
- Project monitor

The team also makes sure that important people are kept informed during the implementation.

## Team Membership

A good PROFS implementation team will be able to gain the help and cooperation of people from several parts of the firm. Usually, four key areas have to be considered and represented in the team:

*Administrative leadership.* This is the focal point for all PROFS activities within the firm. The administrative leadership must make procedural reviews and changes, determine how effectiveness and productivity will be judged, provide and coordinate implementation resources, and be accountable for the implementation.

*Education.* Training materials and classes tailored to users' needs should be devised, scheduled, delivered, and followed up on. An in-house training and assistance team is a very important part of the implementation.

*System administration.* Such things as the development of PROFS forms, special menu selections and other custom tailoring of the software, and other computer systems and programming considerations need to be arranged for. Work stations, printers, direct access storage, and any other hardware in support of PROFS must be provided.

*User representation.* The users or the target user group should be represented so that they have a clear voice in any decisions that will affect them and so that they will be kept as informed as possible about what is required of them. Making the users an integral part of the process will lead to a better, quicker, and more self-sustaining implementation, and also will facilitate needed feedback to the implementation team.

## Considerations for Administrative Leadership

The firm's overall *commitment* to office systems should be reflected in the administrative leadership given to the PROFS implementation process. By using the planning methods described in this guide, management can ensure that PROFS will

be a success. At the same time, if management is willing to find new and better administrative procedures that take advantage of PROFS features, the potential for benefits from PROFS will be even greater.

The administrative leadership must be directly cognizant of all the steps required for implementation. This may require assigning leaders who will be accountable for the success of individual departmental efforts or of certain PROFS information-handling activities or goals.

Finally, the administrative leadership should be aware of the importance of the decisions regarding education, system administration, and hardware resources. These three implementation resource areas should be carefully coordinated so that they support and encourage the building block implementation plan.

The administrative leadership should consist of one or more of the following people: an overall PROFS project coordinator, and the division head and major group heads or their representatives.

### **Considerations for the PROFS Educator**

This guide provides a method for designing an implementation that enables education to be targeted very efficiently. In combination with system tailoring, PROFS education should be directed at first establishing competency only for very specific information-handling activities to be performed on PROFS by the user.

One aim of PROFS education should be to get users onto PROFS with as little time spent in training as possible. Many key executives will have as little as 30 minutes to spend in this training. Therefore:

- Be specific; train people only on what they will use immediately.
- Keep information-handling activities as simple as possible.
- Expect to be on call and to follow up.
- Build up the expertise of individuals by adding only small steps at a time to their skill base.
- As users gain skill, make sure they know how to use the manuals to discover things on their own.
- Supplement training with one-page handouts that can be kept at the work station for reference.

The one-page handouts should be planned so that they form a notebook of procedures to be kept at the work station. These handouts should be very specific to particular activities or applications, and must be very easy to follow. A well planned series of handouts can eliminate much of the burden of training.

Clerical and administrative workers may merit special attention. These workers will often form the backbone of efforts to get a meaningful flow of information onto PROFS. They may also act as PROFS local "experts" for some executives. Their training may have to be extensive, lasting several days. If this is the case in your firm, be sure to plan for the work interruptions and any resulting needs for temporary or substitute clerical help. Also, let the managers of these clerical and administrative employees know that their proficiency will build up gradually.

Finally, do not assume that target users are knowledgeable in the use of computers. Be prepared to teach the use of the keyboard, log-on and log-off, getting into and out of PROFS, using menus, and especially how to recover from errors and how to get back to the home panel. Don't let a target user have a frustrating experience, and don't think that things are simple or obvious.

The task of education for users should be headed by someone who has mastered PROFS completely and who has a background in training others. This person is an important part of the implementation team.

The following publications will be helpful to the PROFS educator:

*IBM Professional Office System: Educator's Notebook*, SC20-1962

*IBM Professional Office System: General Information Manual*, GH20-2493

*IBM Professional Office System: Primer*, SH20-5582

*IBM Professional Office System: User's Guide*, SH20-5503

*IBM Professional Office System: Quick Reference Guide*, SX20-2396

## **Considerations for the System Administrator**

System support is important to the PROFS implementation. In addition to the usual tasks of installing and testing the software, maintaining security, assigning passwords, and coordinating the placement of work stations and printers, the system administrator should provide support for any needed tailoring of PROFS. This will commonly include only the relatively simple chores of bringing up specialized forms and menu options.

Careful attention needs to be given to the use and placement of work stations and printers. This hardware must be placed so that it directly supports key users and important PROFS information-handling activities. Particular attention should be paid to make sure that those who must do extensive amounts, special, or confidential work on PROFS have their own work stations. A well planned implementation can be defeated by the lack or improper placement of hardware. Users cannot be expected to integrate a distant or inconvenient work station or printer into their work routines.

Finally, if your firm has a policy of billing for the use of computer time or resources, be sure to evaluate these charges as they affect the use of PROFS. A flat charge for the use of PROFS will usually encourage its greater use. A charge for connect time may discourage use, because professionals prefer to log onto the system once and stay logged on all day. A charge for computer resource units can also discourage users. Do not overlook the effect of these charges on PROFS.

Because of all these considerations, the systems administrator is a critical member of the PROFS implementation team.

The following publications provide more details on the role of the system administrator:

*Using the Professional Office System*, SH20-5604

*Using Line-Mode Support with the Professional Office System*, SH20-5607

*Quick Reference to PROFS*, GX20-2408

*Planning and Installing the Professional Office System, SH20-5603*  
*Managing the Professional Office System, SH20-5605*  
*Programmer's Guide to the Professional Office System, SH20-5606*

## **Considerations for the User Representative**

A member of the target user group should be appointed as the user representative very early during the planning stage, and trained as thoroughly as possible in the use of PROFS. The user representative will be responsible for identifying users' problems and for helping to solve them.

The user representative must participate actively in deciding how PROFS can best be put to use, who will be the key PROFS users, where the work stations and other hardware will be placed, and what the measures of success will be. The user representative must also be able to generate and sustain enthusiasm and involvement among the users and to encourage suggestions and criticism.

## Executive Overview Meeting

A successful PROFS implementation will require the support of upper management. The executives must have a clear understanding of what PROFS does, how it works, and how it should be implemented to get the greatest benefit. This information is usually best conveyed in an *executive overview meeting*.

The executive overview meeting should occur early in the course of the PROFS implementation. It should be organized by the person with the primary administrative responsibility for implementing PROFS. Usually, this same person chairs the implementation team.

The following executives should attend the meeting:

- Data processing or information systems director
- Directors of any candidate target groups
- Directors of any divisions or major units involved
- Any other key executives who have interest and responsibility either in data processing or in the candidate target groups

The following is a suggested agenda for the meeting:

- An overview of PROFS, its functions, and how it works
- The building-block approach
- Target user group missions and prime-value activities
- Implementing resource requirements
- Understanding how PROFS will improve work
- The function of the implementation team
- Steps required for implementation
- Discussion of the expectations of the executives
- Requirements for checkpoints and follow-up with the executives

Be sure that the members of the implementation team are present at the executive overview meeting so that they all understand the priority placed on the successful use of PROFS. Also, be certain that the implementation team leaves the meeting with a clear understanding of the executives' expectations.

The executive overview meeting will set the tone for carrying out the PROFS implementation and will be the basis for generating support and enthusiasm among the key managers. Therefore, take the time to be well prepared. Also, your attitudes toward PROFS and the implementation process will be contagious; so be sure that your presentations at the executive overview meeting are interesting and enthusiastic.

## Developing PROFS Materials and Demonstrations

Although PROFS is very simple to understand and use, the implementation team will find that potential users like to have explanatory materials and PROFS examples that are closely related to their jobs. The following steps are recommended:

- Start by using PROFS with the implementation team and with others who have a direct interest in the implementation process. You may wish add a few staff members to this group if they show the desire. Such experience is invaluable because it gives the implementation team very specific knowledge of PROFS, what it can do and how it works. This will help the team answer questions, resolve problems, and gain the respect of the users in the target group.
- Develop a one-page summary of PROFS to hand out to the prospective users. This should include a brief description of PROFS functions and a statement about the importance of PROFS for improving professional productivity in the firm. The summary should also identify the implementation team and let the target group users know that they will be requested to describe certain aspects of their job. A sample questionnaire for this purpose is provided in this guide.
- Target users need to see PROFS in action. Prepare some sample documents, notes, files, and calendars on PROFS to use in a demonstration. These should be closely related to the firm and, if possible, the target group's work.
- One-page "miniguides" to PROFS should be developed as aids for performing specific tasks or applications on PROFS. These should be distributed one at a time and kept in a notebook at the PROFS work stations.

Much of this explanatory material has already been prepared by IBM. You may wish to use this material as is, or you may want to make it specific to your firm's situation.



## Identifying the Target Group

It is very important to concentrate the first few implementation efforts on a target group or department. The most important criterion in selecting the target group is a willingness to try new methods. You may want to start with a group that already uses data processing. However, eventually you will have to consider the problems of introducing PROFS to professionals who have not used computers in their everyday work. Therefore, even if you aim at a computer-oriented group as your first target, you probably want to identify a group that is not computer-oriented as a concurrent or second target group.

The early target groups should be chosen by one or more of the following criteria:

- Willingness to try new methods
- Enthusiasm
- Room for improving professional productivity
- Desire to increase effectiveness
- Eagerness to use the computer
- Willingness to learn how to use the system
- Willingness to have their job performance monitored

Remember, the first few groups that become PROFS will become your company's foundation for future users. Therefore, the first target groups must be chosen with great care.

## **Represent the Target Group in the Implementation Team**

This is an implementation requirement that cannot be minimized. As you implement PROFS you will soon recognize that many eyes are looking at the results. The best way to let the target group know what is expected of them and to ensure that feedback from the target group is immediate is to include them on the implementation team.

If the target group is not actively represented, you will risk not understanding their needs; this may create an atmosphere of alienation. Ultimately, you will risk the success of the implementation. Therefore, do not underestimate the value of involving the target group early and thoroughly.

## Meet to Discuss the Plans and Goals with the Group

This is the first time that specific information will be gathered from the group. (You may actually want to start with a preliminary meeting with the department or group head.) The group meeting should be conducted as follows:

- Just before the meeting, give the group a one-page handout describing PROFS.
- Demonstrate PROFS to the target group.
- Discuss the use of information in the department:
  - What information is used regularly?
  - What type of information is used on a special or custom basis?
  - Where does the information come from?
  - What are the typical communication patterns in the group?
  - How do they use the information they get?
  - What are the control points for information?
  - What information do they produce regularly?
  - What types of information do they produce to fulfill special requests?
  - Where do the information and reports go?
- Discuss the nature of the improvements that can be expected from PROFS.
- Discuss the nature of the commitment that the target group must make in order to succeed.
- Discuss the three building blocks for FLAG:
  - Access
  - Intensity
  - Prime value
- Inform the group that they will be requested to complete a survey and discuss the survey questions.

After the meeting, be sure to summarize the results and send a copy of the summary back to the department head for review. You will probably want to meet with the department head at this time to make sure you share the same view of the work situation.

## Survey the Target Group Professional Staff

The PROFS Target Users Survey is the key to developing the final plans for implementation. It has the following purposes:

- Identify professionals who need *access* to one another.
- Identify professionals who regularly have *intensive* information-handling requirements.
- Develop a work activity profile of the professionals in the department.
- Get perceptions of the amount of time and effort that professionals spend on *secondary* work.
- Get perceptions of how well the information-handling aspects of *primary* work are currently being supported.
- Find out who may be uncomfortable using the computer.

You may wish to develop a survey on your own, using a similar format.

## Analyzing the PROFS Target Users Survey

The PROFS Target Users Survey will give you information about each user and the target group as a whole, in six different areas:

- *Access*: The difficulty in getting hold of others for the exchange of information
- *Intensity*: The level, importance, urgency, and quantity of information handled
- *Communication contacts*: Identification of the organizational level at which most communication is occurring
- *Perceived productivity*: The perceived efficiency and quality of the work of the professionals
- *Activity profile*: A picture of the typical workday of the professionals
- *Computer experience*: The level of experience each professional has with a computer and a keyboard

The PROFS target user survey was not designed for making before-and-after measurements or for performing a cost-benefit analysis. Precise measurement of increase in productivity and cost comparisons would require more rigorous measurement methods, outside the scope of this guide.

### Identifying Key Users in the Target Group

Although PROFS will be introduced to the entire target user group, including both professionals and administrative support personnel, it is necessary to identify *key users* within the group so that the implementation can be focused and properly managed for the greatest benefit to the firm.

A key user is any professional in the target group who has a sizable requirement to use PROFS to overcome barriers to information-handling and communication. A key user is generally a professional who must communicate extensively with others who are difficult to get hold of, and who is a control point for much important information. The PROFS Target Users Survey will identify key users as those who have high *access* and high *intensity* scores.

The access score is derived for each user by simply adding the number from each checked response in Section A on the Survey. The score can be interpreted as follows:

*Access requirement index:*

- 20 or above: High access requirement
- 12 to 20: Moderate access requirement
- 11 or below: Low access requirement

The intensity score for a user is the total number of times that user marks the column "Agree" in Section B. The score can be interpreted as follows:

*Intensity Index*

- 7 or above: High intensity of information handling
- 4 to 7: Moderate intensity of information handling
- 3 or below: Low intensity of information handling

The *key user index* is then the *access requirement index* times the *intensity index*. That is,

$$\text{Key user index} = (\text{access requirement index}) \times (\text{intensity index})$$

The key user index can be interpreted as follows:

*Key user index*

- 100 and above: Definitely a key user
- 60 to 100: Very likely a key user
- 20 to 60: Moderately likely a key user
- Below 20: Probably not a key user

Key users are all those in the target group with high key user index scores. For example, you may wish to choose the professionals with scores in the top 40%. Alternatively, every professional with a score of 60 or more may be considered a key user.

There is one more consideration in identifying key users. The PROFS implementation must be capable of connecting key users with their required communication contacts. For instance, if the initial PROFS implementation will connect users only within a department, a user whose main need is to communicate outside the department will not benefit until the implementation is expanded.

Section C helps to identify the scope of each professional's communication contacts. This section can be used to help ensure that key users selected from the target group will benefit quickly from PROFS. This is done by selecting as key users those whose communication contacts are serviced by the PROFS implementation. Thus, if the implementation is initially in only one department, choose key users from among those who indicate that they most often communicate with others in the same department. If possible, you should also improve the implementation by bringing critical communication contacts onto PROFS early, even if they are not in the same department.

On the other hand, if the PROFS implementation is already spread throughout the company, almost all communication contacts except those outside the company will be served, and there may be little need to eliminate professionals from the key user group on the basis of their communication requirements.

These analyses will lead to the identification of the key users in the target group. Depending on the size of the group, the key users will generally be a subgroup of about 20% to 40% of the target group. Once identified, they are the focus of much of the implementation effort.

## Analyzing Perceived Productivity of Professionals

Section D of the PROFS Target Users Survey provides two indicators of how professionals perceive their own productivity: the *efficiency improvement index* and the *effectiveness improvement index*. This part of the survey is important because professionals who already perceive that much of their time is wasted and who feel that they could improve the quality of their own work will generally be eager to invest effort in the PROFS implementation. These sections of the survey do not substitute for rigorous before-and-after measurement tools, nor are they meant as part of a formal productivity measurement process. They are meant only to give the implementation team an idea of how to proceed.

The *efficiency improvement index* measures how much time and effort professionals feel they waste. The index is calculated from question 1 for each professional, as follows:

$$\text{Efficiency improvement index} = ([2 \times A]/3) + (B/2) + (C/3)$$

where

A = perceived percentage of time that is completely unproductive

B = perceived percentage of time that is clerical

C = perceived percentage of time that is quasi-professional

For example, if the perceived percentage of time that is completely unproductive is A = 15%, the perceived percentage of time that is clerical is B = 10%, and the perceived percentage of time that is quasi-professional is C = 12%, then the efficiency improvement index is:

$$([2 \times 15\%]/3) + (10\%/2) + (12\%/3) = 10\% + 5\% + 4\% = 19\%$$

The index does not assume that all unproductive, clerical, and quasi-professional effort can be converted to fully professional effort. Rather, only two-thirds of the unproductive effort, half of the clerical effort, and one-third of the quasi-professional effort are considered recoverable. Of course, an excellent PROFS implementation may be capable of higher levels of recovery.

An efficiency improvement index of between 15 and 25 is fairly common. For instance, an efficiency improvement index of 20 would indicate that the professional perceives that about 20% of the workday can be converted from nonprofessional to professional activities.

Question 2 of Section D is concerned with the quality of work more of work more than the quantity. The term “effectiveness” is used to reflect all the quality aspects of performing professional work. In particular, this question asks professionals to judge the quality of their own work as it may be constrained or limited by the lack of adequate information-handling and communication tools. Question 2 is analyzed by calculating the effectiveness improvement index:

$$\text{Effectiveness improvement index} = 100 \times [(B/3) + (C/2)] / (A + B + C)$$

where

A = perceived amount of work that has high-quality information-handling support

B = perceived amount of work that has moderate-quality information-handling support

C = perceived amount of work that has poor-quality information-handling support

For example, if the perceived amount of high-quality support is A = 3, the perceived amount of moderate-quality support is B = 2, and the perceived amount of poor-quality support is C = 1, then the effectiveness improvement index is:

$$100 \times [(2/3) + (1/2)] / (3 + 2 + 1) = 100 \times [7/6] / 6 = 19$$

The effectiveness improvement index gives an estimate of the extent to which PROFS can help to raise the quality of professional work for each individual. It does not indicate that more professional work will be accomplished, only that there is potential for improving professional effectiveness by improving the information-handling tools available to professionals.

An effectiveness improvement index in the range of 15 to 25 is usual. For example, an effectiveness improvement index of 20 can be taken to mean that about 20% of the moderate- and poor-quality support can be raised to high quality by the successful implementation of PROFS. The work of these professionals will reflect this improvement.

To calculate the average efficiency improvement index and the average effectiveness improvement index, first simply calculate both indexes for each professional. Then add all the efficiency improvement indexes and all the effectiveness improvement indexes together, and divide each by the number of professionals responding to the survey. That is, calculate the mean for each index.

Once the mean or group average for each index is calculated, the average efficiency improvement index can be compared to the average effectiveness improvement index. If the average efficiency improvement index is substantially larger than the average effectiveness improvement index, the PROFS implementation should probably be concentrated on saving professional time and effort being wasted on nonprofessional activities. By contrast, if the average effectiveness improvement index is substantially larger than the average efficiency improvement index, the PROFS implementation should concentrate on such things as improving the ability to handle information, improving communication, and overcoming roadblocks to high-quality professional work.

Both the average effectiveness improvement index and the average efficiency improvement index can be used to help set the target user group's goals for using PROFS. These indexes, however, show only perceptions, not actual work patterns or outcomes. And they are not additive. An average effectiveness improvement index of 10 and an average efficiency improvement index of 15 would not sum to an overall improvement index of 25. Simultaneous improvement in efficiency and



effectiveness is not always feasible; improvement in one may actually reduce the possibility for improvement in the other. If you do wish to combine the two, add them together and then divide by 2:

$$\text{Overall improvement index} = (\text{efficiency improvement index} + \text{effectiveness improvement index})/2$$

For example, an average efficiency improvement index of 14 and an average effectiveness improvement index of 10 would yield:

$$\text{Overall improvement index} = (14 + 10)/2 = 12$$

So an overall improvement of 12% that combines efficiency and effectiveness would appear to be a reasonable goal in this particular example.

## Job Activity Profile

It is helpful to get a picture of the job activities of professionals in the target group. You can use this information in several ways, including:

- Suggesting areas of PROFS use
- Comparing the activities of professionals in several departments
- Monitoring changes in job activities after introducing PROFS
- Estimating potential time savings from PROFS

*Areas of PROFS use.* The job activity profile provides estimates of how much time professionals are spending in a variety of activities to which PROFS can contribute directly. For example, if much time is spent in meetings, the PROFS calendar can be important for scheduling. The PROFS document function can be used to send agendas or information before a meeting and minutes after a meeting. In this way the job activity profile can be very helpful in finding the best uses of PROFS.

*Comparing activities.* Departments that have professional job activity profiles very different from those in other departments may be very good candidates for target groups. For instance, if the professionals in a department have a heavy typing load because of inadequate clerical support, PROFS can ease the load.

*Monitoring changes.* Throughout the course of a PROFS implementation, the job activity profiles of professionals will change. You may wish to monitor these changes on a quarterly or semiannual basis. This will help determine when new plateaus are reached, and should provide feedback on how well PROFS is being integrated into the daily work routine.

*Estimating potential time savings.* Many companies have used job activity profiles to estimate the improvements to be gained from PROFS and other office systems. You can take advantage of these results by using the representative *improvement factors*.

An *improvement factor* is the percentage by which the time spent on a particular activity can be reduced by introducing office systems technology such as PROFS. The actual time saved will depend on how much the particular employee spends working (the percentage of time spent) in the various listed activities and on the office systems already in use.

## Improvement Factors for Job Activities

Activity	Typical improvement factors*
<b>Creating documents</b>	
Writing (including revising, editing, filling in forms)	20
Typing	40
Dictation (to secretary or machine)	20
Proofreading (documents that have been typed)	20
<b>Communicating</b>	
Reading (exclude proofreading, searching, and mail)	10
Telephone	20
Meetings (scheduled or unscheduled)	10
Conferring	50
<b>Analyzing</b>	
Evaluating/calculating	0
Planning/scheduling	20
Using a terminal	0
<b>Administering</b>	
Handling mail	50
Filing	50
Copying (including walking to and from, waiting)	60
Retrieving files	60
Searching for information	50
Traveling	10
Collating/sorting	0
Other (include any other activity)	X (depending on the particular activity)

It is recommended that you base your calculations on an eight-hour workday, although many professionals work far beyond eight hours a day or forty hours a week. You should also adjust the improvement factors to reflect the particular situation in a department.

Increasing some improvement factors may be in order if current office procedures and information processing are ineffective. For example, if:

- Typewriters rather than word processors are in use.
- Copiers are inconvenient or unavailable.
- Telephone services, including message taking and call forwarding, are not available.
- Filing procedures are manual and inefficient, or professionals keep most of their own files.

Some improvement factors might need to be decreased if:

- IBM word processing equipment is already in use.

\* Office Systems Planning Customer Guide, G320-6812, page 94.

- Data processing or word processing terminals and supporting communication facilities are already in use.

Potential Time Savings Worksheet

( S A M P L E )

Section 1. Employee category: Professional

Department/functional unit: \_\_\_\_\_

Section 2. Potential time savings

Activities	A % of Time Spent	B Improve- ment Factor	C % of Total Time Saved	D Total
<u>Creating documents</u>				
• Writing	<u>18</u>	x <u>20</u>	= <u>3.6</u>	
• Typing	<u>-</u>	x <u>40</u>	= <u>-</u>	
• Dictation	<u>1</u>	x <u>20</u>	= <u>0.2</u>	
• Proofreading	<u>2</u>	x <u>20</u>	= <u>0.6</u>	
Total time savings				<u>4.4</u>
<u>Communicating</u>				
• Reading	<u>6</u>	x <u>10</u>	= <u>0.6</u>	
• Telephone	<u>11</u>	x <u>20</u>	= <u>2.2</u>	
• Meetings	<u>7</u>	x <u>10</u>	= <u>0.7</u>	
• Conferring	<u>1</u>	x <u>50</u>	= <u>0.5</u>	
Total time savings				<u>4.0</u>
<u>Analyzing</u>				
• Evaluating and calculating	<u>10</u>	x <u>-</u>	= <u>-</u>	
• Planning and scheduling	<u>3</u>	x <u>20</u>	= <u>0.6</u>	
• Using a terminal	<u>10</u>	x <u>-</u>	= <u>-</u>	
Total time savings				<u>0.6</u>
<u>Administering</u>				
• Handling mail	<u>3</u>	x <u>50</u>	= <u>1.5</u>	
• Filing	<u>3</u>	x <u>50</u>	= <u>1.5</u>	
• Copying	<u>1</u>	x <u>60</u>	= <u>0.6</u>	
• Retrieving files	<u>4</u>	x <u>60</u>	= <u>2.4</u>	
• Searching for information	<u>6</u>	x <u>50</u>	= <u>3.0</u>	
• Traveling	<u>2</u>	x <u>10</u>	= <u>0.2</u>	
• Collating/sorting	<u>-</u>	x <u>-</u>	= <u>-</u>	
Total time savings				<u>9.2</u>
Other (include any other activity)	_____	x _____	= _____	
Total time savings				_____
Total potential time savings				<u>18.2</u>

To use the Potential Time Savings Worksheet, follow these directions:

Section 1. Employee Category

- A separate worksheet should be used for each employee category for which you wish to determine potential time savings.
- Adjust the improvement factors to reflect the unique aspects of each category.

Section 2. Potential Time Savings

- In column A, enter the percentage of an employee's typical workday spent in each of the listed activities, as reported on the PROFS Target Users Survey.
- In column B, enter the percentage by which each activity time can be reduced. These are the improvement factors you have established for your organization.
- In column C, enter the result of the indicated computation. For example, for professionals who spend 18% of their time writing, an improvement factor of 20 results in an entry in column C of 3.6%.
- In column D enter the sum of the time savings in each activity area.
- Add the percentages in column D to obtain the total percentage of time in employees' typical workdays that can potentially be saved.

The example given in the illustration uses the typical employee activity profile for a professional and the typical improvement factors for IBM office systems.

A blank worksheet that you may copy has been included.

## **Additional Information**

Section F of the PROFS Target Users Survey provides two important pieces of information about the target users.

The first part concerns their experience with computers. Target users, especially key users who have had little or no experience with the computer or a keyboard, must receive individual attention. Many beginners are timid about using computers. Even those who are comfortable with a few applications they use repeatedly may not be willing or able to take on PROFS without first increasing their computer and keyboard skills. Do not assume that even the most basic information about the computer and the work station will strike a new user as simple. The keyboard itself can represent a formidable barrier to those who have little experience or confidence. Therefore, follow up thoroughly on Section F, questions 1 and 2.

Question 3 in Section F is a very general question about PROFS. It has been asked so that the implementation team can get feedback about how well PROFS has been introduced to the target group. Be sure to provide any requested information about PROFS, and to clear up any misunderstandings.

You may wish to add some of your own questions in this section. This can be an excellent way for you to get information on target users' opinions, requirements, and perceptions.

## **Target Group Review Meeting**

Once the implementation team has taken the time to examine the information from the PROFS Target Users Survey, it is essential that the target group receive feedback. A meeting with the target group and the implementation team is the best way to do this. This meeting is very important because it underscores the team's desire to maintain a good relationship with target users and helps to maintain the cooperation of the target group.

The purpose of this meeting is to go back over the questions and to present the aggregated or group average data. Do not review individual answers in this meeting. The PROFS target user survey thus serves as the basic outline for the meeting.

The last part of this meeting should be devoted to identifying the key users and setting up a meeting of key users. The implementation team must explain that the aim of the implementation is to involve all users but that the best way to start is to focus on the key users who have been identified by high access requirement and intensity indexes.

The next meeting with the key users will then be very important.

## Key User Meetings

Generally, key users are professionals who must communicate extensively with others who are difficult to get hold of and who are control points for much important information. The key user meetings will be centered on the concept of prime value, the third building block of a PROFS implementation. As was said earlier, an information-handling activity is of prime value if it:

- Directly affects the achievement of the group's or firm's goals
- Is central to the group's or firm's operation in that other information-handling activities can be built on it or added to it

With prime value as a criterion, the key meetings should serve to get the details about information-handling activities from the key users. The following questions should be used as the basis for at least two meetings with the key users.

### The First Key User Meeting

The first meeting should be used to determine the *missions* of the group, as they support the goals of the target group and the firm. Missions might include:

- Keeping track of projects
- Keeping interdepartmental records
- Keeping track of accomplishments
- Reporting requirements

Missions should be described in enough detail to provide the basis for enumerating the information required to meet them. Careful determination of missions will ease the process of determining prime-value information-handling activities.

### The Second Key User Meeting

Once the missions are determined, the second meeting can be held. This meeting is to determine the following information about each of the missions:

- What are the communication patterns among the key users and in the target group?
- What types of information are being communicated or requested?
- Are there any professionals outside of the target group who should be part of the implementation?
- What PROFS information-handling activities can have the most effect on the group's or firm's goals? That is, what are the mission-enhancing activities that can be boosted by using PROFS?
- For each candidate PROFS information-handling activity, what other important information-handling activities can be built on it or added to it later? That is, what mission-enhancing activities are also central?
- Are there special formats that can be prepared and placed on PROFS to make it more useful?

- Can PROFS be tailored any further to make it more useful?
- Is there a way to stage the PROFS implementation so that each professional only has to learn a small part of PROFS at a time?
- Who needs a work station in the office, and who can share a work station?
- What other hardware resources, such as printers, are needed?
- What will be the milestones against which the success of the implementation will be measured?
- Should some other computer-based information or service be made available along with PROFS to make the system more attractive or useful to the target group?
- Are there any loose ends or problems that have been overlooked?

During the meeting the key users should pick five or six information-handling activities that are of prime value and that can be assisted by PROFS.

For each prime-value activity, the leader of the meeting should complete a Prime-value Information-handling Activity Analysis Summary form.

This form is not to be handed out to the key users. It is meant only to be completed by the meeting leader for use as a planning tool for management.

## **The Outcome**

The outcome of the key user group meetings and the prime-value information-handling activity analysis should be the delineation of several PROFS-based prime-value activities for use in the target group. These activities will form the foundation for the use of PROFS and will be the basis of the value of PROFS to the target group.

After the second meeting you may wish to:

- Hold a third meeting to discuss and set the priority for the prime-value activities.
- Review the analysis with the implementation team.
- Report the results to upper management.



## The FLAG Plan

Now that the PROFS survey and the follow-up meetings have been completed, and the prime-value information activity analyses have been finished, the implementation team must prepare the final implementation plan.

FLAG is based on three building blocks, so called because they are developed after three key elements are examined during the planning process:

- Access
- Intensity
- Prime value

As a result of the key user meetings, the prime-value information-handling activities should be selected for implementation on PROFS. Because of the selection criteria, these activities will rank very high on the three building-block factors. However, the implementation plan itself has only started to take shape at this point.

The three building blocks are not only the foundation for a good implementation, but also the key to the wise allocation of implementation resources. In fact, the major part of the building-block plan is to bring the necessary resources together to facilitate the start-up and use of PROFS for the purpose of making the prime-value information-handling activities operational on PROFS. All the steps you have taken to this point, however, should make this easy.

Four key areas of implementation resources have to be considered:

- *Commitment: administrative leadership.* Assignments must be made. Procedural reviews and changes, as well as accountability and follow-up, need to receive attention.
- *Training: PROFS educator.* Training materials and classes tailored to the prime-value activities need to be devised and scheduled.
- *Computer: system administrator.* PROFS forms, user IDs and passwords, possible custom tailoring of the software, and other computer systems and programming considerations need to be weighed. Work stations, printers, direct access storage, and any other hardware need to be made available in support of the implementation.
- *Effort: group head.* The target group must be prepared to put forth the effort to make PROFS a success. Within the group, this should be managed just as any other group project would be directed and managed.

The success of a PROFS implementation depends directly on the careful provision and management of these four types of resources. The implementation team must be sure that a good plan for resource availability and delivery is developed and followed. This plan can be broken into four areas.

### **Commitment: Administrative Leadership**

The primary job of the administrative leadership and the implementation team is to get commitment from all the people involved. The best rule for the team to follow is to try to direct all its energy to making sure that the target group is completely supported in its effort to succeed with PROFS. Fading commitment is usually a

symptom that an implementation team has no clear agenda, has taken on too many projects, or has tried to expand its scope before its first real success. Making a plan, getting top management's approval, keeping the target group enthusiastic, involved, and informed, and following the plan through to the end are the most important things that the team can do.

## **Training: The PROFS Educator**

A good building-block plan will make it possible to train the professionals on specific functions so that they can get started. The rule here is simple: Train the users only in what can and will be used almost immediately, and follow up later.

Start with the prime-value activities whose implementation on PROFS will require the least training, such as those involving forms, notes, and calendars. Introduce the more sophisticated PROFS functions only after the professionals are comfortable with these easier functions.

If a complicated information-handling activity is to be performed on PROFS, be sure to "stage" its introduction. That is, break it into small pieces that can be easily learned and immediately put to use. Assist users to increase skill levels by building on successes at the earlier stages.

Finally, remember that many of those you are training are "fragile users." A fragile user is someone who has acquired just enough skill to use a few particular applications on the computer but who has not really acquired understanding enough to generalize that skill to new applications. Fragile users, rather than being eager to learn, are apprehensive about learning new computer applications because they believe they may become confused. A fragile user can be an executive, a professional, or a clerk; so be sure to be prepared to provide special attention and assistance at all levels.

Target your training, teach only what will be used right away, and build new applications on old skills. This will minimize the training required, and the need to repeat training.

A PROFS Help Desk or some other follow-up will probably be required. This can be organized in two basic ways. The first is to establish an actual help desk that users can call to resolve problems. This should be staffed at all times by someone familiar enough with PROFS to answer most questions immediately, and the rest with minimum delay.

The second way to provide user help is to make sure that each department or location has at least one person who is well trained and acts as the departmental expert. This person should try to resolve problems locally, and should also have access to someone who can answer more difficult questions. The local expert can also be of great benefit in encouraging people to use PROFS.

## **Computer: System Administrator**

Computer resources should be delivered very early so that their introduction dovetails with the startup in the target group. Among the computer resources that should be provided are:

- Work stations
- Printers
- PROFS forms

- Software customization (if any)
- User IDs and passwords
- Assurance of adequate computer response
- Adequate direct access storage

PROFS will become an integral tool for every key user; therefore most key users should have their own workstations. Shared or pooled work stations not only are inconvenient, but prevent the performance of responsive and confidential work. Also they make the use of notes and calendars ineffective.

### **Effort: Target Group Head**

The target group should view PROFS as a valuable tool for increasing both speed and quality. The PROFS implementation must be treated as a project worthy of the target group's energy and its management skill.

## The Implementation Plan Checksheet

The following checksheet is a good way to ensure that you have prepared a good implementation plan:

Activity	Planned date	Completed date	Success Yes/No
<hr/>			
Before implementation			
A. Form implementation team			
B. Executive overview meeting			
C. Put implementation team on PROFS			
D. Develop PROFS demonstration			
E. Develop PROFS target group handout			
F. Meet with target group			
G. Survey target group			
H. Survey review meeting with target group			
I. Identify key users			
J. Key users meetings			
K. Identify prime-value activities			
<hr/>			
Implementation Startup			
A. Determine the following for each prime-value activity			
• Special forms			
• PROFS tailoring			
• Computer resources required			
• Training required			
B. Assign IDs and passwords			
C. Start training for key users			
D. Install necessary computer resources			
E. Install work stations			
F. Begin prime-value activities			
G. Train for more sophisticated activities			
H. Introduce additional prime-value activities			
I. Train others in the target group			
<hr/>			
Follow-Up			
A. Establish PROFS help desk			
B. Schedule monthly reviews with target group			
C. Review problems with implementation team			

## Follow-Up and Reviews

Once the target group is using PROFS, it is very important to get regular feedback from the group. This serves several purposes, including:

- To find out any new applications or information-handling activities that can be put on PROFS
- To get opinions about how PROFS has affected the work in the group
- To find out what the users like and dislike about PROFS
- To determine if training and support are adequate
- To determine if users feel that they have been supported and listened to by management
- To make sure there are no problems with the computer
- To surface any other information that might help improve the PROFS implementation

One good way to get this feedback is to hold monthly meetings. You may wish to involve everyone in the target group, or just the key users. Be sure to have the members of the implementation team at these meetings.

A PROFS *Survey of User Satisfaction* has been provided as an aid to follow-up activity. It covers the following topics:

- Perceived use of time
- Perceived information-handling support
- Functions of PROFS (utility and frequency)
- Support from management
- Training and documentation
- Computer support
- Additional information
- Other comments and suggestions

The PROFS survey of user satisfaction can be used to poll the target group periodically, say after the first three months and again after the first six months. The survey can be filled out in a monthly meeting or sent out separately to users.

The PROFS survey of user satisfaction was not developed as a measure of the increase in professional productivity due to using PROFS, and cannot properly be used for that purpose. Acceptable measurement of improvement in productivity or of cost effectiveness requires more rigorous measurement methods, outside the scope of this guide.

The PROFS survey of user satisfaction is one good way to keep the users involved and to take the pulse of the progress of the PROFS implementation. It is analyzed in the following sections.

## Analyzing Perceived Use of Time

*Perceived use of time* (Section 2) is meant to yield some indication of how much faster and better the professionals believe they are using their time because of PROFS. To derive the perceived use of time improvement, total all the users' responses to each lettered question (except D) in turn, add these scores together, and subtract the score for question D; that is,

$$\text{perceived use of time improvement} = A + B + C + E + F - D$$

The perceived use of time improvement can be interpreted as follows:

- 0 through 5: great improvement
- 6 through 10: some improvement
- 11 through 15: some problems
- 16 through 20: many problems

Perceived use of time improvement scores of 11 or more may be an early warning of problems. Scores of 10 or less generally indicate that the PROFS implementation is going well.

## Analyzing Perceived Information-Handling Support

*Perceived information-handling support* (Section 2) yields an indication of how much better the professionals believe they are handling information and doing the professional parts of their jobs because of PROFS. To derive the perceived information-handling support, add the scores for questions A through F; that is,

$$\text{perceived information-handling support} = A + B + C + D + E + F$$

The perceived information-handling support can be interpreted as follows:

- 6 through 12: great improvement
- 13 through 18: some improvement
- 19 through 24: some problems
- 25 through 30: many problems

Perceived information-handling support scores of 19 or more may be an early warning of problems. Scores of 18 or less generally indicate that the PROFS implementation is going well.

## Analyzing the Rest of the Survey

Sections 3 through 7 of the PROFS survey of user satisfaction are not meant to be totaled or to yield a summary score. Instead, the answers to each question should be tabulated to provide an understanding of:

- *Functions of PROFS*: Which PROFS functions are found to be most useful, and which ones are used most often. This section will give a good profile of the user patterns on PROFS. It can provide indications of where more training is required, progress to date, and areas of emphasis.
- *Management support*: The extent to which management encourages the use of PROFS, supports the integration of PROFS into the flow of work, and listens to suggestions and problems.

- *Training and documentation:* This section enables users to give feedback on the training and the support they have received. This should help to pinpoint weaknesses in training, documentation, and help resources.
- *Computer support:* The users' perceptions of computer resource availability, response, and reliability. Problems here should be quickly fixed. PROFS users will not be patient if they cannot get at their calendars, information, and files when they need them because of inconveniently placed work stations and printers, poor response time, or frequent system problems.
- *Additional information:* This section helps in determining the users' level of experience. It also solicits suggestions for other PROFS functions.
- *Other comments:* This final section is meant to solicit any comments or suggestions that users wish to make.

### **The Importance of Follow-Up**

The PROFS survey of user satisfaction and the monthly meetings are just two ways to make sure that feedback is derived from the PROFS users. In addition, the implementation team should try to stay in contact with the users so that a bridge of understanding is built.

When problems arise, the implementation team must make sure that plans are made and actions are taken to resolve them. The users will retain their enthusiasm and commitment only if they see that they are being listened to.

As positive or outstanding situations or examples arise, these instances should be publicized. Many of these positive examples will bring new applications or new prime-value activities to light. Thus, suggestions form the basis of growth and extension of PROFS as a fundamental work tool for professionals.

Do not overlook the importance of gathering feedback and of following up. It is time well spent.

## Conclusion

This guide provides a complete method for managing a PROFS implementation so that it will be successful. Throughout this guide, it has been stressed that good, people-oriented management is the key to success. Management can use technology such as PROFS correctly, for the overall benefit of the firm, or poorly, with few if any benefits. In the final analysis, PROFS is only a tool for improving the firm's performance, and a catalyst for change. Introducing PROFS successfully requires more than installing hardware and software. It requires setting goals for performance and altering the collective sight of the professionals. This can be accomplished only through good management.

Throughout, this guide has stressed involvement, commitment, and enthusiasm. The success of PROFS is based as much on the people it links together as on the technology itself. It is the people in your company who will make PROFS work for everyone.

We urge you to follow this guide carefully. It will help you bring about the success you are looking for. However, please keep in mind that any guide is just a guide. You will certainly encounter special circumstances that require new ideas, changed procedures, and different approaches.



## **Appendix: Survey Forms**

## PROFS Target User Survey

This survey is part of the PROFS (Professional Office System) work improvement project. The purposes of this survey are:

To obtain general information about the characteristics of your information-handling activities.

To provide data to help forecast potential office systems applications and requirements.

To determine a baseline from which the effects of PROFS can be measured.

Your estimates and opinions will be used to help shape the future office environment of your department and the firm.

Your answers will be kept strictly confidential. The study team will summarize and report the answers on a group basis only. However, we would like you to include your name on the front page so that you can be contacted by a member of the study team in case we need clarification and for the collection of additional data.

If you have any concerns, questions or suggestions about the survey, please contact:

Name: \_\_\_\_\_  
(Use ID if appropriate)

Date: \_\_\_\_\_ Telephone: \_\_\_\_\_

Job title: \_\_\_\_\_

Department: \_\_\_\_\_

Location: \_\_\_\_\_  
Building Floor Mail Drop

## ***Section A: Access to Others***

Please think about the information you must get to do your job and the information that others commonly need to get from you. This should include both formal and informal, informational and repetitive, and custom reports. It should not include incidental or trivial pieces of information.

For each statement, please check the one answer that best applies.

1. How often must you depend on others for information you need to obtain to do your job?  
 1. Not often  
 2. Now and then  
 3. Sometimes  
 4. Rather often  
 5. Very often  
 6. Continually
  
2. How much difficulty do you commonly have in getting hold of someone who has information you need?  
 1. Little or no difficulty  
 2. Some difficulty  
 3. A moderate amount of difficulty  
 4. Quite a bit of difficulty  
 5. A great amount of difficulty  
 6. An extraordinary amount of difficulty
  
3. How often must others depend on you as a source of information?  
 1. Not often  
 2. Now and then  
 3. Sometimes  
 4. Rather often  
 5. Very often  
 6. Continually
  
4. How much difficulty do you think others who need information from you commonly have in getting hold of you?  
 1. Little or no difficulty  
 2. Some difficulty  
 3. A moderate amount of difficulty  
 4. Quite a bit of difficulty  
 5. A great amount of difficulty  
 6. An extraordinary amount of difficulty

TOTAL  (Add the number from each checked response)

**Section B: Intensity of Information-Handling Activities**

For each statement, please check the one answer that best applies:

	Agree	Disagree
1. I must communicate often.	_____	_____
2. I do not have adequate clerical support.	_____	_____
3. I have a heavy backlog.	_____	_____
4. I must provide urgent information.	_____	_____
5. I handle a lot of special requests.	_____	_____
6. I must complete many forms or standard reports (one or two pages).	_____	_____
7. I need to keep many of my own files.	_____	_____
8. I often must double check to see that information I receive is accurate.	_____	_____
9. I must get information quickly.	_____	_____
10. Meetings use up much of my time.	_____	_____
Total number of responses	_____	_____

***Section C: Primary Communication Contacts***

Please consider the communication contacts that you have on your job. That is, who requests information from you, and whom do you get information from?

Please list those with whom you communicate most often:

Name	Department or location
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

**Section D: Perceived Productivity**

1. A professional's job activities generally fall into four categories. In your opinion, what percent of your time do you spend on the following types of job activities?

Activity	Percentage of time
A. Unproductive, such as: <ul style="list-style-type: none"><li>• Waiting for others</li><li>• Waiting for information</li><li>• Trying to get someone on the telephone</li></ul>	_____ %
B. Clerical, such as: <ul style="list-style-type: none"><li>• Making copies</li><li>• Filing</li><li>• Typing</li></ul>	_____ %
C. Quasi-professional, such as: <ul style="list-style-type: none"><li>• Searching for information</li><li>• Arranging meetings</li><li>• Expediting a job</li></ul>	_____ %
D. Professional, such as: <ul style="list-style-type: none"><li>• Analysis</li><li>• Project planning</li><li>• Report generation</li><li>• Meetings</li></ul>	_____ %

Note: Total of A, B, C, and D = 100%

2. For this part of the questionnaire, please think only about that work that you consider professional. That is, leave out any work that you consider to be completely unproductive, clerical, or quasi-professional.

Because of time constraints and the lack of adequate information-handling, the lack of means for communicating with others promptly, or the lack of other clerical or administrative help, your efforts may not be as well supported and facilitated as you would like.

Of all of your professional work, how much falls into each of the following categories because of the lack of adequate information-handling tools?

Circle 0 if none of your professional work falls into the indicated category, or 5 if all of your work falls into the indicated category; use 1, 2, 3, and 4 to indicate levels in between. Don't worry if the total is more or less than 5.

Level of information-handling support

How much

- |  | None | 0 | 1 | 2 | 3 | 4 | All |
|--|------|---|---|---|---|---|-----|
|  |      |   |   |   |   |   |     |
| A. Highest quality of support:<br>How much of your work is already very well supported by the information-handling and administrative tools available to you?  | 0    | 1 | 2 | 3 | 4 | 5 |     |
| B. Moderate quality of support:<br>How much of your work is supported in an acceptable but somewhat less than fully desirable way by the information-handling and administrative tools available to you? | 0    | 1 | 2 | 3 | 4 | 5 |     |
| C. Poor quality of support:<br>How much of your work is inadequately or poorly supported by the information-handling and administrative tools available to you?  | 0    | 1 | 2 | 3 | 4 | 5 |     |

**Section E: Job Activity Profile**

The extent to which you will benefit from PROFS may depend on the type of activities you perform during a normal work week. Many professionals have workload peaks and valleys, but please try to keep an average week in mind.

Enter your estimate of the percentage of time you spend in a week doing each of the listed activities. Do not be concerned if the total does not equal 100%, as there is probably some overlap among activities.

Activity	Percentage of time per week
<hr/>	
<u>Creating documents</u>	
• Writing (including revising, editing, filling in forms)	_____ %
• Typing	_____ %
• Dictation (to secretary or machine)	_____ %
• Proofreading (documents that have been typed)	_____ %
 <u>Communicating</u>	
• Reading (exclude proofreading, searching, and mail)	_____ %
• Telephone	_____ %
• Meetings (scheduled or unscheduled)	_____ %
• Conferring	_____ %
 <u>Analyzing</u>	
• Evaluating and calculating	_____ %
• Planning and scheduling	_____ %
• Using a terminal	_____ %
 <u>Administering</u>	
• Handling mail	_____ %
• Filing	_____ %
• Copying (including walking to and from, waiting)	_____ %
• Retrieving files	_____ %
• Searching for information	_____ %
• Traveling	_____ %
• Collating/sorting	_____ %
 <u>Other</u> (include any other activity)	_____ %



**Section F: Additional Information**

1. How much experience do you have with a standard typewriter keyboard?

Check the one that best applies:

- 1. Little or none
- 2. Some
- 3. A moderate amount
- 4. Quite a bit
- 5. A great amount
- 6. An extraordinary amount

2. How much experience do you have with the computer?

Check the one that best applies:

- 1. Little or none
- 2. Some
- 3. A moderate amount
- 4. Quite a bit
- 5. A great amount
- 6. An extraordinary amount

3. Do you want more information on PROFS?  No  Yes

If yes, please describe: \_\_\_\_\_

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4. Other comments and suggestions:

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Thank you for taking the time to complete this survey.

## Prime-value Information-handling Activity Analysis Summary

Date: \_ \_ \_

Group or department identification: \_\_\_\_\_

Information-handling activity:

Brief title: \_\_\_\_\_

Chief contact person: \_\_\_\_\_

General description:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### Prime value

What goals does this activity affect?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

What other information-handling activities can be supported easily as a result of performing this activity on PROFS?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Possible measures of success:

1. \_\_\_\_\_
2. \_\_\_\_\_

Information-handling activities

Input required:

Identification:

---

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Format or manner received: (attach forms if necessary)

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---

---

From:

---

---

---

Processing steps in the group (when and by whom):

1. \_\_\_\_\_  
Person responsible: \_\_\_\_\_
2. \_\_\_\_\_  
Person responsible: \_\_\_\_\_
3. \_\_\_\_\_  
Person responsible: \_\_\_\_\_
4. \_\_\_\_\_  
Person responsible: \_\_\_\_\_
5. \_\_\_\_\_  
Person responsible: \_\_\_\_\_

**Output**

Identification:

---

---

---

Form or manner received: (attach forms if necessary)

---

---

---

To:

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PROFS Value Added

The implementation team should define how PROFS can be used to improve the performance of the information-handling activity.

PROFS applications:

1. Function: \_\_\_\_\_  
Purpose: \_\_\_\_\_  
\_\_\_\_\_
2. Function: \_\_\_\_\_  
Purpose: \_\_\_\_\_  
\_\_\_\_\_
3. Function: \_\_\_\_\_  
Purpose: \_\_\_\_\_  
\_\_\_\_\_

Special forms or tailoring required (attach or describe):

1. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Training**

Training required on PROFS to implement this information-handling activity:

1. Description: \_\_\_\_\_  
\_\_\_\_\_  
Target: \_\_\_\_\_  
\_\_\_\_\_
2. Description: \_\_\_\_\_  
\_\_\_\_\_  
Target: \_\_\_\_\_  
\_\_\_\_\_
3. Description: \_\_\_\_\_  
\_\_\_\_\_  
Target: \_\_\_\_\_  
\_\_\_\_\_
4. Description: \_\_\_\_\_  
\_\_\_\_\_  
Target: \_\_\_\_\_  
\_\_\_\_\_

Priority and schedule

Priority for implementation:   \_\_\_ 1 Top  
                                  \_\_\_ 2 High  
                                  \_\_\_ 3 Moderate  
                                  \_\_\_ 4 Low

Desired date of implementation: \_\_\_ \_\_\_ \_\_\_  
Date to start training:       \_\_\_ \_\_\_ \_\_\_  
Date training to be completed: \_\_\_ \_\_\_ \_\_\_

Responsible member of implementation team: \_\_\_\_\_

# Potential Time Savings Worksheet

Section 1. Employee category: \_\_\_\_\_  
 Department/functional unit: \_\_\_\_\_

Section 2. Potential time savings	A	B	C	D
Activities	% of time spent	Improvement factor	% of total time saved	Total
<b>Creating documents</b>				
• Writing	_____	x _____	= _____	
• Typing	_____	x _____	= _____	
• Dictation	_____	x _____	= _____	
• Proofreading	_____	x _____	= _____	
Total time savings				_____
<b>Communicating</b>				
• Reading	_____	x _____	= _____	
• Telephone	_____	x _____	= _____	
• Meetings	_____	x _____	= _____	
• Conferring	_____	x _____	= _____	
Total time savings				_____
<b>Analyzing</b>				
• Evaluating and calculating	_____	x _____	= _____	
• Planning and scheduling	_____	x _____	= _____	
• Using a terminal	_____	x _____	= _____	
Total time savings				_____
<b>Administering</b>				
• Handling mail	_____	x _____	= _____	
• Filing	_____	x _____	= _____	
• Copying	_____	x _____	= _____	
• Retrieving files	_____	x _____	= _____	
• Searching for information	_____	x _____	= _____	
• Traveling	_____	x _____	= _____	
• Collating/sorting	_____	x _____	= _____	
Total time savings				_____
Other (include any other activity)	_____	x _____	= _____	
Total time savings				_____
Total potential time savings				_____

## PROFS Survey of User Satisfaction

This survey is part of the PROFS work improvement project and is meant for those who have been using PROFS as part of their work. The purposes of this survey are:

- To get your opinions about how PROFS has affected your job.
- To determine the quality of support you have gotten in learning and using PROFS.
- To find out what you like and dislike about PROFS.
- To determine which PROFS functions you use.

Your estimates and opinions will be used to help shape the future office environment of your department and the firm.

Your answers will be kept strictly confidential. The study team will summarize and report the answers on a group basis only. However, we would like you to include your name on the front page so that you can be contacted by a member of the study team in case we need clarification and for the collection of additional data.

If you have any concerns, questions, or suggestions about the survey, please contact:

Name: \_\_\_\_\_  
(Use ID if appropriate)

Date: \_\_\_\_\_ Telephone: \_\_\_\_\_

Job Title: \_\_\_\_\_

Department: \_\_\_\_\_

Location: \_\_\_\_\_  
Building Floor Mail Drop

### **Section 1. Perceived Use of Your Time**

Now that you have been using PROFS, in your opinion, how has PROFS changed your use of time during the workday?

- A. Compared to your workday before using PROFS, how much more or less of your workday is consumed now in unproductive activities, such as waiting for others, waiting for information, or trying to get someone on the telephone?

- 1. Much less time is consumed
- 2. Somewhat less time is consumed
- 3. About the same amount of time is consumed
- 4. Somewhat more time is consumed
- 5. Much more time is consumed

- B. Compared to your workday before using PROFS, how much more or less of your workday is now consumed in clerical activities, such as making copies, filing, and typing?

- 1. Much less time is consumed
- 2. Somewhat less time is consumed
- 3. About the same amount of time is consumed
- 4. Somewhat more time is consumed
- 5. Much more time is consumed

- C. Compared to your workday before using PROFS, how much more or less of your workday is now consumed in quasi-professional activities, such as searching for information, arranging meetings, or expediting a job?

- 1. Much less time is consumed
- 2. Somewhat less time is consumed
- 3. About the same amount of time is consumed
- 4. Somewhat more time is consumed
- 5. Much more time is consumed

- D. Compared to your workday before using PROFS, how much more or less of your workday is now consumed in professional activities, such as analysis, project planning, or report generation?

- 1. Much less time is consumed
- 2. Somewhat less time is consumed
- 3. About the same amount of time is consumed
- 4. Somewhat more time is consumed
- 5. Much more time is consumed

- E. Compared to your workday before using PROFS, how much more or less of your workday is now consumed in meetings?

- 1. Much less time is consumed
- 2. Somewhat less time is consumed
- 3. About the same amount of time is consumed
- 4. Somewhat more time is consumed
- 5. Much more time is consumed



F. Compared to your workday before using PROFS, how much better do you believe you are now using your time?

- 1. Much better
- 2. Somewhat better
- 3. About the same
- 4. Somewhat worse
- 5. Much worse

## ***Section 2. Perceived Information-Handling Support***

PROFS can help you handle information better while alleviating many communication problems. For the following questions, compare your work situation before and after you started using PROFS.

- A. Compared to your work situation before using PROFS, how much better do you believe you are able to store and retrieve information that you generate and use on your job?

1. Much better  
 2. Somewhat better  
 3. About the same  
 4. Somewhat worse  
 5. Much worse

- B. Compared to your work situation before using PROFS, how much easier is it to send information to others who are also on PROFS?

1. Much easier  
 2. Somewhat easier  
 3. About the same  
 4. Somewhat more difficult  
 5. Much more difficult

- C. Compared to your work situation before using PROFS, how much easier is it to get information from others who are also on PROFS?

1. Much easier  
 2. Somewhat easier  
 3. About the same  
 4. Somewhat more difficult  
 5. Much more difficult

- D. Overall, how much do you believe PROFS has added to your ability to respond to requests for information?

1. Much improvement  
 2. Some improvement  
 3. About the same  
 4. Somewhat worse  
 5. Much worse

- E. Overall, how much do you believe PROFS has added to your ability to meet deadlines?

1. Much improvement  
 2. Some improvement  
 3. About the same  
 4. Somewhat worse  
 5. Much worse

- F. Over all, how much do you believe PROFS has improved information-handling in your work situation?

1. Much improvement  
 2. Some improvement  
 3. About the same  
 4. Somewhat worse  
 5. Much worse

### **Section 3. Functions of PROFS**

PROFS has many functions that you may be using. For the functions given below, please estimate how useful each one is and how often you use each one.

#### **A. Accessing Your Own Personal Calendar**

1. How useful have you found this particular PROFS function?

- 1. Little or no use
- 2. Some use
- 3. Moderately useful
- 4. Quite useful
- 5. Of great use

2. How often have you used this particular PROFS function?

- 1. Not often
- 2. Now and then
- 3. Sometimes
- 4. Rather often
- 5. Very often

#### **B. Accessing the Calendar of Others**

1. How useful have you found this particular PROFS function?

- 1. Little or no use
- 2. Some use
- 3. Moderately useful
- 4. Quite useful
- 5. Of great use

2. How often have you used this particular PROFS function?

- 1. Not often
- 2. Now and then
- 3. Sometimes
- 4. Rather often
- 5. Very often

#### **C. Scheduling Appointments for Others**

1. How useful have you found this particular PROFS function?

- 1. Little or no use
- 2. Some use
- 3. Moderately useful
- 4. Quite useful
- 5. Of great use

2. How often have you used this particular PROFS function?

- 1. Not often
- 2. Now and then
- 3. Sometimes
- 4. Rather often
- 5. Very often

D. Set a Reminder

1. How useful have you found this particular PROFS function?

- 1. Little or no use
- 2. Some use
- 3. Moderately useful
- 4. Quite useful
- 5. Of great use

2. How often have you used this particular PROFS function?

- 1. Not often
- 2. Now and then
- 3. Sometimes
- 4. Rather often
- 5. Very often

E. Review In-basket

1. How useful have you found this particular PROFS function?

- 1. Little or no use
- 2. Some use
- 3. Moderately useful
- 4. Quite useful
- 5. Of great use

2. How often have you used this particular PROFS function?

- 1. Not often
- 2. Now and then
- 3. Sometimes
- 4. Rather often
- 5. Very often

F. Send a Note

1. How useful have you found this particular PROFS function?

- 1. Little or no use
- 2. Some use
- 3. Moderately useful
- 4. Quite useful
- 5. Of great use

2. How often have you used this particular PROFS function?

- 1. Not often
- 2. Now and then
- 3. Sometimes
- 4. Rather often
- 5. Very often

G. Send a Message

1. How useful have you found this particular PROFS function?

- 1. Little or no use
- 2. Some use
- 3. Moderately useful
- 4. Quite useful
- 5. Of great use

2. How often have you used this particular PROFS function?

- 1. Not often
- 2. Now and then
- 3. Sometimes
- 4. Rather often
- 5. Very often

H. Prepare a Document

1. How useful have you found this particular PROFS function?

- 1. Little or no use
- 2. Some use
- 3. Moderately useful
- 4. Quite useful
- 5. Of great use

2. How often have you used this particular PROFS function?

- 1. Not often
- 2. Now and then
- 3. Sometimes
- 4. Rather often
- 5. Very often

I. Search and Retrieve

1. How useful have you found this particular PROFS function?

- 1. Little or no use
- 2. Some use
- 3. Moderately useful
- 4. Quite useful
- 5. Of great use

2. How often have you used this particular PROFS function?

- 1. Not often
- 2. Now and then
- 3. Sometimes
- 4. Rather often
- 5. Very often

#### ***Section 4. Support from Management***

1. To what extent do you feel that management has encouraged you to spend the time necessary to learn PROFS and to integrate it into your work?

\_\_\_\_ 1. A great extent  
\_\_\_\_ 2. Quite a bit  
\_\_\_\_ 3. A moderate extent  
\_\_\_\_ 4. To some extent  
\_\_\_\_ 5. To little or no extent

2. To what extent do you feel that you are listened to when you have suggestions or when you believe there are problems with the PROFS implementation?

\_\_\_\_ 1. A great extent  
\_\_\_\_ 2. Quite a bit  
\_\_\_\_ 3. A moderate extent  
\_\_\_\_ 4. To some extent  
\_\_\_\_ 5. To little or no extent

## ***Section 5. Training and Documentation***

1. What is your opinion of the training you have received on PROFS?

- 1. Excellent
- 2. Good
- 3. Fair
- 4. Poor

2. What is your opinion of the training materials and other documentation you have been given for PROFS?

- 1. Excellent
- 2. Good
- 3. Fair
- 4. Poor

3. What is your opinion of the user assistance that has been made available to you as a PROFS user?

- 1. Excellent
- 2. Good
- 3. Fair
- 4. Poor

## ***Section 6. Computer Support***

1. As a PROFS user, what is your opinion of the response time on the computer system during normal working hours?
  1. Excellent, few delays
  2. Good, delays now and then
  3. Fair, sometimes there are delays
  4. Poor, there are delays rather often
  
2. As a PROFS user, what is your opinion, of the reliability of the system in terms of downtime, system crashes, or unscheduled system maintenance?
  1. Excellent, few problems
  2. Good, problems now and then
  3. Fair, sometimes there are problems
  4. Poor, there are problems rather often
  
3. As a PROFS user, do you have adequate storage allocated for your files?
  1. Very adequate
  2. Somewhat adequate, could use more
  3. Somewhat inadequate, must be careful to conserve space
  4. Very inadequate, often run out of space
  
4. How conveniently located is the work station or terminal that you use for PROFS?
  1. Very convenient
  2. Somewhat convenient
  3. Somewhat inconvenient
  4. Very inconvenient
  
5. How conveniently located is the printer that you use for PROFS?
  1. Very convenient
  2. Somewhat convenient
  3. Somewhat inconvenient
  4. Very inconvenient



**Section 7. Additional Information**

1. How long have you been using PROFS?

- 0. Not a PROFS user
- 1. Less than one month
- 2. At least one month but less than three
- 3. At last three months but less than six
- 4. Six months or more

2. What extra functions or features would you like to see on PROFS? Please list below:

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***Section 8. Other Comments and Suggestions***

Please use this space for any other comments and suggestions you have about the use of PROFS:

Thank you for taking the time to complete this survey.



