

# Report Sections: Methodology

Bowker COMM 390

# Definition

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- ▶ A methodology is usually a guideline system for solving a problem, with specific components such as phases, tasks, methods, techniques and tools. (Wikipedia)
- ▶ It shows your reader how you addressed the problem and provides them with an understanding of how you arrived at your conclusion.
- ▶ It also gives them confidence in your findings.



# Methodology

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- ▶ Methodology answers the questions: how do we determine (find out) what we need to know?
- ▶ Identifies the process we will use to come to a conclusion.
- ▶ Identifies the tools we need to answer the problem.
- ▶ Identifies specific components such as phases, tasks, methods, techniques and tools



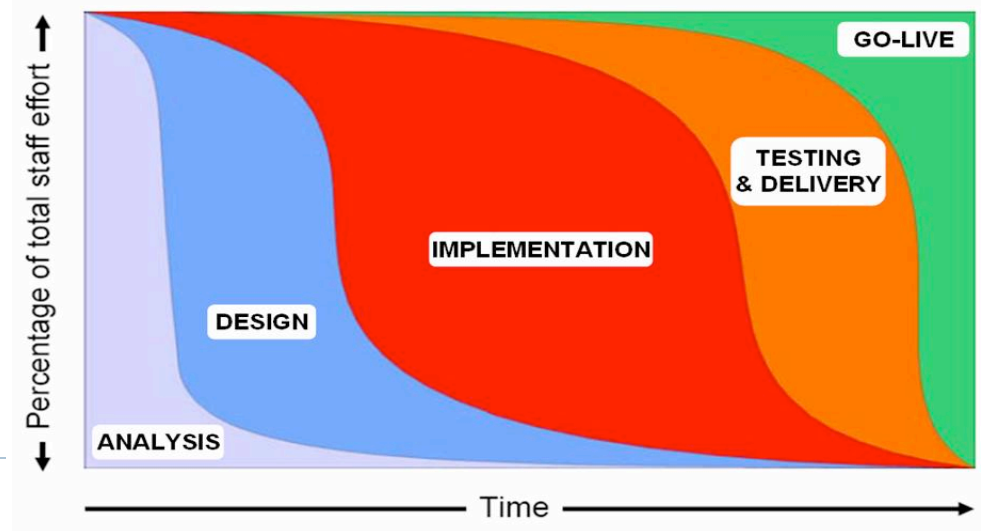
Comparison



Continuous Improvement

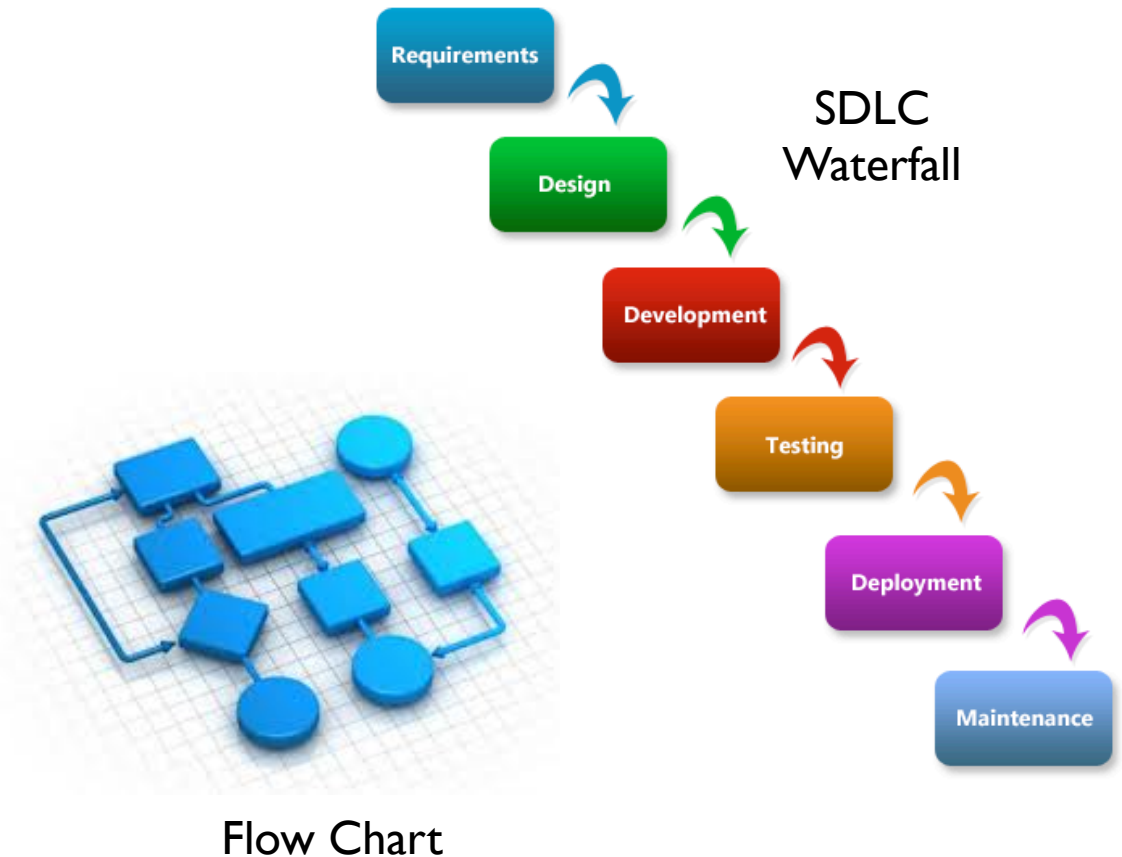
# Phases

- ▶ Methodologies often include a timeline that identifies a number of phases and deliverables within each phase. For example:
- ▶ A **Pilot Phase** will allow us to test the product in one region before implementing it across the country.
- ▶ The **Implementation Phase** will not be undertaken until we have 80% confidence the project will meet specified sales targets.



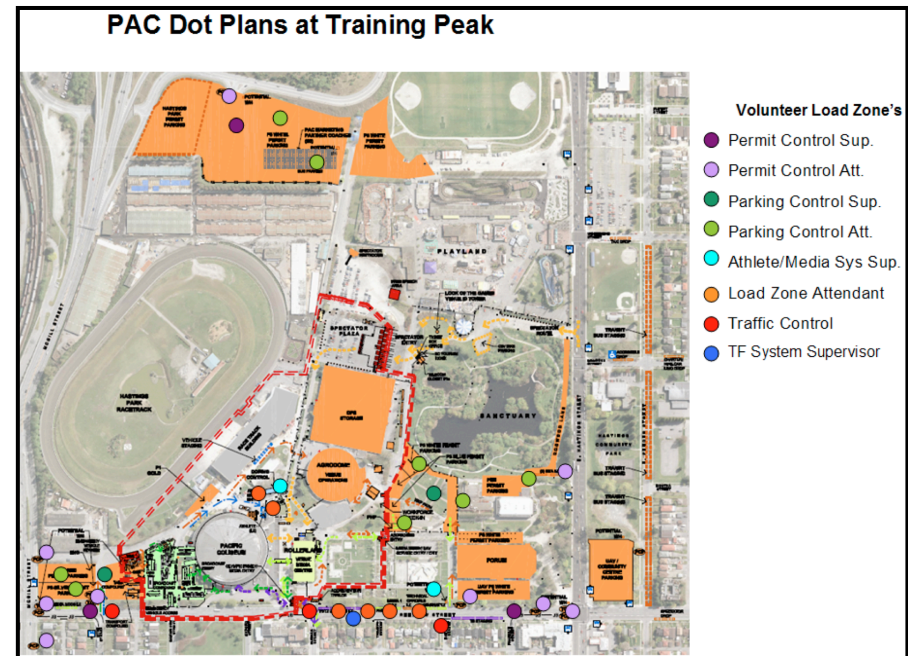
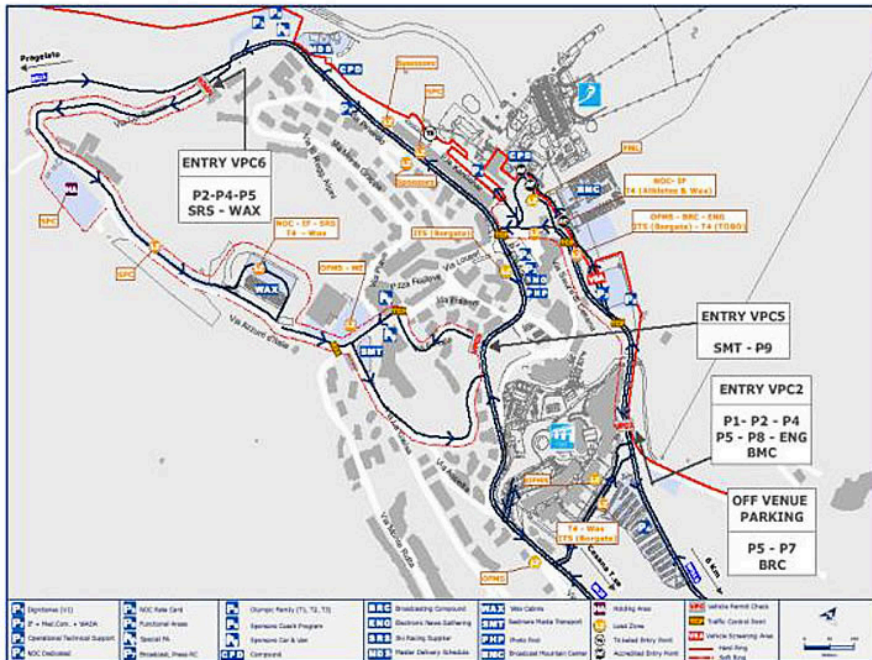
# Sample Methodologies

- ▶ Summary of research – primary & secondary
- ▶ Survey
- ▶ Interview
- ▶ Consultation
- ▶ Benchmarking
- ▶ Options evaluation
- ▶ Scenario Planning
- ▶ Mapping
- ▶ Modeling
- ▶ Simulations
- ▶ Case Studies
- ▶ Ratios



# Mapping

- ▶ Scenario Planning
- ▶ Dot Planning
- ▶ System Mapping
- ▶ Simulations



# Financial Ratios & Data Analysis

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## Quick Ratio

$$\text{Quick Ratio} = \frac{\text{Cash} + \text{Accounts Receivable}}{\text{Current Liabilities}}$$

$$= \frac{\text{Accounts Receivable} + \text{Cash} + \text{Equivalents} + \text{Cash}}{\text{Accruals} + \text{Accounts Payable} + \text{Notes Payable}}$$

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$$= \frac{\text{Sales}}{\text{Inventory}}$$

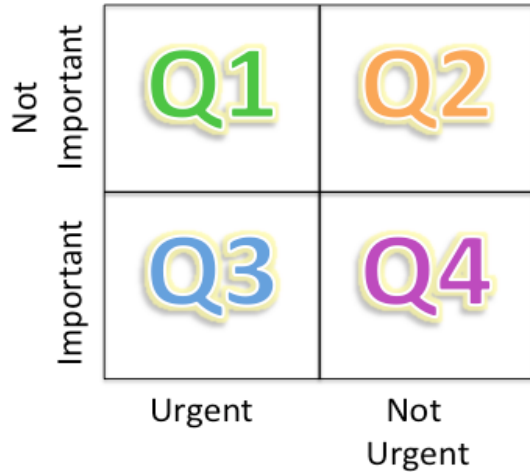
Inventory  
Turnover

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$$= \frac{\text{Cost of Goods Sold}}{\text{Average Inventory}}$$



# More Methodologies



Prioritizing



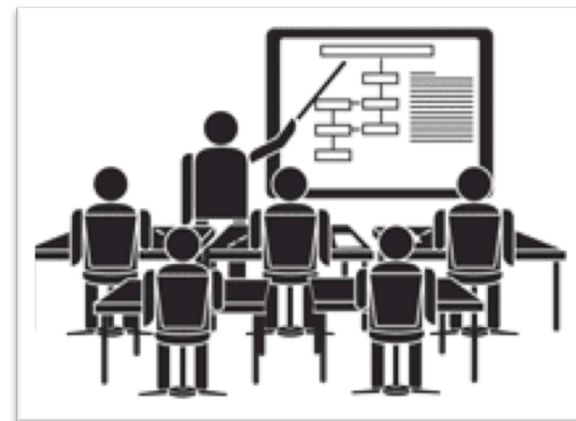
Interviews



Focus Groups



Surveys



Training



# Example Survey

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- ▶ ***“How Did We Do?”***
  - ▶ Were our staff friendly?
  - ▶ Did you get what you came for?
  - ▶ Did you get what you came for quickly?
  
- ▶ ***“Was the product what you expected?”***
  - ▶ Measures your communication
  
- ▶ ***“Was the product satisfactory?”***
  - ▶ Measures your quality.



# Interpreting the Data

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- ▶ Once you have collected data (e.g. from a survey or interview, using ratios or scenario planning), you must interpret it to determine what it tells you.
- ▶ Provide a thorough description of the data and follow it up with a detailed analysis of how and why it works.



# Interpreting the Data

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- ▶ A focus group survey for Yellow Cab identifies the following:
  - ▶ Overall service 2
  - ▶ Friendliness of drivers 4
  - ▶ Helpfulness of drivers 2
  - ▶ Timeliness of pickup 1
  - ▶ Timeliness of arrival 4
  - ▶ Safety 4



*Responses are rated 1-5 where 1 is very poor and 5 is excellent.*

Describe the methodology used and then provide an analysis of the data.



# Response

- ▶ A focus group of select individuals was created. The focus group was then asked to complete a questionnaire identifying how they felt about various aspects of service ranking their responses on a scale of 1-5.
- ▶ Overall the focus group found that drivers are friendly and drive well enough, however they were displeased with dispatch and wished drivers would be more helpful.



# Identifying Your Methodology

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A prospecting company is planning to look for gold and quartz in the Yukon north of Whitehorse.

What methodologies might they consider before they get started?

OR

A marketing agency is trying to get a very big and important account for Snickers and Mars.

What methodologies should they employ before making their pitch?

# Measuring Performance

- ▶ What measure will you use to identify success?
- ▶ Key Performance Indicators (KPI)
  - Quantitative
  - Quality Control
  - Financial
  - Sustainability
  - Personal Satisfaction
  - Customer Satisfaction
  - Team Strength

