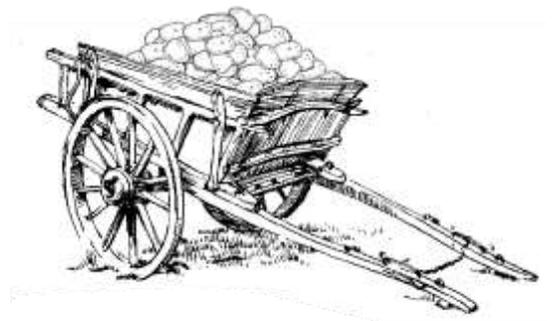


*Lamb Weston*

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Field Guide :: Checklists :: Operators/Distributors



PROJECT MULBERRY

## **DOCUMENT OVERVIEW**

The purpose of this document is to outline the goals, approach, and scripts for the field interviews and observational tours for both operators and distributors.

## **RESEARCH GOALS**

The goal of our research is to support Lamb Weston efforts to create forward thinking packaging for their frozen potato products by understanding and identifying opportunities that will improve the user experience for their customers. The restaurant and distributor research supports this overriding objective with the following specific goals:

- a. Understand different views of quality perception and packaging constraints
- b. Understand participants perceptions of the ideal package
- c. Understand first impressions and overcompensating behaviors

## APPROACH: OPERATORS

- **Introductions and background information (10 -15 min)**

During this brief discussion, the research team will introduce themselves and the goals of the session. Open ended questions will be used to understand participants' general food industry experience, their personal behaviors and attitudes toward food packaging. The research team in this section will probe to better understand participants expectations and their perceived "ideal food packaging experience" this measure will function as a baseline from which to measure subsequent real life experience with the frozen potato package. Used in tandem with open ended questions the researchers will probe to better understand emotional and experience drivers.
- **First impressions and overcompensating behaviors (1.5 hrs.)**

In this part of the session, a think-aloud protocol will be used to understand what participants are thinking, doing and feeling as they engage with the package. Participants will be required to actually open the package and will simulate their general cooking, storage and maintenance procedure while talking through package use. During this activity the research team expects to:

  - Understand participants' first impression of the box and value proposition of the product
  - Understand aspects of product use that delight, confuse and frustrate
  - Understand potential problems that will require probing in follow-up interviews
- **Observation of meal rush (1.5 hrs.)**

The research team will divide up and observe operations during a meal rush at unobtrusive points throughout the kitchen. This exercise will help capture tacit steps, pain points, deviations and frustrations that may occur when the operators are in full swing and working as a team.
- **Wrap-up (10 -15 min)**

The research team will ask more targeted questions, based on the observational period, about why certain things occurred during the meal rush and review both the topic and picture checklist to ensure that all desired points were covered. If there are any pivotal operators identified but not present for the initial interviews, this point in the process is the opportunity to capture their thoughts.

## A. Introductions and background information (10 - 15 min)

During this brief discussion, the research team will introduce themselves and the goals of the session. Open ended questions will be used to understand participants' general life circumstance, their personal behaviors and attitudes toward frozen food packaging.

**Script:** Thank you for meeting with us today. My name is \_\_\_\_\_ and this is \_\_\_\_\_ and we are from Radius, an agency that is working to understand the food packaging needs of people like you.

Today we want to spend some time to understand more about you and your impressions of food packaging currently on the market, specifically frozen potato packaging. Our discussion today should take about 3.5 hours. During this time we will be asking you questions and walking through some activities. It is important for you to know that there are no right or wrong answers to the questions we will be asking. We just ask that you be open and honest with us, we are impartial observers.

We appreciate your help and thank you for your participation.

With your permission, we would like record our interview with you, using video, audio, still images and notes. This information will be used for internal project purposes and recall only. When the study is complete the tapes will be archived with other data collected for this study for further analysis. At no time will the confidentiality of this research be violated by associating your name with any of the responses. They will not be publicized. – Is this permissible?

If so, would you please sign this consent form. Thank you so much.

Do you have any questions for us before we get started?

We'd like to interview the general manager first and then whoever is available that operates the fry line separately.

### Introductory questions for the manager

First we like to get some background about you, this should take about 10 minutes

#### General Information

- Please tell us your name and age
- In general: What are your day to day responsibilities?
- Probe to understand who is responsible for the following tasks (if not the person being interviewed)
  - Brings frozen food from truck/ receiving dock to freezer
  - Brings frozen food from freezer to operating line
  - Handles the frozen food at the operating line
  - Closes down operating line at the end of the day
  - Disposes of waste

#### Inventory

- Probe to identify who is in charge of inventory (specifically purchasing frozen french fries) If they are in charge:
  - How frequently are you ordering new food shipments? What is a typical shipment? What items do you typically order together?

- *How do you place your food orders? (Online, with broker, distributor etc.)*
- *How frequently are you receiving shipments? What time of day is the shipment delivered, where are they delivered and how long does the shipment stay there?*
- *How do you decide on brands of food?*
  - *When was the last time you changed brand and why?*
- *Have you run out of fries and had to get them in an emergency?*
  - *If YES, where do you go to purchase your fries in an emergency?*
- *Do you negotiate prices and if so with whom?*
- *Probe to understand to gauge their knowledge about operating costs:*
  - *What's the total cost of serving a single portion of fries from an operational standpoint?*
  - *Is it worth it to you from a cost perspective to reject a fry box?*

### **Kitchen Operations**

- *Probe on standard procedures and then question deviations:*
  - *What are common errors new employees make? Particularly in fry production?*
  - *How long does it take for them to be fully trained? When are they allowed to operate the fryer by themselves*
- *Is recycling a focus? (packaging, using oil for biodiesel etc.) Are there recycling guidelines in your area that you must follow?*
- *How do you manage the kitchen's cleanliness and waste?*

### **Feedback Customer/Employee**

- *Have you gotten any feedback from customers about fries? (How do you determine what happened and how do you get to the root cause?) What feedback do you get from you employees?*

### **Ideal State**

- *If applicable: What's your ideal packaging? Or What's been or show us your favorite package and why? (if they mention a consumer-facing packaging then allow them to answer but follow up with commercial packaging)*
- *What changes would you make to the kitchen/ back of the house?*

*Thank you so much for your time. We would now like to speak with whoever is available that operates the fry line alone.*

### *Introductory questions for the operator*

*First we like to get some background about you this should take about 10 minutes and then for the follow up questions, please know that there are no right or wrong answers and your answers will not be shared with anybody else.*

### **General Information**

- *Please tell us your name and age*
- *In general: What are your day to day responsibilities?*
- *How long have you worked at this particular restaurant? In the food industry generally?*
  - *Do you train others?*

### **Kitchen Operations**

- *Probe to understand who is responsible for the following tasks (if not the person being interviewed)*
  - *Brings frozen food from truck/ receiving dock to freezer*
  - *Brings frozen food from freezer to operating line*
  - *Handles the frozen food at the operating line*
  - *Closes down operating line at the end of the day*
  - *Disposes of waste*
- *What do you currently do to make your job easier? What keeps you from completing your tasks?*

### **B. First impressions and overcompensating behaviors (1.5 hrs.)**

In this part of the session, a think-aloud protocol will be used to understand what participants are thinking, doing and feeling as they engage with the product. Participants will be required to actually open the package and will simulate their general cooking, storage and maintenance procedure while talking through package use. During this activity the research team expects to:

- Understand participants first impression of the box and value proposition of the product (both inner and outer packaging)
- Understand aspects of product use that delight, confuse and frustrate
- Understand potential problems that will require probing in follow-up interviews

**Logistics:** Use task analysis to understand where they are at in the process. Do not help them. Do not tell them what to do or how to do it. If they are not speaking out loud ask them to tell you what they are doing and thinking.

**Script (for operator, cross reference with manager's answers):** *For the remainder of our time together, we want to understand your experiences with frozen food packaging. Would you please walk us through what happens to a case of frozen food from the moment it comes off the truck and to the moment its given to a customer.*

*Please also demonstrate what you would normally do during peak service time and walk us through your approach. In order for us to understand your reactions we would like you to speak aloud all your thoughts. Walk us through your process, your frustrations, and things that you like. For example, I would first open the box. I really like that package does this... I kinda think it is weird that XYZ...etc.*

### **Shipping + Receiving**

- *First, please show us to the receiving area for new frozen food deliveries.*
  - What time of day is the shipment delivered?
    - Probe if they have been present for a delivery; What does a shipment look like on the truck? Do you receive a pallet or a few cases?
      - Who takes the shipment off the truck and does anyone else handle it?
      - How long does the shipment stay there?
      - Who makes the decision to reject a package of frozen food such as french fries, mozzarella sticks or onion rings? What is the protocol and what would cause a rejection?
      - How do you know if everything in the shipment is correct?
  - Tell me about your biggest disastrous experience in this space/ part of the process?
    - What have you seen in other delivered products that impressed you in terms of handling or opening?

### **Long Term Storage**

- *Would you mind walking us through the freezer?*
  - *Whose responsible for the cases once they are in the back house? Who puts the food away? Do you know how long it takes to put the food away?*
  - *Probe if they have experience with opening an case; How do you open the box? Tool? What box do you pick and why? What's the condition of the box?*
    - *What information would be helpful on the box? What is your favorite and least favorite box to deal with? What's a good size box?(Graphics, Instructions etc.)*
    - *Are you opening it in the freezer or out of the freezer? Do you use boxes or bags in the Line or freezer?*
  - *Probe if they have experience with the freezer; How is the freezer organized? What is the stock rotation policy? What temperature is the freezer set at?*
    - *How do you identify one food item from another? How can you tell how old a food item might be? Do you experience any product loss (shrink) in here?*
    - *What happens to the box when it's a third empty, half full and empty? Do you combine boxes/bags? If so how do you know what's in the box/bag?*
    - *How long do open bags last in the freezer? How long should your frozen food, such as fries last? Do you portion out your bags? Is sealing the bag an issue?*
  - *What's working and not working in the freezer? Tell me about your biggest disastrous experience in this space/ part of the process?*

### Use of Frozen Food Packaging

- *What matters most to you regarding your frozen food packaging*
  - *Probe to understand what would cause a rejection of a package? What does that deficiency say about the frozen food product? What is the scale of acceptability?*
- *Probe to understand what incents them to toss out frozen product, what causes those losses, what do they do to try and avoid those problems.*
- *Which of these frozen food brands would you describe as “inventive” or “innovative”? What about them makes you say that? (Probe about packaging specifically)*

### Fryer Operation

- *Train me (show me how) to run the fryer*
  - *Probe process that they use; Can you give me an overview of any challenges when it comes to frying...e.g. overcooked the fries, trouble keeping track of supply etc.*
- *Probe to understand frying regime – steps, tools, pain points, frustrations – Look specifically for any aids (dispensers, scoops, mini fridges etc.)*
  - *How do you prep for a rush? How long can frozen fries sit out? Do fries go back in the freezer? How do you decide which bag to open? Quantity, measuring, dispensing...*
  - *How much of the fries goes into the fryer basket and how much goes into an individual portion? Pouring experience, spillage – What’s left in the bag? What do you do with it?*

### Post Fryer

- *Observe; What are the fries sitting on and next to? Does it sit on anything before or after you fry it? How long do they sit under a heat lamp? How do you know that they’re bad?*
  - *Resealing & Storage; What do you do with an unsealed bag at the end of the day? What is your opening up and close down procedure for fries?*
  - *How many fries do you throw away per shift? What do you do with fry bits in the bag and those under the lamp? How often do you change your oil? Do you share oil?*
  - *What happens to empty boxes/bags?*

### C. Observation of meal rush (1.5 hrs.)

The research team will divide up and observe operations during a meal rush at unobtrusive points throughout the kitchen. This exercise will help capture tacit steps, pain points, deviations and frustrations that may occur when the operators are in full swing and working as a team.

**Logistics:** Listen and look for deviations in the process, and any challenges that appear. Do not stand in the way. Do not try to interrupt their workflow to ask a question. Do not help them. Do not tell them what to do or how to do it.

**Script:** *Thank you so much for answering all of those questions! We hope to see that whole process in action now, if you don’t mind directing us to spots in the kitchen that would be unobtrusive to your operation. Please let everyone in*

*the kitchen know that they should ignore our presence if possible and carry on as they normally would on a typical work day.*

*Our goal is simply to quietly observe and document the operation with photos and recorders. The data collected will not be seen be publicized and we will obscure the identification of any individual employee. Feel free to direct us at anytime so that we are not in the way.*

#### **D. Wrap-up (10 -15 min)**

The research team will ask more targeted questions based on why certain things occurred during the meal rush and review both the topic and picture checklist to ensure that all desired points were covered. If there are any pivotal operators identified but not present for the initial interviews, this point in the process is the opportunity to capture their thoughts.

**Script:** *Thank you so much for your participation. If you don't mind, we would like to just make sure we have covered all necessary topics and captured all the photos necessary (check topic and picture checklist). This information will help us direct our work and if you should think of anything else that might help us, please don't hesitate to contact us. (pass business card). Last but not least, do you mind if we get your contact information so that when we are done evaluating the information, we can get your feedback on potential concepts.*

## APPROACH: DISTRIBUTORS

- **Introductions and initial interviews (1.5 hr.)**

The research team will introduce themselves and the goals of the session. The session will begin with the warehouse supervisor and then the purchaser who deals with managing inventory. Each key interview will be held separately prior to the tour to understand the distribution center's general procedure along with any particular pain points, frustrations and ideal expectations. These interviews will act as a primer for the final interview with whoever deals directly with truck loading and the tour of the facility. The expectations during this activity are that the team will:

- Guide participants into detailing their experience with various packaging specifications
- Understand what packaging aspects work well and what aspects do not work well
- Identify problems that will require more investigation

- **Observational distribution center tour (1.5 hr.)**

Either the warehouse supervisor or a warehouse operator will guide the research team through the daily operations at the distribution center. This activity will generate more targeted questioning with the aim of better understanding the challenges that operators face.

- **Wrap-up (15 - 30 min)**

The research team will review both the topic and picture checklist to ensure that all desired points were covered. If there are any pivotal operators identified but not present for the initial interviews, this point in the process is the opportunity to capture their thoughts. The team will also use this as an opportunity to ask questions about what was seen during the observational tour.

### A. Introductions and initial interviews (1.5 hr.)

The research team will introduce themselves and the goals of the session. The session will begin with the warehouse supervisor and then the purchaser who deals with managing inventory. Each key interview will be held separately prior to the tour to understand the distribution center's general procedure along with any particular pain points, frustrations and ideal expectations. These interviews will act as a primer for the final interview with whoever deals directly with truck loading and the tour of the facility. The expectations during this activity are that the team will:

- Guide participants into detailing their experience with various packaging specifications
- Understand what packaging aspects work well and what aspects do not work well
- Identify problems that will require more investigation

**Script:** Thank you for meeting with us today. My name is \_\_\_\_\_ and this is \_\_\_\_\_ and we are from Radius, an agency that is working to understand the food packaging needs of people like you.

Today we want to spend some time to understand more about you and your impressions of frozen food packaging currently on the market. Our discussion today should take a few hours. During this time we will be asking you questions and walking through some activities. It is important for you to know that there are no right or wrong answers to the questions we will be asking. We just ask that you be open and honest with us, we are impartial observers.

We appreciate your help and thank you for your participation.

With your permission, we would like record our interview with you, using video, audio, still images and notes. This information will be used for internal project purposes and recall only. When the study is complete the tapes will be archived with other data collected for this study for further analysis. At no time will the confidentiality of this research be violated by associating your name with any of the responses. They will not be publicized. – Is this permissible?

If so, would you please sign this consent form. Thank you so much.

Do you have any questions for us before we get started?

We'd like to interview the warehouse supervisor first and then whoever deals with purchasing and inventory.

*Interview questions for the warehouse supervisor*

First we like to get some background about you this should take about 10 minutes

#### General Information

- Please tell us your name and title
- In general: What are your day to day responsibilities?

#### Specifications

- Tell us about a time when the order didn't match what was shipped? What can go wrong with unloading from a truck or railcar?
- What sorts of technologies (passive [ex. RFID], optical, active [RFID powered by a reader]) are you employing at this facility? What kind of data automation are you using? Are you using GS1? Or RFID?

- *What is your pallet configuration? Do you have specs for that? What is the procedure when the pallet doesn't match the specs.?*
- *What are the best/worst pallets to handle and why? What product here do you have the most trouble with and which one the least and why?*
- *What do you read on the box? Does the box tell you enough? Has the distributor ever had a reason to open the box?*
- *What are the best/ worst boxes to handle and why? What product here do you have the most trouble with and which one the least and why?*

### **Value Proposition**

- *What differentiates you from other distribution centers?*
- *Do you reject boxes? Why? What happens with reject boxes? What do you do with customer rejected boxes?*
- *How do you track cost? What is the cost breakdown to re-handle a case or box?*

### **Ideal State**

- *What would you change about day to day operations? What do you currently do to make your job easier? What keeps you from completing your tasks?*
- *What brands would you describe as having “inventive” or “innovative” packaging? What about them makes you say that? (Probe for ideal packaging/ new packaging/ trends they've seen)*

*Interview questions for the managing operator (If not a computer)*

*First we like to get some background about you this should take about 10 minutes*

### **General Information**

- *Please tell us your name and title*
- *In general: What are your day to day responsibilities?*
  - *Do you ever send out the wrong product because of lacking/inaccurate packaging information?*
- *Tell us how ordering/buying works for a large customer and a small customer.*
- *Show us how you track shipments, delivery times etc. (Do they rotate the stock?)*

### **Ideal State**

- *What would you change about day to day operations? What do you currently do to make your job easier? What keeps you from completing your tasks?*
- *What are the best/worst pallets to handle and why? What product here do you have the most trouble with and which one the least and why?*
- *What are the best/ worst boxes to handle and why? What product here do you have the most trouble with and which one the least and why?*
- *What brands would you describe as having “inventive” or “innovative” packaging? What about them makes you say that? (Probe for ideal packaging/ new packaging/ trends they’ve seen)*

### *Interview questions for the general laborer*

*First we like to get some background about you this should take about 10 minutes*

#### **General Information**

- *Please tell us your name and title*
- *In general: What are your day to day responsibilities?*

#### **Loading/ Unloading**

- *How long does it take you to unload the truck? What takes up the most time when loading and unloading? Where does the truck park (in the air conditioning?)*

#### **Pallets**

- *Are you responsible for sorting the pallets into specific receiving/shipping areas, and if so how do you know where to place specific pallets?*
- *How do you handle mixed pallets? How do you know that you have the right boxes? How do you know what’s in the pallet?*
- *How do you handle doors when unloading?*
- *What information do you look for when loading and unloading the pallets? What are some of the most common problems you see with the pallets when they arrive?*
- *What are the best/worst pallets to handle and why? What product here do you have the most trouble with and which one the least and why?*

#### **Boxes/ Product:**

- *Before looking at the box, What information is on the box? Then after looking at the box, what information is important to you?*
- *When do you see product becoming damaged the most?*
- *Do you ever have to handle individual boxes? If so, what are the biggest difficulties you face?*

- *Do you ever have to stop the fork truck to get out and adjust/fix something?*
- *What are the best/ worst boxes to handle and why? What product here do you have the most trouble with and which one the least and why*
- *Where are pallets and boxes stored before being shipped out? How long is product stored before being shipped out?*

### **Ideal State**

- *What is the least and most enjoyable part of your job? What do you currently do to make your job easier? What keeps you from completing your tasks?*
- *What brands would you describe as having “inventive” or “innovative” packaging? What about them makes you say that? (Probe for ideal packaging/ new packaging/ trends they’ve seen)*

### **B. Observational distribution center tour (1.5 hr.)**

Either the warehouse supervisor or a warehouse operator will guide the research team through the daily operations at the distribution center. This activity will generate more targeted questioning with the aim of better understanding the challenges that operators face.

**Logistics:** Listen and look for deviations in the process, and any challenges that appear. Do not stand in the way. Do not try to interrupt their workflow to ask a question. Do not help them. Do not tell them what to do or how to do it.

**Script:** *Thank you so much for answering all of those questions! We hope to see that whole process in action now, if you don’t mind giving us a tour of the facility. We would like to understand the whole process from the moment the pallets come off the truck to the moment they get shipped off again.*

*With your permission, we would like to document the operation with photos and recorders. The data collected will not be seen be publicized and we will obscure the identification of any individual employee. You can also review the photos before we leave. Feel free to direct us at anytime so that we are not in the way.*

### **C. Wrap-up (15 - 30 min)**

The research team will review both the topic and picture checklist to ensure that all desired points were covered. If there are any pivotal operators identified but not present for the initial interviews, this point in the process is the opportunity to capture their thoughts. The team will also use this as an opportunity to ask questions about what was seen during the observational tour.

**Script:** *Thank you so much for your participation. If you don’t mind, we would like to just make sure we have covered all necessary topics and captured all the photos necessary (check topic and picture checklist). This information will help us direct our work and if you should think of anything else that might help us, please don’t hesitate to contact us. (pass business card). Last but not least, do you mind if we get your contact information so that when we are done evaluating the information, we can get your feedback on potential concepts.*



## Topic Checklist

### Managers

- General Information
- Inventory
- Kitchen Operations
- Feedback Customers/ Employees
- Ideal State

### Operators

- General Information
- Kitchen Operations
- Process
  - Shipping + Receiving
  - Long term Storage
  - Use of Packaging
  - Fryer Operation
  - Post Fryer

### Distributor Supervisor

- General Information
- Specifications
- Value Proposition
- Ideal State

### Managing Operator

- General Information
- Ideal State

### General Laborer

- General Information
- Loading/Unloading
- Pallets
- Boxes/ Product
- Ideal State

## Picture Checklist

### Operators

- Establishing Shot - Restaurant Front
- Employee photos if given permission
- Receiving Area Flow
  - Truck/Dock
  - Route to Freezer
  - Tools used in this area
- Freezer
  - Inventory Checklist
  - Establishing Shot
  - Organizational Shots
    - Bag organization within cases
    - Reseals or smaller portioned bags
    - Barcode of any damaged boxes
  - Tools used in this area
  - Disposal area of cases
- Staging Freezer – If present
  - Other food products
  - Tools
- Fryer Area
  - Staging area for fries
  - Fryer basket
  - Dispensers or other measuring items
- Disposal Flow
  - Garbage
  - Recycling

### Distributors

- Establishing Shot – Front of Distribution Center
- Truck Organization
- Receiving Dock
- Freezer – if separate from Warehouse
- Re-Palletized Cases
  - Any tape or tools
- Damaged Cases
  - Barcode of any damaged boxes