Suzy Q’s is a retail business located in the southeastern United States. It offers hand-knitted scarves; handmade hair accessories; handcrafted beaded jewelry such as necklaces, bracelets, and earrings; small handmade children’s toys; and stock and custom-printed T-shirts. It began operations in early 2014. The owners established an online store and developed plans to sell items at local craft fairs and farmers’ markets in the southeastern United States. During its initial launch, the business generated limited orders for its products. In the beginning there was a limited amount of advertising using social media, which consisted of establishing a Facebook page, posting notifications on the business’s Facebook page, and posting notifications about the business to the owners’ personal contacts on Facebook. Despite establishing a web presence and utilizing social media in its first year of operations, Suzy Q’s did not generate a significant number of orders and received very little revenue. The owners of Suzy Q’s, our client, established a goal to generate at least $700 per month in revenue for the calendar year 2015.

Our analysis of the business revealed that the managers and employees had the skills needed to perform the work, but the lack of orders presented an obstacle to achieving their business goals. After completing a performance analysis, we recommended that Suzy Q’s establish a single online presence, implement a marketing effort, establish a local presence, create a dedicated studio space, and create a formal business plan. It was our belief that Suzy Q’s had the potential to reach its goals set for 2015 and beyond if these solutions were implemented.
posting notifications on the business’s Facebook page, and posting notifications about the business to the owners’ personal contacts on Facebook.

During initial operations, the business’s performance had been disappointing for the owners. Despite establishing a web presence and utilizing social media, Suzy Q’s had not generated a significant number of orders and had limited revenue. The goal of the owners, our clients, was for Suzy Q’s to generate a minimum of $700 per month for the calendar year 2015. The managers and employees had the skills needed to perform the work, but the lack of orders presented an obstacle to achieving their business goal.

Organizational Analysis

As noted, Suzy Q’s is a small boutique-style online store that provides custom T-shirt printing and handmade jewelry and accessories for retail sale. It is the company’s mission to provide its customers with personalized service and high-quality handcrafted products from a family-owned and -operated business. The business owners are committed to providing personalized service and bringing a local shop feel to their online outlet.

The two business owners are also the managers and there is one additional employee. The managers have divided responsibilities based on their interests and strengths. The business manager has a background in
inventory control, accounting, and customer service, and she handles all of the business operations aspects of the business as well as creating some of the handcrafted items for sale. The other owner is the marketing manager. He has a background in marketing, and he handles marketing efforts as well as creating the stock T-shirt designs and operating the heat press. Both managers maintained employment other than Suzy Q’s, and this outside employment provided the leads for the sales the business achieved initially. The business manager had extensive contacts in the community; she was an active member of a local parent organization and a substitute teacher at a local public school. The school had several groups that regularly used T-shirts as fundraising opportunities, including the parent organization and the class of eighth-grade students. The marketing manager had extensive contact with construction contractors, who also regularly ordered custom-printed shirts for their employees. It was the managers’ intent that they can secure regular T-shirt orders from these sources. They had early success in securing an order for 25 shirts from one local contractor.

Environmental Analysis

The business had established several web outlets, rather than one unified presence. The business maintained a web presence on both Facebook and Etsy. There were several issues with the websites. First, the original websites did not have a professional appearance. All of the sites had a scan of the company’s business card as a banner with photographs of the items for sale in a grid below it. Second, all of the sites were located at web addresses that were not easily recognized or remembered. To further complicate the issue, the Square Up Market site was not consistently found by typing in the web address, and sometimes an error message was displayed. Third, the available inventory was not consistent between the various sites. The Etsy site listed three items for sale, while the Google site listed dozens of items. The Google site listed different types of items organized in tabs within the site, however, some of the pages had no sale items on them at all, while some pages featured many items. There also appeared to be some issues with functionality on the Google site. There was a comment section at the end of each page that indicated that viewers could leave comments, but it did not function correctly. On all of the sites, the images promoting the items lacked professionalism. The pictures of the items were occasionally off-center or at an angle that allowed the customer to see beyond the desired background for the item. The photographs were not correctly oriented on the web pages, so that vertical images were displayed horizontally. Examples of images from the websites are displayed in Figure 2.

In our environmental analysis, we noted that orders could be placed through the Google site, which linked to the Square Up Market shopping cart function, directly through the Square Up Market site, or through direct contact with either of the managers. Because the business maintained multiple websites, the business manager had to check several separate accounts to determine if orders were being placed. None of the sites had generated enough traffic or orders for this to present a significant problem at that time, but this arrangement would be problematic if orders increased.

We found that the production facility for the business was being housed in a dedicated room in the clients’ residence. The space measured 10 feet by 15 feet and seemed adequate for the clients’ needs at that time. The facility housed a desktop computer and the heat press for printing T-shirts. The client had also procured transfer paper, a wide-format printer, and a software program for the T-shirt component of the business. The business manager had obtained materials for the handmade items, and the employees were continuously producing scarves, hair accessories, and jewelry. At that time, the clients estimated they were spending about two hours per week per employee on production. This was predominantly accomplished in the evenings and on weekends, due to the employees’ outside employment. Due to the lack of T-shirt orders, it was not known how much time would need to be spent creating the custom T-shirts on a weekly basis.

Gap Analysis

Current Performance. As noted, the web presence for the business was being housed in several locations, including websites on both Google and Square Up, and included the host site name preceding the name of the business. At the time of our analysis, the traffic on the sites was minimal to none, and no traffic data were available for analysis. The company had received very few orders, and these were obtained through personal contact with the managers. Given the low number of orders, the company had not established workflow policies or
At the time of the analysis, the business was falling significantly short of the goal. There was a 91.4% gap between the desired monthly sales and the actual monthly sales of the company.

**Cause Analysis**

Our team used extant data analysis, questionnaires, and personal interviews to determine the causes of Suzy Q’s performance problems. Our analysis revealed that these causes were predominantly environmental and were related to issues with organizational tools and development. See Table 1 for details on our cause analysis.

**Lack of a Central Online Presence:** One major environmental factor was the unpolished web design. In our analysis of the original websites established by the company, we found that the company had taken a scattershot approach to its web presence, using several sites to establish its web presence. This lack of focus resulted in low traffic and low sales on all of the several sites.

**Lack of Professionally Designed Website and Low-Quality Images:** The design of the sites was not

**Desired Performance and Gap.** Suzy Q’s owners set a desired goal to generate $700 per month in revenue over the coming year. At the time of the analysis, the business was falling significantly short of the goal. There was a 91.4% gap between the desired monthly sales and the actual monthly sales of the company.
professional in appearance and presentation of items for sale was confusing. The sites were inconsistent in their presentation of the items for sale and did not present a professional storefront for the business. This issue was exacerbated by the fact that the items themselves were being photographed in a way that did not present them to their best advantage. The images of the items had inconsistent backgrounds, including the showing of furniture surfaces in the background, and some images were not oriented correctly, including horizontal images being displayed vertically. These images made the website look less than professional. An example of this is shown in the screenshot in Figure 2.

**Lack of a Marketing Plan:** The organizational development factors we found were the lack of a marketing plan, lack of a local presence, and lack of a formal business plan. The organization did not have a marketing plan, and we asserted that this was an area that the company should focus on to become successful.

**Establish a Single Online Presence:** The top priority for initial improvement would be a single outlet for the company’s web presence. The situation of having an Etsy storefront, a Google site, and a Squared Up Market site is functional only because the company has received so few orders.

**Non–professionally designed website**

Websites have an unprofessional appearance with unprofessional images. A website with tutorials and website builder software would be ideal considering the client’s minimal level of knowledge on how to create a website from scratch.

**Little to no marketing plan**

Given the minimal number of visitors to the established websites, Internet marketing would be the second priority for Suzy Q’s. There are several social networking–related options for online marketing, some of which are free.

**No presence at local markets or boutiques**

This would offer the client the opportunity to reach customers who are already likely to be seeking handcrafted items at these venues. Some of these customers would be seasonal, as the business is located in the coastal southeastern United States, an area that experiences significant seasonal fluctuations in tourism.

**Lack of a formal business plan**

There was no formal business plan and no stated vision or goals, other than the stated desire to generate a set amount of income.

**Lack of a Local Presence:** Suzy Q’s had not yet implemented its plans to establish a local presence at craft fairs and farmers’ markets. Not doing so as planned had contributed in part to the business’s initial lackluster performance.

**Lack of a Business Plan:** Our extant data analysis also revealed that the company had no formal business plan and no stated vision or goals, other than the stated desire to generate a set amount of income. We assisted the client in creating a mission statement, but the company’s vision statement and goals needed to be further generated by the owners. The lack of a formal business plan would make it difficult for the business to grow and develop, as there is no guidance in place for future efforts. The lack of a stated vision and goals would similarly hinder the company from growing in a way that was consistent with the owners’ personal vision for the company. Having no stated vision and goals was likely to result in organizational problems in the future, because it was highly likely that the owners have unspoken and unrecognized visions and goals for the company that may be incompatible or not fully understood by the partners.

### Intervention Selection

Noting the causes identified and the information collected during the analysis phase of the project, it was ascertained that organization design and development interventions were needed. The following interventions were recommended for Suzy Q’s and would help align the aspects of the organization with the business plan.

**Establish a Single Online Presence:** The first recommended intervention was for Suzy Q’s to combine the company’s Etsy, Google, and Square Up sites to increase traffic and prevent the possibility of losing orders. The most user friendly e-commerce tool at the time was available through FatCow. FatCow offered web hosting, user-friendly site-building tools, marketing tools, an online store and selling tools, and support. A priority for Suzy Q’s was to create an appealing website with its own domain name. The pictures of items needed to be posted on the site in a way that attracted interest and looked professional. All purchases would be made through this new site using the e-commerce tools provided by FatCow. Utilizing one website would provide the owners with the added benefit of being able to track sales and inventory, and fulfill orders correctly in a timely manner. The cost of this intervention when the intervention was suggested was $49 per year, with domains included in that price. Because the company was already paying a similar amount to maintain websites with other hosts, we judged this to be a highly feasible solution for Suzy...
Q’s that provides significant advantages over current practices.

Implement a Marketing Effort: The second suggested intervention involved Suzy Q’s implementing a marketing plan to raise awareness of the business and to increase sales. FatCow offered both search engine optimization and e-mail marketing tools. There were several additional options identified for online marketing that targeted social networking sites, some of which were free. Suzy Q’s could use its existing Facebook page to take advantage of two Facebook marketing options, boosting posts and Facebook Ads. At the time of analysis, Facebook allowed businesses to boost posts for a minimal fee and set a maximum amount to be spent for boosting. Facebook used that maximum amount to determine which posts to boost, or the business could customize boosting to apply to certain posts. Facebook Ads were also an option for building clients and future sales. Facebook allowed businesses to set a maximum amount to spend on advertising, then the business created an ad and Facebook displayed the ad, collected user data, and reported the data back to the business. Small businesses like Suzy Q’s benefitted most by advertising free giveaways or special deals. This would increase fans of Suzy Q’s Facebook page, which could lead to increased sales. Another social networking site that offered a free marketing option was Pinterest. On Pinterest, businesses could create accounts and set up boards or pages that included the different items for sale. The boards could be shared through Twitter or Facebook. Pinterest users could share the boards with other users to increase the traffic for the pages. In addition, Suzy Q’s could use their existing Facebook site and Pinterest to share new products and promote sales. The company needed to direct all inquiries to their main website, where clients could make purchases. Suzy Q’s could also use Facebook to inform its clients when they would be present at the local farmers’ market and other events where items could be purchased and ordered. The cost of this intervention would be dependent on the options selected, although as stated above, some of the options bore no cost at all.

Establish a Local Presence: The third intervention was to follow through on the owners’ initial plans to establish a local presence at local farmers’ markets, craft fairs, and boutiques. The local farmers’ market was identified as the best place to start. The booths were priced very reasonably at $20 to $25 per market day. The market was open every Saturday from May 17 to October 4, 2014, and vendors could choose which Saturdays they wished to attend. The market attracted a large number of local artisans and craftspeople, and therefore attracted a large number of seasonal customers interested in these types of goods. We recommended that if the first season at the farmers’ market was a success, the owners could consider also purchasing space at additional nearby farmers’ markets. The craft fairs and boutiques would require significantly more research and time to pursue, and, therefore, the owners may have elected to forgo these strategies. The initial cost of the intervention would be $420, if the owners decided to attend all 21 Saturday markets for 2014. It was more likely that this intervention would cost less, if the owners chose to not attend every market over the summers.

Create a Dedicated Studio Space for Photographing Sales Items: The fourth intervention we recommended was to create a dedicated photography studio for photographing the items to be offered for sale. This is a strategy commonly employed by high-volume sellers on marketing sites such as eBay and Etsy. By creating a small area in the production area of the business, with a simple white presentation board such as a $4 tri-fold, a white sheet, and a lamp with a bright bulb, Suzy Q’s could significantly increase the visual appeal of its website and the professional appearance of its offerings for sale. We estimated that this intervention would cost approximately $25 in materials and would provide a high return for this small expense.

Create a Formal Business Plan That Outlines the Mission, Vision, and Goals for the Business: Finally, Suzy Q’s needed to create a business plan to help the owners reach their goals. The process of creating a business plan would require the owners to look at all aspects of the business, including the internal and external environments. This process would also help to identify other indicators related to performance. Once the business plan was completed, any other identified interventions would need to be implemented to help the owners reach their goals. The cost of implementing this intervention would be minimal, as there are many resources available at the public library for writing business plans.

Feasibility Analysis
A feasibility analysis was conducted, and each intervention was rated on a scale of 0 to 10 based on its advantages and risks. The feasibility of each of these interventions is indicated in the feasibility decision matrix displayed in Table 2.

IMPLICATIONS AND RECOMMENDATIONS
Through our analysis, we discovered that Suzy Q’s was working with several online outlets and was not using a professionally designed website. In addition to this, Suzy Q’s websites contained products on one website that
did not exist on the other websites. When attempting to purchase an item, the user would click on the item of choice, which would redirect them to a different site to complete the purchase. A buyer looking for a certain item might miss it due to the items not being in one place. Not having one central online presence led to confusion and frustration for customers. As business increases, Suzy Q’s might also have a hard time keeping track of inventory, causing them to lose track of a buyer’s purchases. A non-professional website may cause buyers to look elsewhere for similar items due to a belief that the quality of the business’s website is a direct reflection of the quality of the products.

We also discovered that Suzy Q’s had done very little marketing. Without awareness of the business, sales would be minimal because customers would not be aware that Suzy Q’s was selling a product they might be interested in purchasing or that the product existed at all. Suzy Q’s also lacked a presence offline at local markets and boutiques. This represented a missed opportunity to earn income locally, build a presence within the community, and raise local awareness of the business.

We also identified the lack of a formal business plan. Without a formal business plan, Suzy Q’s did not have set goals to help them reach their ultimate objective. This could cause them to go off track and be unorganized. Our recommendations included for Suzy Q’s to operate their website with a web host that could provide them with one central website that would allow them to make it look professional and use a shopping cart feature for selling products and keeping track of sales history. According to our research, FatCow was the most cost-effective and user-friendly choice to get this done. We recommended that Suzy Q’s also use free options and social networking to market themselves to potential customers. Using Facebook to create ads for their business and social networking with customers and other businesses online represented a low-to-no-cost solution for their marketing needs. We agreed with the owners that Suzy Q’s should take advantage of the local farmers’ market by having a booth to sell products there and build a local presence. They could also approach local boutiques in town, to reach a wider local audience. Finally, Suzy Q’s owners needed to create a business plan that outlines the mission, vision, and goals for the business. In our professional judgment, by implementing these

---

**TABLE 2 FEASIBILITY DECISION MATRIX**

<table>
<thead>
<tr>
<th>CONSIDERATION (ESTIMATED OR PROJECTED)</th>
<th>ADVANTAGE RATING (0 = NO ADVANTAGE, 10 = HIGH ADVANTAGE)</th>
<th>RISK RATING (0 = NO RISK, 10 = HIGH RISK)</th>
<th>ADVANTAGES</th>
<th>RISKS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online presence</td>
<td>10</td>
<td>2</td>
<td>• Unified web presence</td>
<td>Given that company is already spending money to maintain several websites, risk is very low for establishing single point of presence.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Single point of sale</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Eliminates danger of lost orders</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Streamlined business processes</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• E-commerce simplified</td>
<td></td>
</tr>
<tr>
<td>Marketing</td>
<td>10</td>
<td>6</td>
<td>Increased online traffic and sales</td>
<td>Will have to spend money to advertise, and may not see immediate returns on investment</td>
</tr>
<tr>
<td>Establishing local presence</td>
<td>7</td>
<td>5</td>
<td>Contact with local customers who may not shop online</td>
<td>Will have to spend money to set up booths, may not see immediate returns on investment</td>
</tr>
<tr>
<td>Photography</td>
<td>9</td>
<td>0</td>
<td>• Significant increase to professional appearance of site</td>
<td>No identifiable risks</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Low-cost solution with high impact</td>
<td></td>
</tr>
</tbody>
</table>

Source: Adapted from Pershing (2006).
interventions as soon as feasible, Suzy Q's would have the necessary tools and organizational development structure to reach their business goals. Given the low cost of these solutions, we deemed this to be a feasible plan for Suzy Q's that would have a significant impact on their success.

LESSONS LEARNED
This project was conducted in a graduate human performance technology course. The HPT model helped in following a systematic process while carrying out performance analysis and selecting performance interventions. Through applying this model to a small start-up business, the consulting team learned that even a seemingly straightforward situation could benefit from performance analysis. The insights provided by the HPT process can be an invaluable asset to even the smallest business. Using the HPT model also allowed the consulting team members to realize the difference small changes can make in the performance of a company.

BUSINESS RESULTS
Suzy Q's implemented several of the team's recommendations, including attending the local farmers' market, advertising their farmers' market attendance on Facebook, and consolidating their web presence. The business did see improved revenues for the year and is continuing to grow.

References

REBECCA HAYES is a graduate student in instructional technology at the University of North Carolina Wilmington. She has a BA in journalism from the University of North Carolina and an MA in English from North Carolina State University. Rebecca has 10 years of professional experience as a technical writer and worked at IBM and Nortel Networks before studying instructional technology. She may be reached at rrh6399@uncw.edu.

CAROLINE GODWIN is a technology literacy coach for Craven County Schools. She has a BA in elementary education and an MAEd in elementary education from the University of North Carolina Wilmington. She has 10 years of teaching experience and is currently pursuing a master's degree in instructional technology at the University of North Carolina Wilmington. She may be reached at cbs4058@uncw.edu.

DANIELLE BUTTS is a graduate student at the University of North Carolina Wilmington. She currently works as a technology assistant in the Educational Technology unit at UNCW and is earning her master’s in instructional technology. As an undergraduate at UNCW, she earned her bachelor’s degree in elementary education and a Chinese language certificate from the College of Arts and Science of Beijing Union University. She may be reached at dnb6560@uncw.edu.

FLORENCE MARTIN, PhD, is an associate professor in the Instructional Systems Technology program at the University of North Carolina, Charlotte. She received her doctorate and master’s in educational technology from Arizona State University. Previous to her current position, she taught at the University of North Carolina Wilmington for seven years. She also worked on instructional design projects for Maricopa Community College, University of Phoenix, Intel, Cisco Learning Institute, and Arizona State University. She worked as a co–principal investigator on the Digital Visual Literacy NSF grant working with Maricopa Community College District in Arizona. Her research interests include technology tools that improve learning and performance including synchronous virtual classrooms, mobile technologies, learning technologies, and so on. She served as the president of the Multimedia Production Division at AECT from 2012 to 2013. She can be reached at florence.martin@uncc.edu.