Bachelor thesis

"If you cannot measure it, you cannot improve it"

A research in discovering how RS Sailing can keep track of its global dealers

by
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Abstract

RS Sailing is currently lacking sufficient monitoring the performance of their global dealers because the management system of RS Sailing did not grow along with the growth the company went through. Therefore, a structured approach to keep track on their global dealers performances is desired.

The aim of this study is to establish initial steps towards the development of a dashboard in guidance with the Sales Balanced ScoreCard alongside internal company data. To this end, the following research question has been defined:

"In what way should RS Sailing track the progress of their global dealers in order to achieve the set company objectives and maintain these in future perspective?"

The research question has been answered by applying qualitative research, wherefore seven employees were interviewed as the internal data is of crucial importance. Additionally, the information gap that was left has been replenished with the use of desk research. The dimensions 'Uniqueness' and 'Success factors' of the interviews have given the input to formulate the CSFs. The dimension 'Objectives' has formed the most input for the KPIs.

The response received shows the importance of the collaboration with the dealers and the aim of increasing sales.

On this basis, it is recommended to firstly establish the CSFs and KPIs and to complete the Sales Balanced ScoreCard. Secondly, assigning targets to every KPI enhances the value of the ultimate dashboard. Thirdly, assigning responsible persons for implementing and maintaining the dashboard is highly advised.

Definitions of key terms

In this paragraph is a list of definitions of key terms and abbreviations included, which will be used throughout this research report. Moreover, this will make the supplied information in this report easier to understand.

RS	Racing Sailboats; the abbreviation of the company name "RS Sailing"
Research question	"A single, open question that triggers the search for information and may be split into sub-questions (Bont, 2014)."
Sub-question	"A single, open question that triggers the search for information and that contributes to answering a research question (Bont, 2014)."
Objectives	"A specific result that a person or system aims to achieve within a time frame and with available resources (Business Dictionary, 2017)."
Strategy	"A method or plan chosen to bring about a desired future, such as achievement of a goal or solution to a problem (Business Dictionary, 2017)."
Critical Success Factors (CSFs)	"Limited number (usually 3 to 8) of characteristics, conditions, or variables that have a direct and serious impact on the effectiveness, efficiency, and viability of an organization, program, or project. Activities associated with CSF must be performed at the highest possible level of excellence to achieve the intended overall objectives (Business Dictionary, 2017)."
Key Performance Indicators (KPIs)	"In simple terms, a KPI is a way of measuring how well we as individuals or how well entire companies or business units are performing. KPI is short for Key Performance Indicator. A KPI should help us understand how well a company, business unit or individual is performing compared to their strategic goals and objectives (Marr, 2017)."
Relationship between CSF's and KPI's	CSF's based on the success and core drivers of the business are the baseline for KPIs. One CSF can lead to multiple KPIs to measure the company achievements.
Sales Balanced ScoreCard	"A model of several critical success factors and key performance indicators based on the specific sales situation of an organisation. This gives sales management not only the possibility to formulate strategy and objectives, but also realize it (Nuhaan & den Dunnen, 2017)."
Dashboard	"An executive information system available for computers that offers a set of customizable windows and data portals. Information helpful to business managers available on a digital dashboard might include stock prices, weather data, a calendar management function, e-mail access, news feeds and various types of company specific information (Business Dictionary, 2017)."
Global/ International/ worldwide	Pertaining to the entire globe rather than a specific region or country. Often used interchangeably with the term international, with one exception being in regards to mutual funds. When dealing with mutual funds, a global fund pertains to the entire world, while an

	international fund deals with all countries except the United States. Also called worldwide (Business Dictionary, 2017)."
Dealer	Individual or firm that buys goods from a producer or distributor for wholesale and/or retail reselling. Unlike a distributor, a dealer is a principal and not an agent (Business Dictionary, 2017)."
Business to business (B2B) Wholesaling	Trading between firms; characterized by (1) relatively large volumes, (2) competitive and stable prices, (3) fast delivery times and, often, (4) on deferred payment basis. *In general, wholesaling is B2B and retailing is B2C* (Business Dictionary, 2017)."
Qualitative research	Examination of non-measurable data such as a firm's reputation, a brand' image, or a customer's feelings about a product. See also quantitative analysis (Business Dictionary, 2017)."
Quantitative research	"The use of sampling techniques (such as surveys) whose findings may be expressed numerically, and are amenable to mathematical manipulation enabling the researcher to estimate future events or quantities (Business Dictionary, 2017)."
Desk research	Gathering and analysing information, already available in print or published on the internet (Business Dictionary, 2017)."

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1. Introduction

This report presents the statement of the research problem of the company RS Sailing. Firstly, this research displays extensively what the problem and its cause are about and unravels the adverse effects of the current situation of RS Sailing. Secondly, it addresses why the problem needs to be solved and what advantages this will bring to the business. Next, it poses how the problem will be solved along with proper resources, as well as with convenient methodology and tools. Lastly, the main findings will be exposed and the therewith recommendations put forward.

1.1. RS Sailing

'The international award-winning sailboat range' is what RS Sailing enlarged to and captured this title after they have been part of the small sailboat industry for about the last 25 years. The idea for realising new sailing classes in order to upgrade and widen the 'community', arose by a group of enthusiastic sailors who were craving for more challenge. Furthermore, this happening did not only remain by building boats, but expanded to an RS circuit with multiple sailing events yearly.
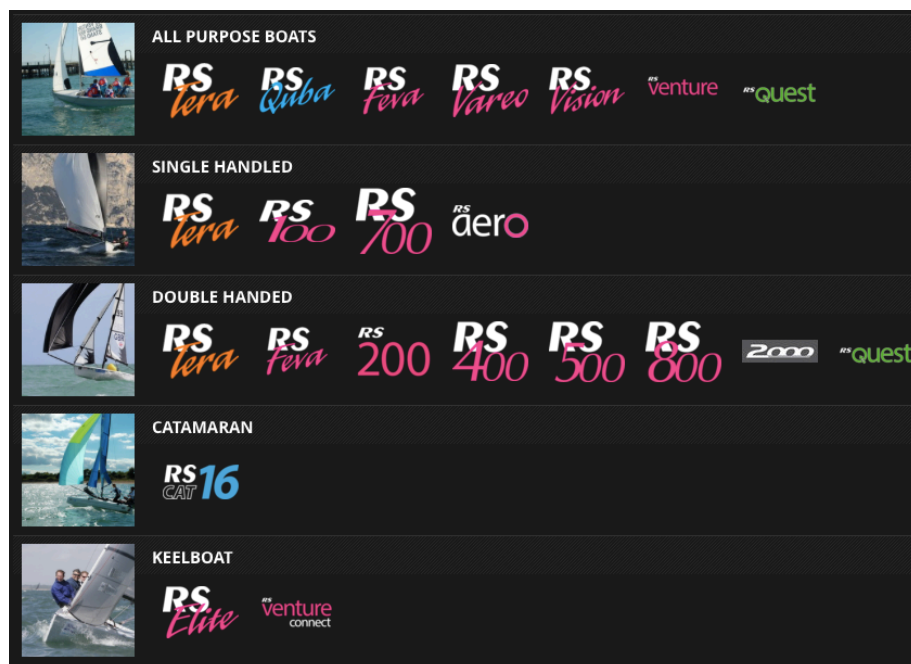

Figure 1 The RS sailing range (RS Sailing, 2017)

Location Head Office
The headquarter of RS Sailing, consisting of warehouse, (work)shop, showroom and office, is located in Romsey, which is situated above Southampton on the South Coast of the United Kingdom.

Figure 2 Location head office RS Sailing, Romsey UK (Google, 2017)

1.2. Global dealers

Additionally, RS Sailing managed to extend their local community they started up in the United Kingdom, into a global brand with dealership in 48 countries all over the world. The Global dealer network, who are wholesalers of RS Sailing, consists of independent companies with a great loyalty for the brand. Furthermore, the company has a solid relationship with the majority of the dealers for over ten years. RS Sailing manages its worldwide business from the head office in Romsey in cooperation with their dealers who are operating from their established venues. Shortly, the business to business (B2B) trading system of RS Sailing involves all the 48 global dealers.

Thus, the global dealers are part of the business culture of RS Sailing, who are operating independently on a local level. The responsibilities of the dealers consist of sales, marketing, distribution and after-sales service related, which are all on a local scale. RS Sailing itself is operating on a global scale of which innovation, research and development are centralised. Followed by, production, logistics, global marketing and technical product after-sales.

1.3. Mission & vision

The following statement is the mission of RS Sailing:

"RS Sailing is a world-class sailboat brand with premium parts supply, redefining the sport of sailing"

The Vision of RS Sailing is as follows:

"Sailing should be available for everyone, uncomplicated enjoyment, with exciting innovative products, creating friends for life while having fun on a global scale"

The vision of RS Sailing goes beyond producing the best sailing boats: "We aim to develop boats and classes that will inspire a new generation of sailors (Sailing, RS, 2017)."

In other words, producing and selling boats is not only their only aim. In addition, creating solutions to grow the sailing sport and spread the passion for the sailing sport is their business ambition. Nevertheless, RS Sailing strives towards advantages for their existing sailing society as well as their potential clients. This can be seen by their active participation in class associations, sailing schools and training zones as well as in global sailing events. Whereas the mission of RS Sailing has its focus on the present and how they are planning to achieve the set objectives, the vision is directed to desires and inspiring plans in future perspective.

1.4. Background information

RS Sailing has become the leader for small dinghies and racing sailboats among a range of 18 different boats. With over 3500 boats sold per year and over 25000 parts and accessories, the business has grown significantly over the past few years.
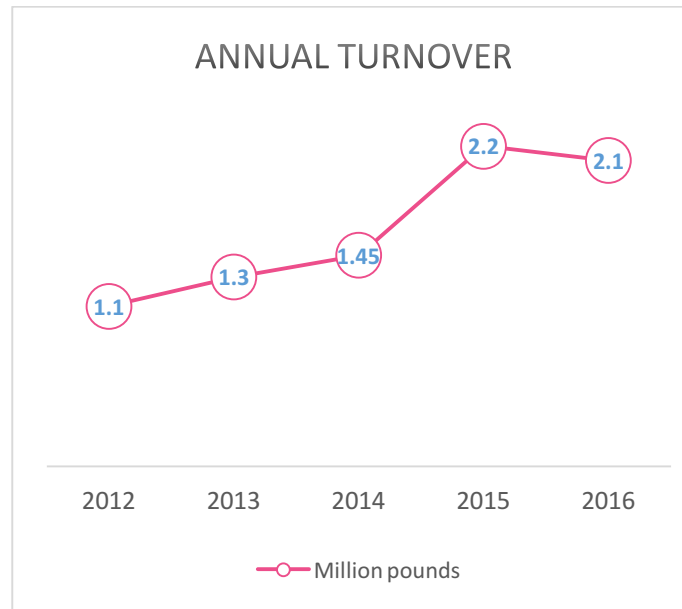
Figure 3 The annual turnover of the dealers of RS Sailing (Sailing, 2016)

The above graph shows the annual turnover in million pounds per year of the European dealers of RS Sailing from 2012 until 2016. In 2015, the annual turnover has increased significantly to £2.2 million. The year after, RS Sailing reached an annual turnover of £2.1 million. Admittedly, RS Sailing suffered a gentle decrease from 2015 to 2016. Nevertheless, the business met a better profit as they had in the previous year. In 2015 RS Sailing has had a serious rise in annual turnover, this was due to the development in innovation, which shows the health of the company. Furthermore, this was the period where RS Sailing expanded their range with the launch of the RS Aero and the RS Quest.

To put this into perspective, the company grew positively whereby they have been building their international distribution, increased sales and expanded on their global dealers.

1.5. Current situation

The company is currently lacking sufficient monitoring the performance of the dealers on what their dealers are doing to perform, as the management system did not grow along. For instance, what are they investing in terms of money as well as the actions they undertake to stay loyal to the brand and support the brand RS Sailing? Attending boat shows, doing sail demo's and organising sailing events are examples of activities the dealers can do in adding value to RS Sailing. Moreover, these activities obtain an increase in sales as well as in brand awareness for RS Sailing.

Although all dealers of RS Sailing are independent companies, who take part in the business network of RS Sailing, they must meet the set-up agreements and the related goals. In other words, the dealers should perform and hit targets laid down in agreement with RS Sailing.

This should be measured and notified by RS Sailing in order to keep track of the actual performance accomplished by the global dealers.

Nevertheless, the company faces deficiency in structured management information as well as drawbacks of having a blurry view on their performance (Econsultancy, 2013).

A possible downside of not reacting and/ or tackling these developments might have negative influences on the decisions making process. Currently, RS Sailing does not make their decisions upon facts. For the company to have the possibility of making decision upon reliable information, a tool is desired.

Expressively, the company could face declining satisfaction by their dealers and its customers. Also, implementing a dashboard must lead in decreasing numbers in missing out on important issues as well as declining failures in accountability by their dealers (Geckoboard, 2017).

Research gap

In accordance with the previously given information, further research is required to be able to grasp a suitable counter reaction in assessing the performance of the dealers and to maintain the continued growth of the company. This is the reason RS sailing wants to proceed in developing an informative dashboard, which will give the company a transparent overview of the marketing and sales oriented performance and health aspects of their global dealers.

Beneficially to this process, it is necessary to go through a development from a reactive work approach, towards a proactive and efficient work policy in future perspective. Accurate business data will give information about the health of the company, which should be visualized to supply the knowledge based on facts (Hippoline B.V., 2017).

It is essential to determine what objectives and goals RS Sailing want to obtain. Therefore, it is of crucial importance to gain a clear view on the business strategy of the company towards its global dealers. Moreover, what are the objectives of RS Sailing towards its dealers and how will these be achieved? Also, the strengths of the company should be determined, so what makes RS Sailing successful? And how does RS Sailing measure the business performance based on accurate data? Hence, what are the CSFs and KPIs of RS Sailing?

Managing the business, based on facts and developments, becomes a challenge without accurate management data. "Fast-growing teams struggle with focus: When you grow quickly, team members lose track of company goals, get distracted by low-impact tasks, and miss what's important right now (Geckoboard, 2017)."

To be able to cover the information gaps with business data, research would be required to be undertaken into the organisation as well as into the employees working for the company at the Head office of RS Sailing. Besides, business information is of high importance beneficially to factual project outcomes, which makes it for the company achievable to make data-driven decisions. In other words, decisions made on facts driven by business data. (Econsultancy, 2013)

1.6. Problem statement

RS Sailing does not have a structured approach towards the commercial business results they are seeking for in tracking the performance of its global dealers.

1.7. Research question

As a result of the problem statement of RS sailing, the following research question has been defined:

"In what way should RS Sailing track the progress of their global dealers in order to achieve the set company objectives and maintain these in future perspective?"

1.8. Sub-questions

In relation to the research question and the project aim, the following sub-questions have been determined, which will contribute to answering the research question:

1. What is the relation between the strategy and the objectives of RS Sailing and the activities of the global dealers?
2. What factors are critical to the achievement of the objectives?
3. Can these objectives and CSFs be translated into KPIs?
4. How will the CSFs and KPIs be translated into a readable dashboard for both management and dealers?
5. How will this dashboard be implemented and maintained to be valuable for the business?

1.9. Research scope

This research project focuses on the commercial internal company data of RS Sailing concerning developing the initial steps towards a dashboard in guidance of the Sales Balanced ScoreCard. The findings that will derive from the Sales Balanced ScoreCard should support RS Sailing in developing a dashboard. Followed by the implementation process of the dashboard based on internal business data directed to the global dealers of RS Sailing. Furthermore, this dashboard is meant to be maintained by the management as well as the global dealers in future perspectives. In other words, an active use of the dashboard in long-term as well as optimizing the tool should lead to a transformation of the current work approach towards a proactive work policy.

In short, this research is the start of an ongoing project that will be accomplished by RS Sailing. At its completion, this research intends to provide a solid foundation, based on internal data, for RS Sailing to elaborate upon.

1.10. Research objectives

Firstly, the research approach of this investigation examines how the desired objectives with the stated strategy by RS Sailing will be obtained.

Secondly, the success factors of RS Sailing will be unravelled.

Thirdly, measurable indicators will be formulated.

Fourthly, the main aim of this research project is to create accurate CSFs and KPIs as initial input for a dashboard that is sales and marketing orientated.

Lastly, this tool will be developed and implemented by RS Sailing after completion of this research. This dashboard is aimed to maintain in future perspective to obtain increased sales of the global dealers.

1.11. Preliminary limitations

The external factors (i.e. market data) are left out and will not have influence on this research.

To elaborate on the above-given information, to obtain accurate and aligned company data, this investigation will focus on the internal profile of RS Sailing. In extension to the global dealers of RS Sailing, who belong to the internal environment, this data will also be taken into consideration. Furthermore, the data of the global dealers will only have influence on this research project with its business activities in relation to commercial activities for RS Sailing.

1.12. Reader's guide

The structure of this research is as follows;

Firstly, in chapter 1: 'Introduction' has the company been introduced, the problem statement with the research question and sub-questions, followed by the scope and objectives of the research. Secondly will the 'Theoretical framework' be presented in chapter 2. Thirdly, chapter 3 will outline the 'Method' of the research. Followed by chapter 4 that includes the 'Results' of the research. Lastly, the research will be brought to a close in chapter 5 'Discussion' and chapter 6 with 'Recommendations & Conclusions'.

Figure 4 Reader's guide
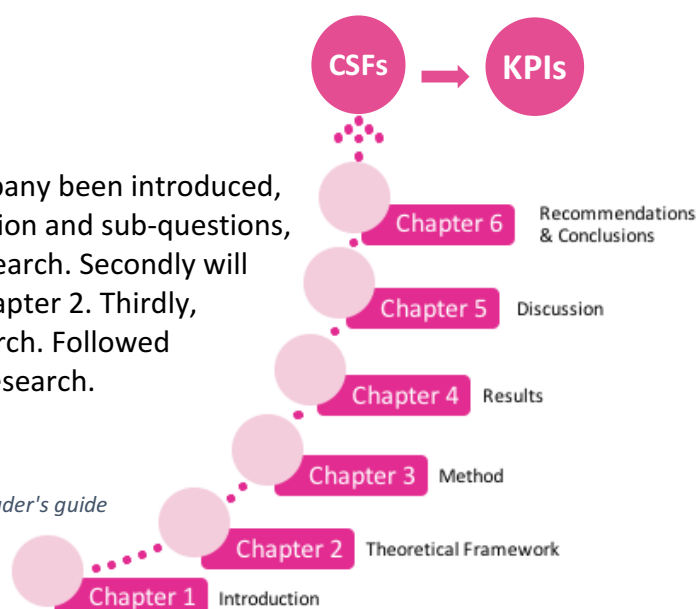
2. Theoretical framework

The second chapter 'theoretical framework', will give an overview of the most significant sources that have been used along with this research project. RS Sailing aims to obtain an enhanced structured view on the sales business results of its dealers all around the globe. Due to the growth of the company, they are seeking opportunities to have the ability to keep track on the performance of their dealers and support them where possible and where necessary. Therefore, this research project is of vital importance for the continued growth of the company. In future perspective, the company intends to develop and implement a dashboard to support its global dealers as well as to obtain an increase in its sales numbers.

The following data will give a clarifying overview, that will contribute to a better understanding of why and how the research has been conducted. Furthermore, this chapter highlights what requires investigation before kicking off the major research. This preliminary investigation supports the overall performance in preparing this research.

First of all, the Sales Balanced ScoreCard will be introduced as the leading tool throughout the project. Followed by helpful clarification, further appropriate tools and a framework will be taken into consideration. The second section of this paragraph will look at 'performance measurement', which is the tool to check the business performance of RS Sailing. Furthermore, CSFs and KPIs will play a powerful role and will get relevant consideration. Ultimately, findings will be presented at the end of this chapter.

2.1. The Sales Balanced ScoreCard

The actions the company undertakes are driven and supported by the strategy of the business. The business strategy lays in connection with the mission and vision (see page 2) of the company. The mission, vision and strategy are the core drivers of the company. This alignment must be the first step in visualising the success factors of RS Sailing. The CSFs are key in formulating KPIs, explained by Laura Nuhaan and Paul Den Dunnen (Nuhaan & den Dunnen, 2000), as the KPIs will measure the companies CSFs. 'The Sales Balanced ScoreCard' by 'SalesPro Business Consulting BV' (Nuhaan & den Dunnen, 2000) is inspired on the 'Balanced ScoreCard' by Drs Robert Kaplan and Dr David Norton (Kaplan, 2017). The Sales Balanced ScoreCard, which focusses especially on sales, is most suitable for this project as this research is directed to the sales performance of RS Sailing. This method will support obtaining a clear view on the dealers of RS Sailing along with the four perspectives that are included in the Sales Balanced ScoreCard management tool.

2.2. Core drivers

The introduced tool in figure 5 'The Balanced ScoreCard' is the leading model throughout this project and will facilitate in translating the strategy of RS Sailing into action. "The BSC can be seen as a strategy-related performance-management system based on a particular collection of critical indicators that measure managerial performance when implementing the business strategy (Hu, Leopold-Wildburger, & Strohhecker, 2016)." As displayed, the Vision and Strategy are the core drivers of success. It is of crucial importance that all activities are in connection with the core to long-term success. The vision and strategy accompanied with the four perspectives define key factors that make RS Sailing successful.
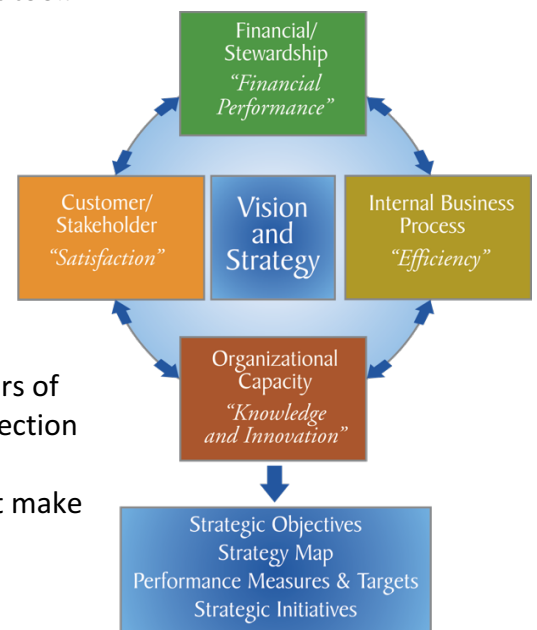
Figure 5 The Balanced ScoreCard as a Strategic Management System (Kaplan, 2017)

2.3. Four perspectives

It all starts with the internal business process; what is RS Sailing doing, how is the company doing this and why are they doing it that way? Is it successful or can these actions be improved? This process is an important factor within a business what might transfer in growth. Secondly, the perspective: 'Learning & Growth' to keep the company improving. Evaluating what has been done for what aim, with what result. Was this positive or negative? This perspective will enhance knowledge to redevelop the process and drives innovation. Thirdly; 'Customer', which can be formulated as 'Distributor' regarding RS Sailing; How do the dealers see the business RS Sailing? What are their expectations? Has a satisfied dealer input on the growth of the company? Alternatively, a dissatisfied dealer? At the end are the distributors of RS Sailing the factor of continuous growth.

These three perspectives are input for the financial perspective, which is the bottom line and shows the output. Was the input, so the investment done by RS Sailing, worth the result. What has been invested and what was the result of this. In other words, what is the input for the output? Does the input for boat shows values the end-result, so the financial output of the actions done? e.g. a £5000 marketing budget has been invested in a boat show; does RS Sailing earn this money back in sales related to the boat show?

In conclusion on this model, non-finance perspectives are key to rewarding financial output.

From the point of view of Kaplan and Norton, visualised in figure 4, stretches out the given information by Laura Nuhaan and Paul den Dunnen (Nuhaan & den Dunnen, 2000).

The tool in figure 6 underneath is an overview of how the BSC can be linked to the corporate strategies and goals. Kaplan and Norton propose this approach:
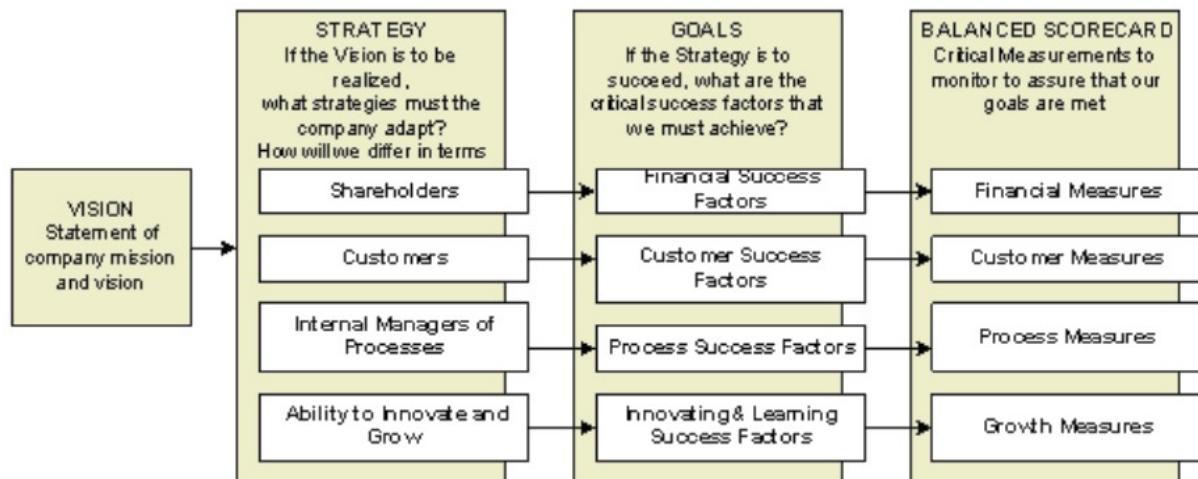
Figure 6 Linking Strategies to the Sales Balanced ScoreCard Measures (Harmon, 2009)

As to complete all the desired steps in a specific order has come to an action plan as can be seen from the following figure 7. This framework is a 'nine step' approach where all previously given steps, as well as additional upcoming steps, fall in together towards success in the future based on the Sales Balanced ScoreCard.

Figure 7 The Sales Balanced ScoreCard Development framework (L.C.I. Nuhaan, 2000)

2.4. Performance measurement

As a follow-up, the Sales Balanced ScoreCard will complement the next section in covering all the presented steps. What and why is it necessary to measure the business performance? In other words, what should be investigated in this process.
Various steps in the phase of measuring the performance of the business are being covered in this section.

First of all, the researcher has decided to centralise one of the various definitions that are available of 'Performance measurement'. Referring to the article 'Towards a definition of a business performance measurement system' shows the confusions concerning the availability of different definitions on performance management (Franco-Santos, Kennerley, Micheli, Martinez, & Mason, 2007). Demarcating the most appropriate description minimises possible misunderstanding by the reader. The following definition has been chosen, because it outlines the importance of strategic planning, monitoring and contractual relationships, which are significant to this research. "Our approach to performance measurement focuses on one output of strategic planning: senior management's choice of the nature and scope of the contracts that is negotiated, both explicitly and implicitly, with its stakeholders. The performance measurement system is the tool the company uses to monitor those contractual relationships (Atkinson et al., 1997)."

The main performance measurement instruments are: 'Critical Success Factors' (CSFs) and 'Key Performance Indicators' (KPIs) by Kaplan and Norton (Norton, 2001). They play a significant role in obtaining measurable indicators on the business performance to answer the sub-questions partially.

Besides, a guidance in designing and implementing KPIs with a correct usage will be supported by the book 'Key Performance Indicators' by Bernard Marr (Marr, 2015).
KPIs are effective in evaluating the way a company has been working and accomplishing certain activities with an established outcome. The action based on obtaining the set business objectives are as valuable as the KPIs.
"A Key Performance Indicator is a measurable value that demonstrates how effectively a company is achieving key business objectives. Organisations use KPIs at multiple levels to evaluate their success at reaching targets. High-level KPIs may focus on the overall performance of the enterprise, while low-level KPIs may focus on processes in departments such as sales, marketing or a call centre (Klipfolio inc., 2017)."
These indicators reflect the organisations objectives, they are quantifiable and lastly, KPIs are related to the CSFs of a company. So, it is of imperative priority for RS Sailing to analyse and indicate the business performance, which will help to clarify the desired indicators where the business need to measure on beneficial to acquire validated data. Those KPIs are quantifiable measurable factors that are a guidance for the company in future terms, which are derived and accompanied by CSFs (Nuhaan & den Dunnen, 2000). The CSFs are variables that need specified observation, since these factors are the drive of success for the business. Moreover, one CSFs can have multiple KPIs.

2.5. Operation procedure

Defining the tangible KPIs in regard to the business strategy and objectives will entail complexity before these will be set in stone. In order to obtain the desired KPIs multiple question apply by 'Klipfoli': "What is your desired outcome? Why does this outcome matter? How are you going to measure progress? How can you influence the outcome? Who is responsible for the business outcome? How will you know you've achieved your outcome? How often will you review progress towards the outcome? (Klipfolio inc., 2017)."

Figure 8 displays the connection and order between the factors that should lead to measurable indicators. In brief, goals support the vision and objectives and add detail to the goals. A strong vision followed by company goals and business objectives supports in formulating the CSFs. After that, the KPIs can be formulated to be able to measure the business performance by certain metrics.

Figure 8 Top-down approach (Hill, 2014)

The following action plan displays the steps to be made to acquire enhanced performance. The core drivers of the business, the outlined vision and the strategy of RS Sailing, are the basics in measuring performance in relation to the CSFs and KPIs. Followed by the development and implementation phase of the dashboard. The final product, a dashboard directed to the global dealers, must lead to an enhancement for RS Sailing. (Nuhaan & den Dunnen, 2000)

Strategy → CSFs → KPIs → Development → Implementation → Enhancement

Figure 9 Operation procedure

Bernard Marr claims that both, implementing and maintaining the dashboard can be challenging (Marr, 2015). Therefore, the implementation stage, which will take place after completion of this research and after RS Sailing has developed the dashboard, will also be taken into consideration.

2.6. Pros and cons Sales Balanced ScoreCard

The Sales Balanced Scorecard is a framework of CSFs along with a selection of KPIs tailored on the sales situation of the business.

The following listing includes pros (+) and cons (-) regarding the use of the Sales Balanced ScoreCard (SBSC) in reference to RS Sailing and its dealers (Nuhaan & den Dunnen, 2000).

+ The SBSC is connected to the core drivers of RS Sailing; the mission, vision and strategy.
+ The SBSC supplies an insight view on the crucial factors regarding the commercial performance of the dealers.
+ This tool does not only measure financial performance, but also the non-financial activities of the dealers.
+ The effectiveness and efficiency improvements lay in close connection in being able to measure performance.
+ The SBSC allows RS Sailing to be able to keep track of the performance of their global dealers remotely.
+ The global dealers of RS Sailing have excess to a readable overview of their individual performance.
+ With the use of the dashboard, the dealers can actively be supported and motivated from a totally different level, which can lead to increased involvement in the company.

- The process of developing an SBSC is time-consuming.
- The SBSC is not by definition specified on a particular business. Therefore, the tool needs first tailoring in specifying the CSFs and KPIs beneficially to RS Sailing.
- It needs to give the dealers an extensive introduction and ongoing guidance in the use of the ultimate dashboard before the usage becomes effective.
- The SBSC needs continuous adjustment and improvement to keep the tool effectively with current figures that matter.
- In case RS Sailing changes its company strategy or corporate priorities, the KPIs must be reformulated.

The above given statements show the benefits by using the Sales Balanced ScoreCard in developing a dashboard for RS Sailing as well as for its dealers. The enumeration presents advantages for the management as well as for the distributors. Although this list includes disadvantages for both the business and dealers, the beneficial side exceeds.

2.7. Findings

Based on the concepts that have been discussed previously, the results of this chapter will be presented. The leading tool throughout the research project is the Sales Balanced ScoreCard (Nuhaan & den Dunnen, 2000). Following this, the CSFs and KPIs by Kaplan and Norton (Norton, 2001) were brought to light in the section 'performance measurement' (Nuhaan & den Dunnen, 2000). Additionally, an operation procedure displays the action plan to increase enhanced improvements (Nuhaan & den Dunnen, 2000). Followed by a 'top-down approach' (Hill, 2014) and a syllabus of the operation procedure. In the last section are pros and cons of the usage of the Sales Balanced ScoreCard listed, which shows the relevance as well as the points of interests.

The deep insight and knowledge that has been gathered in this chapter will support the researcher in achieving the set research objectives.

3. Research design

This paragraph introduces how the research objectives have been achieved. It will precisely present the methods that have been applied to the research along with the sub-questions that have been presented in the first chapter.

Methodology structure
First of all, the following overview provides the main research question of this research. Followed by a clear overview of the methodology structure and which methods apply to which sub-question. The order of the sub-questions will be a guidance throughout this chapter.

RESEARCH QUESTION:

"IN WHAT WAY SHOULD RS SAILING TRACK THE PROGRESS OF THEIR GLOBAL DEALERS IN ORDER TO ACHIEVE THE SET COMPANY OBJECTIVES AND MAINTAIN THESE IN FUTURE PERSPECTIVE?"

METHODOLOGY	Method	Sub-questions
RESEARCH APPROACH	✓ Qualitative research	What is the relation between the strategy and the objectives of RS Sailing and the activities of the global dealers?
RESEARCH APPROACH	✓ Qualitative research	What factors are critical to the achievement of the objectives?
RESEARCH STRATEGY	✓ Desk research	Can these objectives and CSFs be translated into KPIs?
RESEARCH STRATEGY/ DATA COLLECTION	✓ Sales Balanced ScoreCard ✓ Desk research	How will the CSFs and KPIs be translated into a readable dashboard for both management and dealers?
DATA COLLECTION	✓ Desk research	How will this dashboard be implemented and maintained to be valuable for the business?

3.1. Research purpose

This section is directed to the research question, that should be answered in line with the research objectives. According to Saunders (Saunders, 2009), the research question will either result in descriptive, explanatory or in descriptive and explanatory answers. In extension, this research is meant to the current happenings and investigate new insights within the business.

The outcome is of high importance for the business and later on for its global dealers. Not only at present but predominantly in future perspective as the dashboard is aimed to be developed and implemented after completion of this research.

The research uses descriptive research, which consists of (preliminary) desk research. Next, to conduct the exploratory study has 'experts' in the subject been interviewed. Followed by a search of literature to continue the process of obtaining the desired information. In brief, the research purpose of this project comes down to a combination of a descriptive research followed by an exploratory study (Saunders, 2009).

3.2. Preliminary study

The European business development manager has given me an extensive introduction of RS Sailing on its course of business. This meeting took place prior to the start of the research. Hereafter, the stated research problem and the therewith formulated research question and sub-questions followed. The theoretical framework came next.

3.3. Research approach

Internal business data of RS Sailing is key in obtaining desired information to be able to complete this research project. The outcome is of high importance for the business and later for its global dealers. Not only at present but predominantly in future perspective as the dashboard is aimed to be developed and implemented after completion of this research.

This data collection process will include a deductive approach in which qualitative research will take place. This will be done by composing interviews to collect a solid perception regarding the research as well as the process being enacted. This case study strategy is most suitable for an exploratory and descriptive research according to Saunders (Saunders, 2009).

After, the preliminary study started with internal research by doing qualitative research as the first methodology. The qualitative research has been translated by conducting interviews with seven appointed employees of RS Sailing. A second 'meeting' was considered as internal data is vital to this project. However, as the interviewees provided extensive information, this further step was considered unnecessary.

By accomplishing the interviews, sufficient information has been gathered and the saturation point has been reached. Therefore, the researcher has decided to drop quantitative research. Desk research has complemented to the obtained information by doing internal research. Books have been consulted to cover the information gap that was left after accomplishing qualitative research. An operationalisation table is included that shows the process of defining and specifying the introduced concepts.

3.4. Qualitative research

First of all, internal data has been gathered by doing qualitative research, a holistic research. For this stage, seven employees of RS Sailing were interviewed concerning the research problem directed to the first two sub-questions. These interviews took place face-to-face among the employees of RS Sailing to obtain relevant and accurate sufficient information. Moreover, seven employees have been interviewed as the aim was to interview at least one person per department. The following departments apply: financial department, commercial department, sales department, operations department. In addition, the directors of RS Sailing are an important link in obtaining accurate data, especially in regards to the first sub-question. These interviews have not only taken place to get the research problem transparent, but also to gather sufficient information of the business and to have a good view on the Strategy and the objectives of RS Sailing.

3.5. Semi-structured interviews

The method of doing qualitative research is chosen to be 'semi-structured'. The characteristics of semi-structured interviews have proceeded with the use of an interview guide, which is a list of questions and topics in a specific order that is desired to be covered during the interview. Some of the interviewees were supplying additional information, that was applicable to the topics. This information has been taken into account as considerable valuable input. This is seen as a benefit since the interviewees have the freedom to express their own views (Cohen, 2006). Although the input given by the interviewees were topic related, not all information was applicable to the project.

3.6. Interview design

The research design in appendix 1 has been used as the guidance while preparing every individual interview. The first template in appendix 1 displays what topics have been discussed, with who and in what order. The order has to do with the hierarchy of the company of RS Sailing. The work approach applied on the interviews has taken place from top to bottom. Moreover, this has to do with the importance of the questions in relation to the sub-questions as well as to have the possibility to check the given information by the previous interviewee in comparison with the following interviewee and the other way around. Different questions apply on different individuals which have to do with their responsibilities within the company. In this way, a division has been made in 5 different rounds with the questions that apply on the assigned interviewees.

At the end of appendix 1 can an information sheet be found. This information sheet displays further information on the main interview topics. The information supplied on the information sheet derives either from the website or from the introduction that the researcher got at the beginning of the project. This information sheet has supported the interviewees in visualising aspects where they had to give answers on.

3.7. Interviewees

The employees which were interviewed are working closely, or are at least involved, with the global dealers of RS Sailing. Nevertheless, they all work in different departments and have different responsibilities in the management chain. They have been adding valuable data with the knowledge they possess. In this way, it was significant to approach all the seven individuals to gain a clear view and gather solid data by collecting it from various sources.

The following table presents an overview on the interviews; when they have taken place, on what date, what time and where. Every interviewee has its own 'code' as displayed below, which are the initials of the interviewee. Also, a detailed overview per interviewee with further information is presented in appendix 1.

Round	Date	Time	Location	Interviewee	Code
1	Tuesday, 25 April 2017	11.00	Meeting room	1) Riki Hooker	RH
		14.00	Office Jon	2) Jon Partridge	JP
		16.00	Meeting room	3) Michiel Geerling	MG
2	Wednesday, 26 April 2017	10.00	Meeting room	4) Andy Taphouse	AT
3		14.00	Office Andy	5) Steve Dean	SD
4	Thursday, 27 April 2017	14.00	Meeting room	6) Richard Kennedy	RK
5	Friday, 28 April 2017	10.00	Meeting room	7) Richard Frost	RF

Table 1 Overview interviewees

3.8. Data processing

The seven semi-structured interviews, which took place during the 4 days period from Tuesday 25th until Friday 28th of April 2017, have been recorded. To prevent the risk of missing out on information, these recordings have supported the researcher to outline a detailed and precise script. As a result, these interviews have led to a profound insight as well as a justifying start in answering the first two sub-questions. A full colour coded transcript of each interview can be found in appendix 4. Colour labels for assigning units of meaning to the description of the compiled information.

3.9. Desk research

Thirdly, sources as internet and books have been consulted. Desk research has been of reasonable importance for this research projects and has constituted of a feasible amount of input in answering the last three sub-questions. The following two management books have been consulted:

- Een beter verkoopresultaat met de Sales-Balenced Scorebard (by Laura Nuhaan & Paul Den Dunnen – Samson) (Nuhaan & den Dunnen, 2000)
- Key performance indicators (by Bernard Marr – John Wiley & Sons, Ltd) (Marr, 2015)

A conceptualisation of doing desk research is included in appendix 2. From this table can be seen how the appointed books, and which chapters of the book, accompanied with variables, have supported in answering which sub-questions.

3.10.   Operationalisation

The table in appendix 3 provides an overview of the operationalisation of the overall research. In this section are the important concepts of this research included and divided into topics and covered by indicators. Moreover, the applicable method is assigned as well as the interview questions that are included in this scheme. The operationalisation table also increases the validity of this research as it gives an inside view on the probability of covering the research and be able in answering the main questions along the sub-questions.

3.11.   Reliability and validity

The quality of the data, on which the research established, is of essential importance for the value of the results for the business. The findings of this research will be utilised as a starting point for the company in actually developing, as well as implementing a dashboard, which is desired to be maintained internally by the company in future perspective.
Since the project is directed to internal business matters, the research is fully based on internal data. Most of the data was derived from employees of RS Sailing who are reliable sources. This makes the qualitative research approach most valid and appropriate and has the researcher empowered to provide credible conclusions. Since the domain is restricted to a particular group, that is based on internal sources within the business, the effect of this research tool is not influenced by third parties. Furthermore, this elevates the right in making accurate conclusions.
Due to an extensive qualitative research, the quantitative research became redundant and the saturation point has therefore been reached. In this way, the quantitative research would not have valuable input for this research.

3.12.   Ethically

The participants of the interviews were informed about the research project and its aim. Prior to the interviewees, interviewees were asked if they had any objections of recording the interview. The participation in the qualitative research was on a voluntary basis and therefore not mandatory.

3.13.   Data analysis

All the analysed data has been linked together to create new and meaningful information. This was key in having the ability to answer the main research question. Important connections have been exposed by analysing the data from the interviews.
Every single semi-structured interview, consisting of open questions based on different topics, have been processed into a script to analyse the gathered information. After which, the scripts have been coded and categorised with the support of colours. Useful facts have been derived from this research approach.
Next, information has been gathered from the appointed books processed and applied.

3.14.   Saturation point

Since, the researcher has undertaken sufficient interviews, as can be supported by the chapter 'results', the research has reached its 'saturation point' after accomplishing qualitative research. In reference to Saunders (Saunders, 2009); "Data saturation: the stage when any additional data collected provides few, if any, new insights."

In other words, no new desired data will be derived from obtaining questionnaires. Due to this, quantitative research was not of additional value to the research anymore.

3.15.   Research restrictions

The external factors have been left out and therefore, as previously mentioned in the first chapter, do not have any influence on this research project. Merely, the desired information has been derived from internal resources of the company as to obtain accurate, as well as aligned, company data. This research project is based on commercial internal data of RS Sailing. The final product, which is meant to be a dashboard that will be developed after this research, will be directed to the global dealers of RS Sailing, but will stay in responsibility of RS Sailing.

In reference to the KPIs, only tangible KPIs that are aligned with the strategy of RS Sailing may be implemented to the process. KPIs which are not relevant to the strategy are less informative and may cost extra money and time (Marr, 2015).

4. Results

This chapter presents the results that have been conducted by obtaining seven semi-structured interviews. The research design in appendix 1 has been used as a guidance while preparing every individual interview.

The seven semi-structured interviews, which took place within a period 4 days from Tuesday 25th until Friday 28th of April 2017, have been recorded. These recordings of seven interviews have supported the researcher to be able to outline a detailed and precise script.

As a result, these interviews have led to a profound insight as well as a justifying start in answering the first two sub-questions. A full colour coded transcript of each interview can be found in appendix 4. There has been made use of colour labels for assigning units of meaning to the descriptive of the compiled information. The interviewee codes, introduced in the previous chapters, can be seen once more in table 2.

Round	Interviewee	code
1	1. Riki Hooker	RH
	2. Jon Partridge	JP
	3. Michiel Geerling	MG
2	4. Andy Taphouse	AT
3	5. Steve Dean	SD
4	6. Richard Kennedy	RK
5	7. Richard Frost	RF

Table 2 Interviewee codes

4.1. Core drivers RS Sailing

The semi-structured interviews identify the ways in which the interviewees have responded in round 1 on the first concept 'Core drivers RS Sailing'. The main dimensions; strategy, vision and mission of RS Sailing belonging to the core drivers of the business. According to RH, JP and MG has the researcher come to the following results.
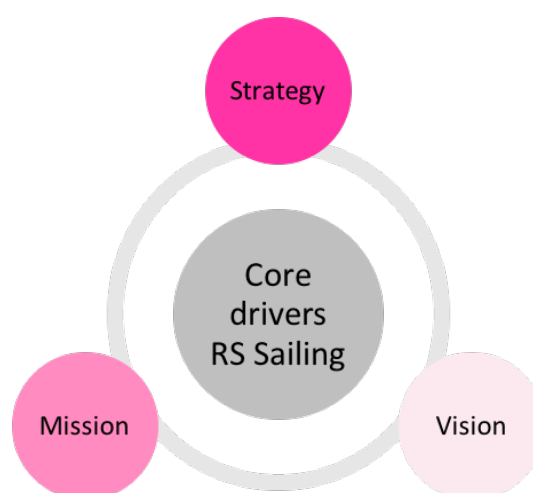
Figure 10 Core drivers RS Sailing

Strategy

"Our over watching strategy is to become and to maintain being the world's largest and foremost smart sailboat manufacture. We want to become household main in small boats and continue the path of doing that. We want to build the largest, strongest and most robust international distribution network for those boats." **RK**

"To become the established and recognised world leading small boat brand and be profitable." **JP**

Certainly, reading the above-stated strategy quotes of RS Sailing it is clear that being and maintaining the largest global recognised leading small boat brand in a profitable way is important. These matters have been endorsed by MG in the following context; "We grow our company by investing in the following points: accessibility of the sports, creating attractive communities, supporting clubs and school, creating smart, good value products and creating a global network of dealers, customers and institutions."
In this way, MG also adds the way in how to reach what RK and JP have stated earlier.

Subsequently, RS Sailing aims to obtain the company strategy, firstly by "Maintaining a valid and current connection with the market around the world" (RH). To pursue the topic, JP adds on; "Through education support and working with the right people. And from my point of view, the right people are persons who have a passion for our values and the sailing sport." MG highlights the fact of "being a good and accessible partner for the dealers." From these assumptions, we can observe that the relationship with the right-minded people, such as dealers, institutions, and other networks, is on a long-term basis fundamental.

Mission
"RS sailing is a world recognised sail boat brand with world class business processes, so that the parts of the company work in a professional way which makes the company work in a cost-effective way." **JP**
Also, RK shared his main thought on the company mission in the following statement: "To build the world class sailing sailboat brand.' Which elaborates on what JP has mentioned previously. Also, MG confirmed the focal centrepiece of a world-class sailboat brand as well as redefining, and in that way, growing the sailing sport by the following statement: "That our brand is perceived similarly in every part of the world. This is about the perception of the stakeholders: Quality, atmosphere, mentality and accessibility."

Vision
What and how they make and sell their products has an important link for the business. With the essential facet of innovation. JP describes innovation as 'Modern products'.

"It is in the product design, material and roots participation. The entire product development with its latest manufacturing technics (innovations)." **RH**

"Continuously innovating and launching concepts and new products. So, SailZone concept is an innovation that makes sailing and our brand better accessible. Also, new boats for the right purpose." **MG**

Next, the service RS Sailing supplies next to their products is their Unique Selling Point from their point of view. The service that comes with buying a product from RS Sailing is all to do with the 'RS Sailing community'. RS Sailing profiles itself not just as a company that sells products, but also supplies a full experience in connecting with like-minded people. Outlined by MG: 'Our products are bringing people together. The events that we support heavily are creating adventures that people share and by adding socials to the events people with the same interests become friends.' Also, this section features the emphasis on all their global

dealers in reference to JP: "Roughly speaking, it applies to 50 active nations sailing in the world."
In brief, the key points in regards to the vision are: innovation, service, community and Global.

Consequently, the published mission and vision by RS Sailing lay in close connection to the business strategy. Shortly, it all comes down to operating innovatively in a cost-effective way on a global scale, providing a service next to their products and foremost being the leading sailing brand.

4.2. Internal Business Process
The second concept to be analysed is the 'Internal Business Process' along with the dimensions; objectives, achievement, function objectives and uniqueness.

Objectives
The objectives (see appendix 1), which have been presented to the interviewees, display the objectives of how RS Sailing itself represents. Increasing sales and being a profitable business has been brought in by RK and JP as main drivers of the business.

> "We need to make profit and generate cash. The most important thing is to keep the business profitable. The bottom-line is to survive, otherwise it is all pointless." **JP**

Objectives should be more literal and underpin what the business is doing from RH's point of view.

> "From a tangible perspective are our objectives very simple: sell more boats (creating a profitable business), serving need of Shareholders and creating a sustainable business model." **RH**

Also, MG has outlined the importance of the passion the RS Sailing team aspires as well as the importance of customer retention besides money related issues.

> "Our main objective is to have a network of people all around the world loving our brand and sailing our boats. Creating great sailing experiences and social events around our products should lead to a further growing loyal customer base. This should result in a viable business." **MG**

In addition, the objectives of RS Sailing for the year 2017 has been brought in by RH:
"Finance Control, maximising the introduction of the RS quest, ongoing potential RS aero 'Do what we do better', meet our targets and set ourselves up for 2018."

In conclusion, RS Sailing aims to be a profitable business that reaches its set targets and increases sales along with sharing their passion for the sailing sport. These objectives lay on top as being most essential.

Achievement
RS Sailing aims to obtain the aforementioned objectives, by investing in what they are doing right and become even better at it. In other words, they will invest in innovation, their team and their global market. Getting this partly down to one sentence by MG: "Be a good and accessible partner for the dealers."

"Maintaining a valid and current connection with the market around the world. Not reacting, but proactively shaping the sport to our products. Because that is what sets us apart as a world class; defining the market." **RK**

"Through education support and working with the right people. And from my point of view, the right people are persons who have a passion for our values and the sailing sport." Basically, we need to invest in our Research & Development so our products are up to date and relevant for the current market." **JP**

Function objectives

The result show from RH, JP and MG that the company objectives match their function objectives. Summarised by MG: "Making RS Sailing the recognised world leading small sailing boat brand by: Selling more (so grow the business), also being profitable and being relevant for the sport; develop the sport as well as being a good business partner for our dealers."

In focus to objectives of RS Sailing, related to specific functions, other objectives came to light;

"Turnover obviously; turnover of the parts which turns over into company turnover. Parts offers, vital cash flow for the business, payments in no terms. Parts has quite a high proportion of the company profit, despite in not being the highest turnover department."
AT

"My first objective is to hit target, so I have got a target for boat sales, year on year boat sales. Which is my primary target. Outside that, to continue the growth of the training zone and continue to create interactive videos on social media. For the last two years, it is growing massively. So, I'm trying to keep improving that and then raise the amount of hits we get on social media, YouTube. There is not a magic number we worked out." **SD**

"To get boats out the door and money in the tail! I think that is the key objective of the business. Invoicing as much as possible and getting the money. The less the boats are build and out the door we can't invoice." **RF**

It is notable, that no matter what function the interviewees are performing within the business there is always one main topic within their individual messages. Distinctively by making as many sales as possible and continues growth in the firm. Moreover, the finance controller of RS Sailing relates to this;

"The objective for me is to get good accounting information out to the shareholders. Ensuring if our margin & stock is accurate. So, we can make good decisions with the data, that is problem one of the main once. **RK**

Uniqueness

While analysing the uniqueness of RS Sailing, several subjects were familiar when linking the different interviews. The products and service with its brand, striving for continuous improvement and people are the main items. To bring these more in context;

"We are the only manufacturer of small sailing boats that are servicing all segments from clubs and schools to racing classes and from leisure sailors to institutional buyers with product that really suit them." **MG**

"Our products and our range, that is what makes us unique. There is not another manufacturer out there that has the brand and depth in the range that we have and our operation is very different." **RF**

These two statements bring forward the main reason in being unique as a brand with its range. Together with the following supportive statements can be assumed that the brand is the most important in being unique.

"I would probably say the brand, because I think our brand is unique. In the fact that people see us being a bit more race orientated, a bit more of a dynamic brand, a social brand." **SD**

"The products in general. Unique sides would be the aftersales and support that we give, we are pretty generous with anyone that buys a boat and we don't even talk about a warranty period, we will help them and work it out anyways." **RK**

Next, the following statements support the continues improvements RS Sailing is aiming for. The cool thing about RS: "We are always trying to get better". **RK**

Followed by statements in relation to the importance how RS Sailing is accomplishing its business activities as well as to who, in other words its people with shared passion who are their employees, dealers, customers; people that belong to their community.

"We wholeheartedly support our dealers, that certainly helps." **RF**

"The people and their passion. Adapt ability; the flexibility the team has of RS Sailing. Product can do the same, you know adjusting developing product that goes with that." **AT**

4.3. Learning and Growth

Thirdly, 'Learning and Growth' is the next concept to be analysed along with the dimensions; Internal evaluation, adaption, indicators and success factors.

Internal evaluation

Firstly, the implementation of a dashboard for RS Sailing to be able to track their dealers, has received an overwhelming response. 100% of the interviewees reacted positively in undertaking the project regarding the dashboard, especially concerning the sales and marketing department.

"I think this is really good though. It is a lot of work, but this is a good project. And it is a perfect time for us as well." **RK**

"I have a good first impression on these indicators, it is all good what is in there." **JP**

"It's good, I can see it will be valuable for sales and marketing, but production and operational wise perhaps less." **RF**

In addition, the researcher discovers the high expectations of the interviewees.

"A living inspirational tool to continuously improve the way we work with the dealers." **MG**

"Based on this, I would like to show them their potential. I would like to set a target, of what they should be doing. But being real; show them also what they potentially could be doing. Whenever they look at the dashboard they can see that there is more potential and there is a growth in spare parts." **AT**

"Well my expectations. I would like the dealer dashboard to be the focal centrepiece of any conversation any phone call, visit. So, I like it to be a tool kit to measure performance success or failure. It will completely shape the conversation." **RK**

The main concern that has risen, has to do with information that has to be supplied by the dealers. By gathering the desired information, before being able in presenting these numbers, is it not for all the indicators possible to obtain the data without input by the dealers.

"All of my concern of the dashboard is that all of this is stuff we need from the dealers, is information they have to supply us." **RK**

Adaption & Indicators

In follow-up to the importance of sales, the most important indicator is; 'Boat sales'. In addition, not only current and expected numbers and target are seen as informative data, but also figures from the past. This gives the possibility to make comparisons regarding experiences and expectations.

"I would like to see historic boat sales. **AT**

"The past is a crucial indicator of performance, all the things you are doing are either success or not good. So, I think you should have prior year information." **RH**

The indicator that must be added, brought in by RH, JP, is events; "All the activities done by the dealers to promote RS Sailing" RH. Besides, interesting to know for RS Sailing; how many activities each dealer is planning to organise and/ or attend beneficially to promote RS Sailing (i.e. boat shows, demo sailing, talks in clubs, webinars, regattas etc.).

"Most essential to me, is boat sales by class, because everything else is part of the conversation that comes out of that information. It is all defined by selling boats and parts." **RH**

In most cases should the indicators be real-time, live data is most convenient for RS Sailing as well as its dealers. This reduces the fact of pushing too much: "It puts too much pressure on them".

In brief, the indicator 'events', along with measurable variables, is worth displaying in the dashboard. Also, further prior year information, i.e. historic boat sales figures as a variable, should be added to boat sales. The dashboard has to be real-time as much as possible.

Success factors

By examining all interviews, united with all the outcomes from each question, the main success factor is 'people'. Workers, dealers and the community is what is understood by 'people'.

"The success of RS Sailing is the customers and its community." **AT**

"The events are key for how successful the brand is. But also, the class association, the RS Sailing community; which are groups of sailors and friends, club sailing. The products are good and our general marketing is overall pretty strong. The name "RS Sailing" is quite cool. Also, the branding is good." **RK**

"The products and the people; the team at the head office of Romsey as well as the dealers around the world. The combination, the dealers are part of the team." **RF**

4.4. Distributors

The qualitative research besides the preliminary investigation has equipped the researcher with profound data regarding the global dealers of RS Sailing.

The distribution network of RS Sailing consists of 48 independent global dealers who operate on a local level. The dealers are established in Europe, Northern Ireland, Africa, Oceania, Asia and the Middle East, South-, Central- and North America, Oceana and Russia (RS Sailing, 2017). Every single dealer has its personalised contract with RS Sailing as well as own agreements with the company. Next to the agreements stated in their contract are the dealers responsible for their achievements. In other words, the dealers are accountable for their sales and meeting targets (Geerling, 2017). However, dealers have close contact with the European Business Development Manager of RS Sailing as well as support. This means he is the first point of contact for the global dealers in ordering boats, making deals as well as complaints and concerns. The European Business Development Manager has at least once a month contact with the dealer to check how the business is going. Also, he visits most of them at the beginning of the year to set up the contract, make agreements and set targets to be reached throughout the year. The European Business Development Manager aims to visit most of the dealers once a year whether it is during an event, meeting or while delivering an order. Moreover, aftersales and any other complaints go via the after-sales manager of RS Sailing. Orders of parts and accessories by the dealers goes via the parts manager of RS Sailing. Not all dealers possess a shop where they sell parts and accessories, which is also not a requirement by RS Sailing. Nonetheless, by every global dealer is it possible to order parts and accessories directly as well as online via the parts website of RS Sailing (Geerling, 2017).

RS Sailing must use contemporary methods to monitor whether their dealers are on track of their targets or if RS Sailing must undertake action to support the dealers to be able to achieve their set target. As stated by JP: "So, the dealers know where they are against target." Also, complemented by MG: "A living inspirational tool to continuously improve the way we work with the dealers." In other words, RS Sailing as well as the global dealers itself know how they are performing and if they lay on track to achieve their targets.

As explained in the second paragraph of this section, all dealers have their contract with RS Sailing. None of the agreements, activities or targets dealers have is the same, so each dealer is different and cannot be compared equally. Due to this fact, every dealer must be taken into consideration individually in the Sales Balanced ScoreCard that will be transformed into a dashboard.

Dealers add value to the brand RS Sailing by promoting the brand on a local level. Promotional activities done by the dealers are various kind of sailing events, demos, sail demonstrations and boat shows. This contribution outlines the importance of the dealer network of RS Sailing as the dealers play a prominent role in recognition of RS Sailing worldwide. This can only be done on such a scale and level by having a local contact point in the area where the business wants to dominate.

4.5. Critical Success Factors

In a follow-up to the qualitative research, the researcher supplemented the information gap of the research by applying desk research as presented in the third chapter 'research design'. Helpful information, regarding the formulation of CSFs and KPIs, has been collected and the later implementation and retention of the dashboard.

Firstly, the CSFs are crucial and provide success on short- and long-term. The CSFs compose the core drivers of the company, of which RS Sailing has towards its global dealers, tangible (Marr, 2015). Also, it visualises the essential factors of the business, which the company has with the dealers. (Nuhaan & den Dunnen, 2000) Therefore, CSFs derive from the unique and success factors that the company possess, prolong the strategy, vision and missions (core drivers) of RS Sailing. The Sales Balanced ScoreCard is the guidance in formulating the CSFs. One CSF will be assigned to every perspective in reference to the business, which comes down to four CSFs as the Sales Balanced ScoreCard consist of four perspectives.

4.6. Key Performance Indicators

Following the CSFs, the KPIs have to be determined. The KPIs are performance indicators made concrete and measurable in extension to the CSFs, which form the objectives the company has stated. Therefore, the objectives the company aims to meet must be the guideline in formulating the KPIs. The company strategy and objectives are linked to each other and must be merged. Measuring operational objectives will lead to real-time measurement, which will keep the business up-to-date on the current ongoing activities in comparison with the past faced towards the future. (Marr, 2015)

Next, the quantity of KPIs is worth taking into consideration. Although the amount cannot be determined before formulating them, KPIs should have a particular purpose and input. If not, the indicator should not be implemented as an indicator in the dashboard. "It's important not to have too many KPIs as this dilutes focus for your business on the actions that are going to drive success (Marr, 2015, p. 23)." Due to these facts, the researcher has decided to formulate three to five KPIs per CSFs. Herewith, the researcher aims to stick to useful indicators as well as to keep the dashboard maintainable.

Indicators will be both tangible as intangible. However, most will be tangible as these are numbers and volumes of actions to be measured that will provide the highest available real-time opportunities. Therefore, intangible indicators will be used as little as possible, but must be applied to desired actions to be measured. Hence, these intangible indicators will not be supplied on a real-time basis. (Marr, 2015, p. 23)

4.7. Past and future

The CSFs can be optimised by paying attention to future as well as to past results. Current performance results do not show where the outcomes came from or might lead to. By knowing what activities have took place prior to the results, the outcomes provide more context. (Nuhaan & den Dunnen, 2017)

Moreover, the results might be either instructive, which means; something should be improved, or could be motivating in the way they are performing. "Your financial performance or your sales performance today is an outcome of having done certain things in the past (Marr, 2015, p. 23)." In other words, having a comparison of these numbers can show whether they are on the right track or if there is room for refinement.

4.8. IST-SOLL situation

The current situation (the so-called 'IST-situation' (Ben & Wil, 2017)) is as follows; currently, RS Sailing is not able to make decisions upon reliable data because they do not possess this information. Therefore, the business makes decisions, which are not made on rational grounds.

What RS Sailing desires to obtain in future (the so-called 'SOLL-situation' (Ben & Wil, 2017)) is as follows; RS Sailing aims to possess a dashboard that gives them insight into the performance of their global dealers, which makes the business able to make decisions upon rational grounds. Moreover, this tool should support the business in guiding their dealers as well as supplying the dealers with performance data based on facts.

4.9. Targets

Determining tailored targets per KPI can enhance the efficiency of every KPI. Besides, adding a target provides the KPI with more context. Also, it draws attention to the current position in comparison to where the company wants to be (Marr, 2015, p. 24). Accordingly, the target should either be set as 'absolute[1]' or as 'proportional/ percentage[2]'.

To complement the previously given information, some tips will follow that apply on this project in formulating appropriate targets for the KPI brought in by 'Bernard Marr' (Marr, 2015, p. 26):

> "Use existing and relevant information to review trends and history.
> Where appropriate, consider seasonal or other variations in performance.
> If applicable, take national targets, best practice benchmarks into account.
> Take the cause and effect relationships in the business into account.
> Remember to take time lags into account."

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[1] "Absolute target: such as 'increase by seven' (Marr B. , 2015)."

[2] "Proportional/ percentage: such as 'increase by 4%' (Marr B. , 2015)."

5. Discussion

This chapter includes a reflection on the applied method executed by the researcher. The reliability of these results will be discussed as well as the saturation point that has been reached during the research process.

The researcher has experienced the Sales Balanced ScoreCard as a valuable tool towards the development of a dashboard. Although working towards the implementation of a dashboard is time-consuming, the steps where this tool runs through turns the process into a manageable project as far as possible.

The intention to perform quantitative research is afterwards seen as unnecessary. A massive amount of information has been gathered with the conduction of qualitative research. Since the interviewees have taken their time to supply information and cover the requested topics, the researcher was able to cover the first three sub-questions, which shows the significance of conducting the interviews and the input of the interviewees.

In consideration of the obtained data, which has been collected in the section 'qualitative research', the researcher has analysed the most important dimensions of the interviews. The two dimensions 'Uniqueness' and 'Success factors' are merged to obtain the main CSFs given in by the employees of the business. The following two statements summarises the unique and success factors of RS Sailing;

> "We are the only manufacturer of small sailing boats that are servicing all segments from clubs and schools to racing classes and from leisure sailors to institutional buyers with product that really suit them." **MG**

> "The events are key for how successful the brand is. But also, the class association, the RS Sailing community; which are groups of sailors and friends, club sailing. The products are good and our general marketing is overall pretty strong. The name "RS Sailing" is quite cool. Also, the branding is good." **RK**

From the above statements, the importance of the collaboration RS Sailing has with its dealers can be assumed. Also, the mentioned business actions cannot be realised without cooperation of their dealers all around the globe.

In succession to the CSFs, the researcher overhauled the obtained information in the analysis of the research directed to the KPIs of the company. The formulation of the KPIs are characterised by the dimension 'Objectives'.

> "From a tangible perspective are our objectives very simple: Sell more boats (creating a profitable business), serving need of Shareholders and creating a sustainable business model." **RH**

> "We need to make profit and generate cash. The most important thing is to keep the business profitable. The bottom-line is to survive, otherwise it is all pointless." **JP**

To conclude, RS Sailing aims to increase their sales and maintain to be a profitable business whereby the dealers reach their targets. Which is why RS Sailing wishes to have a dashboard at its disposal.

5.1. Reliability

Due to the fact that the main data has been derived from employees of RS Sailing, it can be assumed that the reliability is of a high level. Knowledge has been brought in by trustworthy sources from inside the company. The workers have shown considerable awareness for significance and value of this project.

Subsequently, some adjustments have been made in the interview formats while preparing and formulating the final questions, because the researcher came across some additional information gaps. Therefore, the researcher decided to apply improvements. Also, questions have been left out as these appeared less relevant while preparing the individual interviews, as it became clear that not all questions were as significant to one interviewee as they may for instance be to another.

5.2. Saturation point

The saturation point has been reached, in which the researcher does not obtain new information and does not desire diversification in the data at a given moment during the research process. This happening occurred while composing the interviews and before actioning the questionnaires. Due to saturation of the desired information, the process of distributing questionnaires to the global dealers of RS Sailing, as explained in the third chapter 'research design', has been taken out. Although this action has not harmed the process in obtaining sufficient data, the dealers are taken less in consideration as expected on forehand by the researcher. Hence, RS Sailing should undertake steps in notifying their dealers, so that they are aware what is going to happen. However, the unknowingness of the dealers regarding the dashboard does not harm the current phase of the process.

6. Conclusions

The purpose of this research was to investigate how RS Sailing can track the performance of its global dealers. Moreover, this ability should lead in obtaining the set company objectives. Also, RS Sailing aims to maintain the dashboard that they are going to develop and implement after this research. However, research was required to obtain a clear view in what way RS Sailing should obtain this. In brief, the problem statement for this research is as follows; "RS Sailing does not have a structured approach towards the commercial business results they are seeking for in tracking the performance of its global dealers." RS Sailing has asked the researcher to investigate these issues and make the initial steps towards the development of a dashboard.

This penultimate chapter presents the conclusions of this research by guidance of each sub-question. Lastly, the main research findings will be linked to the problem statement. In other words, the results of the sub-questions answer the main question underneath, which will result in accurate interpretations for RS Sailing.

6.1. Sub-question 1
What is the relation between the strategy and the objectives of RS Sailing and the activities of the global dealers?

The results derived from the qualitative research gave the researcher the possibility to draw conclusions. The strategy and the objectives of RS Sailing are closely linked to the activities of the global dealers in many ways. Besides making money (which is essential), one of the main drivers of RS Sailing is the passion for the sailing sport.

First and foremost, the strategy of RS Sailing entails being and maintaining the largest global recognised leading small boat brand profitably. Next, RS Sailing strives to obtain this by growing the business by investing in the accessibility of the sailing sport, creating attractive communities and support clubs and school by spreading their passion. Besides, creating innovative and good value products, the company creates a solid global dealer network as well as a solid relationship with its customers.

Secondly, the main objectives of RS Sailing involve being a profitable business that reaches its set targets, increases sales, and spread their passion for the sailing sport.

Thirdly, dealers add value to RS Sailing by carrying out promotional activities to increase brand awareness and strive for increased sales.

In conclusion, the strategy, and objectives by RS Sailing in growing a sustainable business are related to the business activities. The company focuses on being profitable and reaches its set targets in addition to spreading a passion for sailing. Dealers add value to the brand RS Sailing by its commitment in promotional activities on a local scale, which makes it possible for RS Sailing to retain its brand all over the world.

6.2. Sub-question 2
'What factors are critical to the achievement of the objectives?'

In reference to the dimensions 'Uniqueness' and 'Success factors', that have been analysed from the interview scripts, the researcher has come to a number of CSF's. The CSFs of RS Sailing are guided by the four perspectives of the Sales Balanced ScoreCard.
Along with the four perspectives of Sales Balanced ScoreCard have four CSFs be formulated as follows;

Internal Business Process
RS Team
The RS Sailing team, consisting of workers that are operating from the head office at RS Sailing, is collaborating with their global dealers. This dealership made it possible to extend into a global brand and obtain new customers as well as retain customers. Data information from the dealers is important to the Customer Relationship Management of RS Sailing. Therefore, the data must be unravelled and translated into a readable overview per dealer.

Learning and Growth
RS Brand awareness
The brand awareness of RS Sailing is pivotal to the business. In knowing what activities elevate brand awareness, the company is able to interact and support its dealers. Therefore, RS Sailing must track what the results are in turn for the actions done by its dealers.

Distributors
RS Dealers
The distribution network of RS Sailing, in other words the global dealers, are key to the existence of the business. The dealers are essential to obtain as well as retain customers, which they do by performing promotional activities. When measuring these actions performed by the dealers, the guidance by RS Sailing will improve as well as the understanding why dealers are performing positively or negatively.

Financial
RS Boat sales
RS Sailing strives to become a bigger small boat brand by enhancing the performance of its dealers and increasing sales. By measuring the effectiveness of boat sales per dealer, RS Sailing is able to make assumptions and steer them upon the results.

6.3. Sub-question 3
'Can these objectives and CSFs be translated into KPIs?'

The performance indicators are made concrete and measurable to the CSFs, which form the strategy and objectives that the company aspires. Therefore, formulating the KPIs has been characterised by the dimension 'Objectives', that has been analysed from the interview scripts. An overview of the proposed CSF's and KPIs can be found in appendix 5.

Team

Zoho CRM

✓ Total number new leads vs target
✓ % of new customers' vs target

Brand awareness

Direct mail

✓ Total number of Direct Mails performed vs. planned
✓ % of total mailing list that opened e-mail
✓ % of click throughs to the website via the Direct Mailing Campaign

Website traffic

✓ Total % of growth vs decline in visitors
✓ Total % of growth vs decline in page views
✓ Engagement number per age and gender
✓ Average spend time in minutes' vs target
✓ Conversion rate number of visitors' vs new leads

Social Media (Facebook)

✓ *Total posts vs target*
✓ *Total referrals vs target*
✓ % growth on natural likes on page
✓ *Total comments*
✓ *Total page views*

Dealers

Promotion activities (sail events, demos and boat shows)

✓ Total planned sail events vs target
✓ Total achieved sail events vs planned
✓ Total 'open' sail events vs planned

Boat sales

Performance per dealer

✓ Total sales per quarter vs target
✓ Total sales vs total sales same date prior year
✓ Total delivered vs sold
✓ % parts sales vs total sales

The above stated KPIs are aimed to inform the business whether their dealers are on the right track or if guidance is required. In other words, indicators that signal changes, which can be positive as well as negative, within their performance. These KPIs supplies the manager with an overview of the performed activities and its results, which makes it

suitable to make decisions upon this data and undertake actions upon these results when needed. Moreover, this data provides the global dealers also with an overview of results they have been working on. Also, it informs them how far they have come in achieving the set targets and where they should focus more upon.

6.4. Sub-question 4
'How will the CSFs and KPIs be translated into a readable dashboard for both management and dealers?'

The presented CSFs and KPIs in this research must first be revised by the European Business Development Manager in cooperation with the financial controller of RS Sailing, before setting the measurable variables in stone. These two workers are able to revise the indicators by applying their experiences and knowledge. In obtaining a clear overview of all the indicators RS Sailing should observe the maximum of five KPIs per CSFs. Also, most of the indicators should be tangible in having the overhand of the data desired for the dashboard.

Additionally, targets must be set on various KPIs after they are made concrete and definitive, which will add value to data that is derived from the dashboard after implementation. Furthermore, the efficiency of every KPI will be enhanced by setting targets. This action will provide every indicator with more context and pays attention to the current position in comparison to where the company wants to be. Additionally, this will follow in guiding the dealers on a different level.

The completion of the Sales Balanced ScoreCard will be reached when RS Sailing has covered all the stipulated steps in obtaining personalised CFSs and KPIs. Shifting the Sales Balanced ScoreCard into a dashboard is the next step. The completed Sales Balanced ScoreCard can be transferred into a customised RS Sailing dashboard. The dashboard will be readable and understandable for RS Sailing as it is developed by RS Sailing itself. After the introduction of the dashboard directed to the dealers has taken place, it is expected that the dealers will need some extra guidance and support in using the dashboard.

6.5. Sub-question 5
'How will this dashboard be implemented and maintained to be valuable for the business?'

At the time the dashboard is developed, it is envisioned that some significant factors will require close attention in order to bring it to a successful business tool. Afterwards, RS Sailing is ready to introduce the dashboard to its global dealers. Next, the KPIs and targets included in the dashboard must be monitored. After a while it will become clear if the dashboard reveals the desired information. After analysing the primary results, it is up to RS Sailing to decide whether the results are satisfying or whether the KPIs need any adjustment.

Continuous monitoring and analysing of the dashboard is significant to keep the value of the dashboard at a great level. As the business changes over time, it is likewise necessary for the dashboard to optimise the current trends and developments in time. After the dashboard has been used for a longer period by the management and the dealers will the user

friendliness increase. People will get more confident in using the dashboard and get to understand the tool. It is desired that the users of the dashboard will experience the success of the dashboard.

In regard to the company culture of RS Sailing, the implementation phase should be kept as simple as possible. This would enhance the probability of maintaining the dashboard as well as effective use.

6.6. Research question
Based on the findings presented in this report will the researcher answer the stated research question:

"In what way should RS Sailing track the progress of their global dealers in order to achieve the set company objectives and maintain these in future perspective?"

Regarding the outcomes of this research it became clear that the CSFs and the KPIs are fundamental in developing a management dashboard. The CSFs demonstrate the success of the business in sequence of its mission, vision and strategy. By adding a number of measurable KPIs to every CSF will the core drivers together with the company objectives be translated into readable outcomes.
Although this research supplies four CSFs factors along with maximum five KPIs, the company must revise every measurable variable itself by applying their knowledge and experiences.

First of all, RS Sailing must revise the presented CSFs and KPIs that have been derived from the process in applying the Sales Balanced ScoreCard from this research. It is crucial for RS Sailing to set the CSFs and KPIs in stone prior to the development of the actual dashboard.

Secondly, the business should transform the accomplished Sales Balanced ScoreCard into a dashboard. A tailored dashboard commercial orientated by RS Sailing directed to its global dealers.

Thirdly, the company should implement the developed dashboard based on measurable indicators set in stone by themselves.
So, these steps will support the business in assembling desired data from the global dealers.

Followed by the main goal of the project, with the implementation of the dashboard, RS Sailing is able to track the progress of the global dealers. This makes RS Sailing able to achieve its set company objectives.

Lastly, after the implementation of the dashboard, the maintainability is expected to be a challenge for RS Sailing. Due to this, a clear work approach is desired to make it user-friendly for the business.

7. Recommendations

The final chapter of this research entails recommendations for further actions. Firstly, further development in cooperation with the Sales Balanced ScoreCard will be explained to launch the desired dashboard, followed by the implementation. Secondly, the researcher suggests setting targets to enhance the value of the dashboard. Thirdly, further actions are required to obtain sufficient knowledge as to how to maintain the dashboard.

7.1. Recommendation 1

The first step would be to carry out the process accompanied with the Sales Balanced ScoreCard. RS Sailing must revise the proposed indicators in this report and establish the final CSFs and KPIs that will be implemented in the dashboard. Further actions by RS Sailing itself on the CSFs composed of various KPIs is highly recommended by the researcher to obtain the maximum benefit from the dashboard. The manager should be involved in this process as also stated in the book; 'Een beter verkoopresultaat met de Sales-Balanced ScoreCard (Nuhaan & den Dunnen, 2000). Moreover, it is advised to carry out this step together with the financial controller of the business, as he is able to share his knowledge and make the measurable variables realistic in the execution process.

Once the relationship between CSFs and KPIs are irrevocable and the Sales Balanced ScoreCard is complete, this will lead to useful data. This is the moment when RS Sailing is ready to implement their tailored dashboard successfully.

7.2. Recommendation 2

Setting targets will enhance the value of the dashboard and might increase the motivation and drive of the dealers. Furthermore, this will help to support and steer the performance of the dealers by RS Sailing.

The targets that are set at the beginning must be revised at a later date to optimise the measurement of the performance indicators. After a while of monitoring the dashboard, the company moves on and might either change its strategy or trends in the branch, which forces the company to interact on these occurrences.

Also, the presented KPIs are stated as 'total', but these could be given in an amount or percentage. This will depend on the way it will be presented on the dashboard, which might be in a variety of charts; line, column, bar, pie, radar etc. Connecting a target to each KPI is strongly advised. Determining tailored targets per KPI will enhance the efficiency of the dashboard.

Accordingly, the target should be set either as 'absolute' or as 'proportional/ percentage' (Marr, 2015, p. 24). This action will enhance the value of the KPI and turns it into context of where the company currently is in comparison to where it wants to be.

7.3. Recommendation 3

The last recommendation for RS Sailing comes down to the maintainability of the dashboard. It is strongly advised to appoint a worker that takes the development of the dashboard and data collection of the KPIs for his account. From the researchers' experiences within the company as well as those expressed in the interviews, Richard Kennedy would be the person most suitable for this role. He is the financial controller of RS Sailing and manages also the current financial dashboard that they have.

Employees who are actively in contact with the dealers should also be assigned to maintain the dashboard. As Michiel Geerling is responsible for the European dealers and Rikki Hooker for the American dealers, these two workers are most suitable. Michiel and Rikki should be the persons who distribute the dashboard information to their dealers.

In brief, RS Sailing should first of all complete the Sales Balanced ScoreCard, which means establishing the CSFs with its KPIs. Hereafter, the dashboard can be developed and implemented where after measuring the KPIs can be started.

Secondly, the researcher suggests setting targets to enhance the value of the dashboard. By assigning targets to each KPI, the measurable variable becomes genuinely useful. The target will add more context to the KPI, since it shows where the company currently is in comparison where it wants to be.

Thirdly, to make the dashboard valuable and maintainable in future perspectives, it is recommended to assign employees who are responsible for the development and maintainability of the dashboard.

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8.2. Table of figures

8.3. Table of tables

9. Appendices

9.1. Appendix 1: Interview design

Round	Interviewee	Interview topics	Interview questions
1	Riki Hooker Jon Partridge Michiel Geerling	1. Strategy	What is the strategy of the company from your perspective?
		2. Company objectives	Which objectives does RS Sailing has concerning the global dealers?
			How do you aim to obtain these?
		3. Mission &Vision	Could you give your personal opinion on the mission and vision of RS Sailing?
		3.1. In regard to the mission	What does 'world-class sailboat brand' mean to you?
			What does 'premium parts supply' mean to you?
			What does 'redefining the sport of sailing' mean to you?
		3.2. In regard to the vision	How does RS Sailing obtain innovation?
			How does RS Sailing translate 'creating friends for life'? How do you obtain this?
			How would you clarify 'on a global scale'?
		4. Indicators	What is your opinion on the presented possible indicators for the dashboard?
			What would you prefer to leave out and what would you add?
		5. Expectations	What are your expectations of the dealer dashboard?
			And what do you expect of this tool in future perspectives?
			What is for you key in tracking the progress of the global dealers?
			Is there anything you would like to add to this interview beneficially to the project/ dashboard?
2	Andy Taphouse		Could you explain your role within RS Sailing?
		1. Key objectives	What are your key objectives regarding your function and how are these linked to the main objectives of RS Sailing?
		2. CSF	What makes RS Sailing unique in what the company does?
			What are their success factors?
		3. Dashboard	Are you interested in more data analysis and why?
			What data will this be?
			What do you do to increase parts and accessories?
			Do you measure the effectiveness of the actions you do?

				Is there a rule of thumb on the shares of parts and accessories in comparison to the total sales of a dealer?
				Could these be translated into targets for the dealers?
			4. Indicators	What is your opinion on the presented possible indicators for the dashboard?
				What are for you essential indicators to track the dealers on?
				What would you like to see in addition to these indicators?
			5. Expectations	What is for you key in tracking the progress of the global dealers?
				What are your expectations of the dealer dashboard?
				Is there anything you would like to add to this interview beneficially to the project/ dashboard?
3	Steve Dean			Could you explain your role within RS Sailing?
			1. Key objectives	What are your key objectives regarding your function and how are these linked to the main objectives of RS Sailing?
			2. CSF	What makes RS Sailing unique in what the company does?
				What are their success factors?
				What do you do in regard to the international RS Sailing community?
				How do you obtain brand awareness?
			3. Dashboard	Do you measure the effectiveness of the actions you do?
				Are you satisfied with the current performance?
			4. Indicators	What is your opinion on the presented possible indicators for the dashboard?
				What are for you essential indicators to track the dealers on?
			5. Expectations	What are your expectations of the dealer dashboard?
				What is for you key in tracking the progress of the global dealers?
				Is there anything you would like to add to this interview beneficially to the project/ dashboard?
4	Richard Kennedy			Could you explain your role within RS Sailing?
			1. Key objectives	What are your key objectives regarding your function and how are these linked to the main objectives of RS Sailing?

		2.	CSF	What makes RS Sailing unique in what the company does?
				What are their success factors?
		3.	Dashboard	Could you give me a brief introduction on the current management dashboard of RS Sailing?
				What was the main reason to develop this dashboard?
				What do you think of the effectiveness of that dashboard?
		4.	indicators	What is your opinion on the presented possible indicators for the dashboard?
				What would you like to see in addition to these indicators?
		5.	Expectations	What are your expectations of the dealer dashboard?
				What is for you key in tracking the progress of the global dealers?
				Is there anything you would like to add to this interview beneficially to the project/ dashboard?
5	Richard Frost			Could you explain your role within RS Sailing?
		1.	Key objectives	What are your key objectives regarding your function and how are these linked to the main objectives of RS Sailing?
		2.	CSF	What makes RS Sailing unique in what the company does?
				What are their success factors?
		3.	Dashboard	Can you explain how the sales planning and the operations planning come together?
				In what way could dealers help the operations team to run smoother?
				What would help RS Sailing to create the ideal environment taking the following three figures into account; Flexibility versus accuracy versus cost management
				Do you measure the effectiveness of the actions you do?
				When you look at the mentioned things you currently measure, are you satisfied with the current performance of RS Sailing?
		4.	Indicators	What do you think of the presented indicators in the presentation?

		What is your opinion on the presented possible indicators for the dashboard?
		What are for you essential indicators to track the dealers on?
		What are your expectations of the dealer dashboard?
5.	Expectations	What is for you key in tracking the progress of the global dealers?
		Is there anything you would like to add to this interview beneficially to the project/ dashboard?

Interviewees

Next, the following tables are including additional information of the seven employees of RS Sailing, who will be interviewed.

Interviewee	Riki Hooker
Gender	Male
Position	International Sales Director
Date	25th of April 2017
Time	11.00 am
Location	Meeting room at the head office Romsey

Interviewee	Jon Partridge
Gender	Male
Position	Managing commercial Director
Date	25th of April 2017
Time	2.00 pm
Location	Meeting room at the head office Romsey

Interviewee	Michiel Geerling
Gender	Male
Position	European Business Development
Date	25th of April 2017
Time	4.00 pm
Location	Meeting room at the head office Romsey

Interviewee	Steve Dean
Gender	Male
Position	Training & Fleet sales manager
Date	26th of April 2017
Time	10.00 am
Location	Meeting room at the head office Romsey

Interviewee	Andy Taphouse
Gender	Male
Position	Sales manager RS Sailing store
Date	26th of April 2017
Time	14.00 pm
Location	Marketing office

Interviewee	Richard Kennedy
Gender	Male
Position	Financial Controller
Date	27th of April 2017
Time	14.00 pm
Location	Meeting room

Interviewee	Richard Frost
Gender	Male
Position	Operational Manager
Date	28th of April 2017
Time	10.00
Location	Meeting room at the head office Romsey

Interview invitations

The following email setup has been used to send out to the employees of RS Sailing, who are requested to cooperate in this research by being interviewed.

Dear all,

Via this email, I would like to give you a brief introduction on the research project I am working on for RS Sailing. Also, I would like to inform you about the upcoming actions I would like to undertake beneficially to this project.

To be able to cover all the essential internal data I would like to conduct some individual interviews. To achieve this, I would like to ask some of your precious time.

Attached you can find a PowerPoint, which should give you a first impression. This presentation will also be presented during a meeting previously to the interview. I will come by to plan an individual interview from tomorrow on.

Thank you in advance for your cooperation.

Kind regards,

Janneke Kriekaard

RS Sailing – Commercial Intern

Interview Introduction

The following composed script shows an introduction for the interviews, which is welcoming and instructive:

"Welcome to this interview!

In the first place, thank you for your time and your cooperation in this research project by being present at this convention. Also, you input in during the interview is of high importance for the results of this project.

I would like to ask you kindly for your permission to record this interview in order to be sure of not missing out on information that you are about to give during this interview? This interview entails a maximum of 10 questions and will confiscate maximum 30 minutes of your time.

Let's get started."

Information sheet
The following information has been supplied to the interviewees during the interview in order to let them visualise questions easier.

The mission & vision of RS Sailing

Our Mission
"RS Sailing is a <u>world-class sailboat brand</u> with <u>premium parts supply</u>, <u>redefining the sport of sailing</u>"

Our Vision
"Sailing should be available for everyone, uncomplicated enjoyment, with exciting <u>innovative</u> products, <u>creating friends for life</u> while having <u>fun</u> <u>on a global scale</u>"

Objectives
- Growing our sport
- Redefining the sport of sailing
- Creating communities
- Innovation
- Global reach
- Sharing our passion
- Creating new business models for our customers

Dashboard indicators
- Boats sales
- CRM contacts (Zoho)
- Direct mailing
- Social media tools
- Websites RS Sailing

Sub-questions	Concept	Variables	Search scope	Source (book)
3.Can these objectives and CSFs be translated into KPIs?	**Performance measurement**	'Ontwikkelings- en implementatieproces'	Chapter 8	Een beter verkoopresultaat met de Sales-Balenced Scorebard (Nuhaan & den Dunnen, 2000)
		'Creating the right set of KPIs'	Chapter 2, 3	Key performance indicators (Marr, 2015)
4.How will the CSFs and KPIs be translated into a readable dashboard for both management and dealers?	**Performance measurement**	'Setting the right targets for you KPIs' 'Implementing the key components of fact-based management' 'Introducing the Sales Balanced ScoreCard' 'developing a KPI'	Chapter 2, 3, 4, 5	Key performance indicators (Marr, 2015)
5.How will this dashboard be implemented and maintained to be valuable for the business?	**Operation procedure**	'Succesfactoren bij implementatie'	Chapter 8	Een beter verkoopresultaat met de Sales-Balenced Scorebard (Nuhaan & den Dunnen, 2000)
		'Turning KPIs into into insights' 'reporting and communicating KPIs effectively'	Chapter 6	Key performance indicators (Marr, 2015)

Sub-question	Concept	Dimension	Variables	Method	Interview question
1.What is the relation between the strategy and the objectives of RS Sailing and the activities of the global dealers?	**Core drivers RS Sailing**	Strategy	-Company strategy	-Theoretical framework -Semi-structured interviews	What is the strategy of the company from your perspective?
		Mission	-RS Sailing mission -'world-class sailboat brand'		What does 'world-class sailboat brand' mean to you?
			-RS Sailing mission -'premium parts supply'		What does 'premium parts supply' mean to you?
			-RS Sailing mission Sailing -'redefining the sport of sailing'		What does 'redefining the sport of sailing' mean to you?
		Vision	-RS Sailing vision -Innovation		How does RS Sailing obtain innovation?
			-RS Sailing vision -Community -'creating friends for life'		How does RS Sailing translate 'creating friends for life'? How do you obtain this?
			-RS Sailing vision -'on a global scale'		How would you clarify 'on a global scale'?
	Internal business process	Objectives	-Company objectives -Global dealers	-Theoretical framework -Semi-structured interviews	Which objectives does RS Sailing has concerning the global dealers?
		Achievement	-Aims -Reachability		How do you aim to obtain the objectives?
		Function objectives	-Accessibility -Individual		What are your key objectives regarding

					your function and how are these linked to the main objectives of RS Sailing?
		Uniqueness	- Company singularity -Diversity		What makes RS Sailing unique in what the company does?
2. What factors are critical to the achievement of the objectives?	**Learning and growth**	Internal evaluation	-Evaluating -Internal business process	-Semi-structured interviews	What is your opinion on the presented possible indicators for the dashboard?
		Adaption	-Sufficiency		What would you prefer to leave out and what would you add? What do you think of a fixed measure moment?
		Indicators	-Position related		What are for you essential indicators to track the dealers on?
		Success factors	-Successful		What are their success factors?
3.Can these objectives and CSFs be translated into KPIs?	**Performance measurement**	Critical Success Factors	-Internal environment -Internal factors	Theoretical framework -Desk research (Nuhaan & den Dunnen, 2000)	
4.How will the CSFs and KPIs be translated into a readable dashboard for both management and dealers?	**Performance measurement**	Key Performance Indicators	-Critical Success Factors -Performance -Key factors -Global dealers	Theoretical framework -Desk research (Marr, 2015)	
5.How will this dashboard be implemented and maintained to be valuable for the business?	**Operation procedure**	Dashboard	Sales Balanced ScoreCard - Maintain-able -Implemen-tation	-Desk research (Nuhaan & den Dunnen, 2000) (Kaplan, 2017) (Marr, 2015)	

9.4. Appendix 4: Qualitative research

The following interviews are colour coded by the coding legend underneath.

Colour code	Term
Core drivers RS Sailing	
	Strategy
	Mission
	Vision
Internal Business Process	
	Objectives
	Achievement
	Function objectives
	Uniqueness
Learning and Growth	
	Internal evaluation
	Adaption
	Indicators
	Success factors

Table 3 Colour coding legend; interviews

Round 1	❑ Strategy ❑ Mission & vision ❑ Company objectives ❑ Indicators	**Riki Hooker** *Jon Partridge* *Michiel Geerling*

1. What is the strategy of the company from your perspective?

"Our over watching strategy is to become and to maintain being the world's largest and foremost smart sailboat manufacturer. We want to become household main in small boats and continue the path of doing that. We want to build the largest, strongest and most robust international distribution network for those boats."

1.1. How do you aim to obtain these?

Maintaining a valid and current connection with the market around the world. Not reacting, but proactively shaping the sport to our products. Because that is what sets us apart as a world class; defining the market.

2. Could you give your personal opinion on the mission and vision of RS Sailing?

The vision statement; I do like this. The actions and commitment are linked to the vision and mission. But the mission could be trimmed down I think. We could take a few words out.

Getting the mission statement down to one sentence: 'To build the world class sailing sailboat brand.'

Vision by Riki

"We would like to continually innovate the sport sailing through grow the sport through clever product development. And a community that uses the boats, so all the things that go alongside the community. In terms of racing, dealer network, events and participation."

2.1. In regards to the mission:
What does 'world-class sailboat brand' mean to you?

Because I think, being the world class sailing sailboat brand means that premium sell parts supply is parts and parts in the fact, it needs to be stated separately.
That is just one of the facets of being a world class sailboat brand.

2.2. What does 'premium parts supply' mean to you?

We wrote that at the time that we were helping on driving forwards our parts supply. Because it was almost the weakest leak in the chain.
And we were great at developing new boats, building new boats, finding exiting characters to work with around the world who would be partners to selling these boats. And where we seem to fall done was in maintaining those boats on the water, because of the international challenges, team or infrastructure.

2.3. What does 'redefining the sport of sailing' mean to you?

Modernising and innovating products and waist of participate.

It's about the way the boats are used. How are they utilising that time and money, has nothing to do with the product but with the use. That is redefining the boat, moving forward by innovating.

2.4. In regards to the vision:
How does RS Sailing obtain innovation?

It is in the product design, material and roots participation. The entire product development with its latest manufacturing technics (innovations).

What we make and how we make it. i.e. halving the weight of the RS Aero; making it lighter.

2.5. How does RS Sailing translate creating friends for life? How do you obtain this?

All surrounding the community of ownership. Associating yourself with like minded people with common interest makes creating friendships easier. People look for communality.

A community through ownership or participation, you make friends a product of that.

3. What is your opinion on the presented objectives and could you describe them in your own words?
- Growing our sport; Continuing the growth in the sailing sport

Work, activity and product that delivers new sailors and livelong sailors (somebody that considers themselves as a sailor when you ask them what their sport is) those are the people who give a lifetime in sport and in RS. So yes, growing the sport is the products and the associated activity. Building a root to become a sailor for life, community, racing; that is growing the sport while being involved. The international industry level that grow our sport.

- Redefining the sport of sailing
- Creating communities
- Innovation
- Global reach; Continues sustainable growth in export market.

It is more about the people, not about how much dealers you for instance have. Focus is on the person representing us by using the tools given by RS Sailing. And who is projecting our message through their own words, language and culture.

All 4 are activity to grow the sport. Because, us growing our business and growing new customers is part of global reach and growing our sport.

- Sharing our passion

I don't think that is an objective. You cannot automatically assume there is passion. Sharing our passion is a function of doing the job. The objective should be growing our business & community who have the passion.

3.1. Is there something you would like to add to these objectives?

The given objectives are the mission and visions, not the objectives of the company.

From a tangible perspective are our objectives very simple:
- Sell more boats →Creating profitable business
- Serving share holders
- Creating sustainable business model

These things underpin everything we are doing. I think objectives should be more literal.

I will read you the objectives we have stated for this year:

finance Control, maximising the introduction of the RS quest, Ongoing potential RS aero 'Do what we do better', Meet our targets and set ourselves up for 2018.

4. What is your opinion on the presented indicators for the dealer dashboard?

Boat sales; the past is a crucial indicator of performance, all the things you are doing are either success or not good. So, I think you should have prior year information.

Direct mail;

Downside: dealer has to give us the info > last deal

Organic;

Actions to grow database, grabbing data from website, Facebook

CRM

From my point of view are CRM and Zoho similar. Use CRM as one topic and skip Zoho.

All these topics can be under CRM.

4.1. What would you prefer to leave out and what would you add?

Combine CRM and Zoho; CRM as a topic, all the topics of both will fit underneath.

Add events; all the activities done by the dealers to promote RS Sailing. Any event that is selling and promoting boats; that's boat shows, going visit people, demo days, talks in clubs in the evening, webinar organising a regatta, lady's sailing event.

Events are crucial to the company. I think we should be encouraging our dealers to target what we do. That is what I do when I visit a dealer. Look! this is what you have sold, this is what we like you to sell you this year, this how you can help yourself at. At ask them the questions, how many questions have you got? How often do you contact them? What are you going to do this year, what are your activities?

So in regard to the dealer contract, as I go to the dealer and ask them what they are going to do upcoming year. They come up with their events they are planning to do and I include these in the dealer contract that we have setup with them. At the end of the year we are reviewing their goals. If they have had a shitty year, the first question will be; have you done all these events?

So the dashboard could help by this in setting the number of planned events (target), how many are performed and how many are still open.

But this has to be manually updated with the information given by the dealer. But where I am concerned about is that this information has to come from the dealers.

4.2. What do you think of a fixed measure moment of the performance of the dealers?

Well, if it is live, so if the data is fact, it could be real-time like financials (boat sales) direct mail, website, Social Media and CRM. The financial dashboard is updated five-times a day. So, there is no reason why that can't be real-time or frequently. It might mean that we must track some of those pages and find ways of doing that.

But is comes down how you are going to do it, you can ask the dealers to fill out a quarterly survey, in Zoho; mandatory to do the survey, to collect the information from the dealers. And then you are able to let BI collect the information from the survey. So that you can run a report that bi will display the information in CRM.

And if they haven't filled out the survey, it will show zero! So you know, it is up to them; zero is not good enough.

4.3. Would you for instance supply the dealers with the dashboard information once a month or a week or even once a year?

I think it will be monthly reports via email to each single dealer. Makes it informative and essential reports. So, they know how things happen and what they can do with it.
The other variables, that are difficult to track and need to be supplied by the dealer itself, might be quarterly.

5. What are your expectations of the dealer dashboard?

Well my expectations. I would like the dealer dashboard to be the focal centrepiece of any conversation any phone call, visit. So, I like it to be a tool kit to measure performance success or failure. It will completely shape the conversation.

So you can say; 'let's look at the indicators' the indicators where you can refer to. i.e. the figures of this boat are behind, how do you want us to help you in order to achieve it? Are you doing enough events?

5.1. And what do you expect of this tool in future perspectives?

I would like us to add to it, rather than it would decrease in its success overtime.

6. What is for you key in tracking the progress of the global dealers?

Most essential to me, I think, is boat sales by class, because everything else is part of the conversation that comes out of that information. It is all defined by selling boats and parts.

Actually, what I want to know: anyone given time, how many Aero's has one dealer sold against how many Aero's did we expect them to sell. The key features:
Dealers > boat sells by class> number sold > forecast

Those things need to define whatever is going on below (all the other indicators).

7. Is there anything you would like to add to this interview beneficially to the project/ dashboard?

Well, so add events as an indicator and minimise the information that we require them to give us. The more the dashboard can focus on given than of requiring them to give info is in my mind the key to success.

All of my concern of the dashboard is that all of this is stuff we need from the dealers, is information they have to supply us.

Because like I said, it is crucial that as much as the data as possible if being presented to them, is analytics of their performance. Rather than, tell us how you are getting on and will we make that look nice and give that back to you.

So, the use of Google is fine; Perfect and easy. Via google analytics we can get the information from our side. The same for Social media. But the grey area surrounding the number of leads and actions that is going to be tricky, they have to give us that data. So I think you need to think carefully how that is filled in.

9.4.2. Semi-structured interview 2; Jon Partridge

Round 1	❑ Strategy ❑ Mission & vision ❑ Company objectives ❑ Indicators	*Riki Hooker* **Jon Partridge** *Michiel Geerling*

1. What is the strategy of the company from your perspective?

Strategy by Jon

“To become the established and recognised world leading small boat brand and be profitable.”

1.1. Which objectives does RS Sailing has concerning the global dealers?

For them to represent our brand values of RS Sailing.

1.2. How do you aim to obtain these?

Through education support and working with the right people. And from my point of view, the right people are persons who have a passion for our values and the sailing sport.

2. Could you give your personal opinion on the mission and vision of RS Sailing?

I think that we wrote this probably two or three years ago, so we have probably moved on a bit. So the mission would be a little bit different now.   Redefined mission by Jon:

“RS sailing is a world recognised sail boat brand with world class business processes, so that the parts of the company work in a professional way which makes the company work in a cost-effective way.

2.1. In regard to the mission:
   What does 'world-class sailboat brand' mean to you?

World class is hard to define, so that is the reason why I would change it to world recognised; globally recognised.

To give you an example, we could be the best in the world, but if nobody knows that, it is pointless.

2.2. What does 'premium parts supply' mean to you?

Premium parts supply is only one aspect of all our business processes. From aftersales services, to parts supply, the way clients order a boat or we deal with our suppliers. All of these aspects needs to be premium from my point of view.

2.3. In regard to the vision:

I am happy with the vision how it is formulated as it is now.

2.4. How does RS Sailing obtain innovation?

With 'exiting innovative products' we mean modern products.

Basically, we need to invest in our Research & Development so our products are up to date and relevant for the current market.

2.5. **How does RS Sailing translate 'creating friends for life'? How do you obtain this?**
In one word; community! We hugely value the RS community.

2.6. **How would you clarify 'on a global scale'**
Roughly speaking, it applies to 50 active nations sailing in the world.
And then there is a bunch of tiny bits. So, we are focusing on those 50 active countries and the others are just too little, where there is no market in for us.

3. **What is your opinion on the presented objectives and could you describe them in your own words?**
   - Growing our sport
   - Redefining the sport of sailing
   - Creating communities
   - Innovation
   - Global reach
   - Sharing our passion

"These sounds all correct to me and I do believe in these."

   - Creating new business models for our customers

       Customer value proposition, customer loyalty Maintain and create uniqueness
"Yes, we are creating new business models for our customers through for instance; sales zone, and the way the purchases of sailboats could be funded in the future."

   3.1. Is there something you would like to add to these objectives?
"To remain profitable!
Some key goals, whether these are objectives or it is a different section, about the general business it that we need to make profit and generate cash. The most important thing is to keep the business profitable. The bottom-line is to survive, otherwise it is all pointless."

4. **What is your opinion on the current indicators for the dealer dashboard?**
"I have a good first impression on these indicators, it is all good what is in there."

   4.1. What would you prefer to leave out and what would you add?
"I would add one to it, which will be the indicator; events. So boat racing, demo sailing, demonstrations and social & fun. These are all slightly different, but there is a place for all of them.
Also, you could add the indicator weather.
I don't know how to find this information, but if the weather is better or worse than average in comparison with the previous years per it is hard to sell boats. Weathers plays a massive factor in what we do. Because when it is pouring of rain, we don't sell boats. If it is sunny, we do sell more boats."

   4.2. What do you think of a fixed moment to measure the performance of the dealers?
"I think it needs to be live data, real-time, otherwise it is pointless. Having reports which hm… it puts too much pressure on them.

They need to be able to have a look at this data any one moment in time they want and going; this is my target for the year, this is what I've sold, this is on order, this is where I'm at, these are my total leads. So, it needs to be live data for the dealers."

4.3. How frequently would you supply the dealers with the dashboard information?
"It needs to be weekly updated otherwise it would outdate too quickly. And in the worst case monthly when obtaining data from the dealers becomes a challenge for a specific indicator. Moreover, in an ideal world we find a way to integrate our systems. If we hosted their direct mail system, we would know."

5. What are your expectations of the dealer dashboard?
"So, the dealers know where they are against target.
Do you see what I mean? So, they know, my target is to sell 10 boats, and I sold 5 so they know they have to sell another 5 boats against their target. They know that their target was to do 15 direct mailings in a year and they have only done three so they know they have another 12 to do. So they always know where they at."

5.1. And what do you expect of this tool in future perspectives?
"It got to be more productive, otherwise there is no point of doing. So it needs to be the first port of call for the dealers reminding the things they need to do. And to stimulate and motivate them."

6. What is for you key in tracking the progress of the global dealers?
"Sells!
Ultimately, we sell boats. So, all these things good be perfect, but if they don't sell boats, then it's absolutely pointless. The focus got to be around selling boats and understanding what they are doing good or badly and if they are ahead or behind the set target."

7. Is there anything you would like to add to this interview beneficially to the project/ dashboard?
"I don't think so, no, it is all good."

Round 1	❑ Strategy ❑ Mission & vision ❑ Company objectives ❑ Indicators	*Riki Hooker* *Jon Partridge* **Michiel Geerling**

1. Could you explain your role within RS Sailing?

Commercial responsible for export business in Europe and partly Asia-Pacific and Africa. Commercial Business development, product and concept development and Marketing and Sales.

1.1. What are your key objectives regarding your function and how are these linked to the main objectives of RS Sailing?

My function objectives are the company objectives.

Making RS Sailing the recognised world leading small sailing boat brand by: Selling more (so grow the business), also being profitable and being relevant for the sport; develop the sport. Uh, and being a good business partner for our dealers.

2. What makes RS Sailing unique in what the company does?

We are the only manufacturer of small sailing boats that are servicing all segments from clubs and schools to racing classes and from leisure sailors to institutional buyers with product that really suit them. So, a wide and understandable product range. Strong brand with real followers, a real community.

3. What is the strategy of the company from your perspective?

We grow our company by investing in the following points:

- Accessibility of the sport (growing the sport)
- Creating communities which are attractive to be a part of.
- Supporting clubs and schools to run programs to educate people to sail.
- Creating smart, good and good value products.
- Creating new business models for our dealers and institutional buyers.
- Creating a global network of dealers, customers and other institutions that believe and share our passion.

4. What objectives does RS Sailing has concerning the global dealers?

First of all; Sales (boats per model). Next, Brand Awareness. You know, events, boat shows, demo-days, press releases, lobby with federations.

4.1. How do you aim to obtain these in regard to the dealer objectives?

Be a good and accessible partner for the dealers.

5. Could you give your personal opinion on the mission and vision of RS Sailing.
5.1. In regards to the mission:
What does 'world-class sailboat brand' mean to you?

That our brand is perceived similarly in every part of the world. This is about the perception of the stakeholders: Quality, atmosphere, mentality and accessibility.

5.2. What does 'premium parts supply' mean to you?

Availability. Speed of delivery and understandable product overviews.

5.3. What does 'redefining the sport of sailing' mean to you?

Well, we see that the concept of owning a boat like people owned boats 25 years ago has changed. Sharing costs and hassles, low maintenance and ease of handling become more and more important.

5.4. In regards to the vision:
How does RS Sailing obtain innovation?

Continuously innovating and launching concepts and new products. So, SailZone concept is an innovation that makes sailing and our brand better accessible. Also, new boats for the right purpose.

i.e. RS Quest is a simple and easy product but at the same time full of smart solutions.

5.5. How does RS Sailing translate creating friends for life? How do you obtain this?

Our products are bringing people together. The events that we support heavily are creating adventures that people share and by adding socials to the events people with the same interests become friends.

5.6. How would you clarify 'on a global scale'

Every country in the world and with a network that is accessible everywhere.

6. What is your opinion on the presented objectives and could you describe them in your own words?

Our main objective is to have a network of people all around the world loving our brand and sailing our boats. Creating great sailing experiences and social events around our products should lead to a further growing loyal customer base. This should result in a viable business.

7. What would you prefer to leave out and what would you add?

I would leave out weather. It is important factor but I don't want to give the dealers a 'reason to not perform'.

Website: In depth analyses on what is happening online. A lot of visits on the Germany CAT16 page? This means we need to advertise this boat more.

7.1. What do you think of a fixed moment to measure the performance of the dealers?

Yes there should be a fixed moment, uhh, I think every quarter would be good.

7.2. How frequently would you supply the dealers with the dashboard information?

Quarterly! Yes, every quarter.

8. What are your expectations of the dealer dashboard?

Inspirational tool for dealers.

8.1. And what do you expect of this tool in future perspectives?

A living tool to continuously improve the way we work with the dealers.

9. What is for you key in tracking the progress of the global dealers?

Activity tracking so dealers understand they need to perform actions as a result of the dashboard they receive.

10. Is there anything you would like to add to this interview beneficially to the project/ dashboard?

No!

9.4.4. Semi-structured interview 4; Andy Taphouse

Round 2	❑ Key objectives ❑ CSF ❑ Dashboard ❑ Indicators	Andy Taphouse

1. Could you explain your role within RS Sailing?

"Digital content; I am trying to bring as much stuff digitally, as much stuff manually digital of the functions or our business. So by using the website, internally and externally.

Ultimately, the aim is to get more users online, so using our resources online. But it isn't quite defined yet where it starts and stops since my position within the company has just changed from December on. Previously, I was parts manager.

The primary role is to get more online sales, so this is the next challenge to lead on to the global dealers. This is their challenge as well, but to get more people ordering online the less time we spend on processing orders."

1.1. What are your key objectives regarding your function and how are these linked to the main objectives of RS Sailing?

"Turnover obviously; turnover of the parts which turns over into company turnover. Parts offers, vital cash flow for the business, payments in no terms. Parts has quite a high proportion of the company profit, despite in not being the highest turnover department, I guess."

2. What makes RS Sailing unique in what the company does?

"The people and their passion. Adapt ability; the flexibility the team has of RS Sailing. Product can do the same, you know adjusting developing product that goes with that."

2.1. What are their success factors?

The success of RS Sailing is the customers and its community.

3. Are you interested in more data analysis and why?

"I think data analysis is very interesting. For example, the slide we have just discussed; you have to overlay how many boats sold in that country, how many boats are in that market, because I think that is significant to know. Obviously, in a new market you going to sell, you expect the part numbers to be really low, whereas in an established market you would expect it to be similar to our figures perhaps.

It makes the info you are looking at more relevant."

3.1. What data will this be?

"Data where I can work on, so analytics and from the website…

Well in the quest to try to improve web sales, is looking at the website where people leave the website and don't commit their exit page.

There is got to be a relevant between the amount of boats in a market base and spares sold in a market base. There got to be a ratio. I am sure the UK would set about ratio, which will then be interesting in other nations to look at. In understanding our numbers to make it easier to tell the story to other markets."

4. **What do you do to increase parts and accessories?**

"For the sales; improve the service; that has been the main of the game for four years to improve service. The markets is always getting bigger. But retaining customers on generic hardware is all done to service and knowledge.

Examples to obtain: staff. Examples like the drawings on the website, all add to that. It is all part of the service, it is all ease of use. "

4.1. Do you measure the effectiveness of the actions you do?

"No, well the only thing we look at is analytics, which is only based on the website. We look at growth, but we don't have a measure of what else we have done.
We could look at newsletters, what works and what doesn't. What interests people."

5. **Is there a rule of thumb on the shares of parts and accessories in comparison to the total sales of a dealer?**

"No, but again the UK market should be the benchmark for an established dingy market. And you can look at our data, our development over the years to see how that has changed. Because the parts and clothing becomes more and more a bigger and bigger contributor as the market develops."

5.1. Could these be translated into targets for the dealers?

"Yes, I think that is possible. I think there is a basic and simple percentage you can easily put into place. Based on the established classes sold in that country based on the boats they sell year on year."

6. **What do you think of the presented indicators?**

"From parts and clothing point of view, it is very difficult. The only thing we would pull out or use to dealers would be sharing them; how many people would come on our parts website, using google analytics and BI, to show how many of their customers are coming direct to us.

You could put a ratio between boats sold and parts bought, or something like this to look at."

6.1. What are for you essential indicators to track the dealers on?

"Firstly the website, I think at this point showing them that the business is there, and they are missing it and we are getting it is more important than saying you should sell 15% of your turnover in parts. Because I don't think this would work, at this point."

6.2. What would you like to see in addition to these indicators?

"I would like to see historic boat sales.
From a parts point of view, how big is their market, how many boat sales in that country or classes. And then you know the size of their market from a parts point of view.

Also, events might help that, because of participations.
To see how many active sailors, they have got in their country is probably a quite useful indicator. Participation; how many people are actively using their boats in the country, their customers can buy a boat but they can sit and do nothing."

7. What are your expectations of the dealer dashboard?

"Based on this, I would like to show them their potential. I would like to set a target, of what they should be doing. But being real; show them also what they potentially could be doing. Whenever they look at the dashboard they can see that there is more potential and there is a growth in spare parts."

8. What is for you key in tracking the progress of the global dealers?

"Seeing a percentage of their total sells in boats and spares. Seeing what percentages is boats and what is spares. Seeing if there is a trend."

9. Is there anything you would like to add to this interview beneficially to the project/ dashboard?

"I guess my only comment would be, establishing which of these countries are interested in selling spares and whether they just don't want to do it and want us to sell it direct. That is not really a measure, but it is interesting to know, because I don't think everyone want to sell spare parts. I think it is too difficult and that is why I think this whole area parts and clothes is quite tricky, quite a hard thing to measure. That is why I think it is all about sharing the potential in a dashboard of what they could do. And using us as the benchmark as a ratio, probably not as figures."

9.4.5. Semi-structured interview 5; Steve Dean

Round 3	❏ Key objectives ❏ CSF ❏ Dashboard ❏ Indicators	**Steve Dean**

1. Could you explain your role within RS Sailing?

"I look after the training and fleet sales, that is my prime role. So, selling boats within the UK (&wales). The whole training range. And I also do quite a large amount of marketing for RS as a whole. And I created and manage the RS training zone brand. Also, I do some development work with the new boats in the training range. So, part of my role is to identify the strengths and weaknesses of any of our products. And obviously selling the strengths"

1.1. What are your key objectives regarding your function and how are these linked to the main objectives of RS Sailing?

"My first objective is to hit target, so I have got a target for boat sales, year on year boat sales. Which is my primary target. Outside that, to continue the growth of the training zone and continue to create interactive videos on social media. For the last two years, it is growing massively. So, I'm trying to keep improving that and then raise the amount of hits we get on social media, YouTube. There is not a magic number we worked out."

2. What makes RS Sailing unique in what the company does?

"I would probably say the brand, because I think our brand is unique. In the fact that people see us being a bit more race orientated, a bit more of a dynamic brand, a social brand. And in the most part, not always the case, of the boats that we provide are we the best in the market."

2.1. What are their success factors?

"Quite difficult, because we haven't set measurable targets from a social media point of view, which we really should do.

In my role; sales, you know; at least hitting targets and hopefully growing is my main drive. Everything I do outside of this is passion projects which I do. My target is 1.7 million and the UK training and fleet counts for about 23% of the company's income, which is quite a lot."

3. What do you do in regard to the international RS Sailing community?

"Fairly pivotal in creating sail zone. So, that is the next bit project; developing and building sales zone, we are in phase one at the moment, taking it into phase two over this upcoming summer so we can properly lounge the project in the autumn of this year.

I've also been involved in an ambassador programs with Michiel in Europe. And through the training zone, because I'm the face of the training zone, I get a lot of interaction from people from all over the world, from dealers, customers. People come to me from a social media point of view, the majority I post on social media is worldwide orientated so international orientated, but some are UK relevant."

4. How do you obtain brand awareness?

"Probably, from face to face contact with our customers, will that be at boat shows or during the 3-month conference period I do. So, every weekend from January until last weekend, the end of March, I am at a conference during the weekend. Because each region

within the UK has their own conference. I go to everyone with a boat and talk to centres and stuff like that. So probably out of anyone in the company I am the person who actually talks to real people almost. Which is within the UK, outside the UK is through social media; Facebook, YouTube, Instagram, twitter, LinkedIn (no snapchat)."

5. Do you measure the effectiveness of the actions you do?
"On social media yes, I think we need to set targets to move forwards.
And about the conferences; I don't really have a spreadsheet of it. They just go into the general sales, it is and goes all together. So, in fact, I don't keep track of it, it is part of the things I do."

5.1. Are you satisfied with the current performance?
"Yes satisfied, we are talking about performance of boat sales global within training fleet, we are in a good place. Obviously, there are boats who do better than others, that's always going to be the way. The RS Quest is doing well internationally. Then there is boats which in the beginning decline. So, for instance the case with the RS Quba. But there are some new products coming online. The RS Aero still going strong. I think we can do better overseas, you know worldwide, in general. Because, some areas are doing really well, so you take the states they are doing really well, and then is some areas within Europe doing really well and some areas aren't doing so well.
It is about the people converting from being laser centric to being aero centric.
I think we are in a strong place and I personally would probably say we are getting closer and closer to Laser, which is being the leading manufacturer. I don't think we can say that now. But I don't know the exact numbers."

6. What do you think of the presented indicators?
"Let's say, obviously the boat sales and quarterly targets that's probably going to be the most important once. Measured by themselves, by the manager if you like. And from social media, the insights."

6.1. What are for you essential indicators to track the dealers on?
"Conversion of contacts into boat sales which you can do through the various different stages. So from the point they get emailed through the point they get processed on Zoho through contacts as to managing their leads. How much interaction they are having. Because the email shape will be attached to each persons lead name; if you got a lead in CRM every email they get send will be attached to their lead name. So, you can see all the email conversations. Having a look at the quotes, how they are laid out."

6.2. Is there anything you would like to see in addition to these indicators?
"What about visits, so imagine that I go to a sailing club and I take a boat along and just go and have a conversation with the manager of the club, you might already have had a telephone conversation with them, you go done to them and let some people to try the boat. So actually going to a sailing club or presenter. Dealers might go to a sailing club, let them try some boats, some face to face time. And whether that is a visit to the dealer or done by the dealer or somewhere else, is that measured? So what happened after that. Did you sell a boat, did you send a quote to them, did they come and not buy, why did they not buy?

Participation levels in the sport. Measuring the sports in itself, if it is growing or dropping of in cooperation with the federation."

7. What is for you key in tracking the progress of the global dealers?

"How many of their customers, from a training/ clubs point of view, are registered on sail zone website. And if they are registered, at what level of information are they uploaded. And how they are using the sales zone name how they are advertising the sails zone product? it shows how involved the distributer is, so they can be good in just selling boats but if they are using sail zone and getting involved in the project. Then they are really embracing the community in the product."

8. What are your expectations of the dealer dashboard?

"The expectations to give the dealers a clear indication of where they are in any time of the year. That they can track the work of what they have done but also look ahead, a plan for the future. Seeing where they are winning and where they are losing. In regard to the particular boats they are selling. So, they can refocus their time and energy, either just working on the boats that are really selling and just selling them or working on the boats that are not selling so well."

9. Is there anything you would like to add to this interview beneficially to the project/ dashboard?

"In regard to sail zone and social media, going to be really keen for expending the global reach, with actually having the feet on the ground.

They get to know the brand and the information without actually going there. And we can share our passion via social media."

Round 4	❏ Key objectives ❏ CSF ❏ Dashboard ❏ Indicators	**Richard Kennedy**

1. Could you explain your role within RS Sailing?

"I prepare the finances, I manage cash flow, profitability, general overview of sales and overheads as well as a general overview on stock control and forecasting."

1.1. What are your key objectives regarding your function and how are these linked to the main objectives of RS Sailing?

"The objective for me is to get good accounting information out to the shareholders. Ensuring if our margin & stock is accurate. So, we can make good decisions with the data, that is problem one of the main once.

The main objective of RS Sailing is to sell as much to a wider audience as possible.

So with what you are talking about for example dashboards and so providing sales information which would tell us if we are hitting targets or if we are below target, if we need to sell more, if the areas are underperforming.

Similarly, with stock, if we are buying too much, over sold or under sold on certain products. That is going to effect to the whole ability of the company to sell."

2. What makes RS Sailing unique in what the company does?

"The products in general.

I've sailed pretty much every boat we made, and they are good. So when I look at other manufactories, we appeal on a 'cool' level with good quality.

Unique sides would be the aftersales and support that we give, we are pretty generous with anyone that buys a boat and we don't even talk about a warranty period, we will help them and work it out anyways.

Also, we are constantly changing; we are constantly trying to get better.

Competitors, stay always the same from my point of view while I am for instance visiting a boat show. They seem to really to appear not on it. At some point they might switch on. The cool thing about RS: 'We are always trying to get better'.

2.1. What are the success factors of RS sailing?

The events are key for how successful the brand is. But also, the class association, the RS Sailing community; which are groups of sailors and friends, club sailing.

The products are good and our general marketing is overall pretty strong. The name "RS Sailing" is quite cool. Also, the branding is good.

3. Could you give me a brief introduction on the current dashboard of RS Sailing?

"There is a number of current dashboards. The main once are sails analysis; that will tell us what is on order for a set of periods, what has been sold, what the target is for those sales and what we historically sold in the past.

The sales dashboards are pretty much all based around those four things (on order, sold, sales target and historically sold) but displayed in different ways. Just to make it as simple as possible I guess.

There is another one which is production based, which says what is our target for boat sales, what have we got on order, what have we invoiced already and what have we left to sell. I think that sales forecast and production forecast should be linked together. So we know if we have too much on stock.

3.1. What was the main reason to develop this dashboard?

"It was giving people information really. Because each month we can do a profit and lost in a balance sheet; it tells you the turnover, overheads but visually it is not very exciting. You really have to read in it to get the information out of it. It is just numbers on page, so if we could split it in sectors, into boats, even with overheads having simple graphs that mean that someone anyone can login and see have I spent too much. It is just going to make us better, I think."

3.2. What do you think of the effectiveness of that dashboard?

"It is getting better, I can see how it can look pretty, eye-catching. But it doesn't tell anyone straight away, you have to hover over these, since they are all numbers. It might give you a quick indication, but it is a bit cluttered. Sometimes it is good to just have a table of numbers, like we have sold this much and our target is this much. Because that is what you are trying to look at anyway. So, in this way it is half effective."

4. What do you think of the presented indicators for the dealer dashboard in the presentation?

"They all look like once we can get out, I don't know how they are linked into our total target. I guess we can do all of that, which will be really good, but I just don't know where the targets come from. Because I don't see that side. But it would be good to have all these targets into one place to have a clear overview. We have to figure out how we can link in on to obtain all the data."

4.1. Is there anything you would like to see in addition to these indicators?

"Not of the top of my head. No I can't think of any, because you've covered it all"

5. What are your expectations of the dealer dashboard?

"Unlike our current once, it would be better to have it a bit more 'live', like more API build into it and things that get them looking back and looking at it a lot.
At the moment, our once look obviously at invoices, orders and they are updated 4 times a day. But it would be more interesting if there was more like you have on your indicators, like website, Facebook; stuff that they can respond to."

6. Is there anything you would like to add to this interview beneficially to the project/ dashboard?

"I don't really, I think this is really good though. It is a lot of work, but this is a good project. And it is a perfect time for us as well."

9.4.7. Semi-structured interview 7; Richard Frost

Round 5	❏ Key objectives ❏ CSF ❏ Dashboard ❏ Indicators	**Richard Frost**

1.   Could you explain your role within RS Sailing?

"In brief, I make sure it all happens. So, sorting out production through its dispatch and everything in between. I am responsible for the full supply chain. Well I am responsible for the overall purchasing; the whole outbound supply chain, the very most of it."

1.1. What are your key objectives regarding your function and how are these linked to the main objectives of RS Sailing?

"To get boats out the door and money in the tail! I think that is the key objective of the business. Invoicing as much as possible and getting the money. The less the boats are build and out the door we can't invoice."

1.2. How would you clarify these objectives linked to the global dealers?

What is your contribution towards the global dealers of RS Sailing?

Everything, it is one and the same. So, they place orders; the salesman takes the order and I get the order out the door. I make sure the boats are built in the right place and dispatched, hopefully on time."

2.   What makes RS Sailing unique in what the company does?

"Our products and our range, that is what makes us unique. There is not another manufacturer out there that has the brand and depth in the range that we have and our operation is very different. We wholeheartedly support our dealers, that certainly helps."

2.1. What are the success factors of RS sailing?

"The products and the people; the team at the head office of Romsey as well as the dealers around the world. The combination, the dealers are part of the team."

2.2. What would help RS Sailing to create the ideal environment taking the following three figures into account; Flexibility versus accuracy versus cost management

"From my point of view the role I have within RS Sailing, we become less flexible to have better cost savings and better accuracy we got to be less flexible. Flexibility trips up all the time. We are always changing for the customer's desire. And I bed there's 5 other persons would say the same."

3.   Do you measure the effectiveness of the actions you do?

"No, well yeah to a degree. Yeah off course we do.

Okay, so we do that by the company target; invoiced and income over the year, stockholding, quantity and stock days. We have costs on shipping, costs on delivery's, dispatches from Rototek, which is all monitored."

3.1. When you look at the mentioned things you currently measure, are you satisfied with the current performance of RS Sailing?

"Yes, because we are hitting all the targets. But, there are always things to improve. But for the most part of the time of this year it comes done to production rather than our operations, so it supplies and holds on this time of the year."

4. What do you think of the presented indicators in the presentation?

"Yeah, all looks fair. I don't really get involved with this.

4.1. What are for you essential indicators to track the dealers on?

"Total target and total target quarter of the boat sales. Total invoiced and total on order maybe. Just that, that is what I care about."

4.2. Is there anything you would like to see in addition to these indicators?

"No, well the total target per fleet. The target broken down per fleet (per boat) then we can get a better view on it and see exactly how each class is performing in each country. You could overlay year on year boat sales to see the trend, see which one are flagging or dropping off."

5. What is for you key in tracking the progress of the global dealers?

"Projected figures; sales month on month. It's easier to set production levels."

6. What are your expectations of the dealer dashboard?

No, I don't really have any expectations. It is not something I would look at very often. The Sales team would. Since I would have for instance a conversation with their account manager and not with the dealer."

7. Is there anything you would like to add to this interview beneficially to the project/ dashboard?

"No, I don't think there is. No, absolutely not. It's good, I can see it will be valuable for sales and marketing, but production and operational wise perhaps less. There will be no information other than information I've already got."

9.5. Appendix 5: Proposed CSF's and KPI's

The following page shows an overview of the proposed CSFs and KPIs for the dashboard of RS Sailing.

Critical Success Factors	Defining CSFs → KPIs	Key Performance Indicator
Team	Creating new customer relationships	Total number of new leads vs target
		% of new customer's vs target
Brand awareness *Direct Mail*	Creating better reach and interaction with lead and customer base.	Total number of Direct Mails performed vs planned
		% of total mailing list that opened e-mail
		% of click throughs to the website via the Direct Mailing Campaign
Brand awareness *Website traffic*	Creating enhanced website traffic on http://www.rssailing.com	Total % of growth vs decline in visitors
		Total % of growth vs decline in page views
		Engagement number per age and gender
		Average spend time in minutes' vs target
		Conversion rate number of visitors' vs new leads
Brand awareness *Social Media*	Creating enhanced interaction on Facebook with customer base	Total posts vs target
		Total referrals vs target
		% growth on natural likes on page
		Total comments
		Total page views
Dealers	Creating local activities to transform leads into customers	Total planned sail events vs target
		Total achieved sail events vs planned
		Total 'open' sail events vs planned
Boat sales	Creating growth in global distribution	Total sales per quarter vs target
		Total sales vs total sales same date prior year
		Total delivered vs sold
		% parts sales vs total sales