

Problem Statement

The owner of The Bakery would like to maximize employee productivity, reduce food waste, and increase profit by implementing training on a uniform process for taking cake orders from customers.

Currently, employees of The Bakery are spending excessive time fixing incorrect customer cake orders because there is no formal training on how to complete this process. Each baker takes and stores their cake orders differently. The Bakery has also been giving customers their cakes for free to apologize for their mistakes and miscommunications. Several customers have come to The Bakery for order pick up and found that the bakers did not have their cakes ready. The Bakery is open for business eight hours a day. The Bakery employees currently spend an hour taking customer orders, two hours calling customers to clarify details for their cakes, and two hours handling customer complaints or revising cakes upon customer pickup. This leaves the bakers with only three hours to produce cakes.

The time imbalance has prevented the bakers from being able to focus on producing more cakes. Giving cakes away for free has helped reduce customer agitation in some cases, but it has also cost the company money. The Bakery owner is spending too much money on materials and labor to fix incorrect cakes.

Ideally, the employees at The Bakery will participate in training that determines a proper procedure for taking customer cake orders. Managers at The Bakery should be interviewed to provide examples of how they train new employees to take cake orders. The managers should determine the most common mistakes made when taking cake orders. They should also be asked about their ideal process for taking customer orders, to determine the performance gap that will need to be filled. The results of these interviews should be considered when creating a new, streamlined process for taking customer cake orders. Proper training should reduce wasted time, increase profits, and increase customer satisfaction with The Bakery.

Project Goal Statement

The Bakery workers will implement a uniform system for taking cake orders to improve communication and increase profits, reduce waste, and maximize productivity.

Learner Persona Introduction

All learner personas were derived from interviews with former bakery employees and personal observations. Please see the following pages to review detailed personas.

Name

May Kala

Demographics

May Kala has been a lead baker at The Bakery for the last two years. She graduated from Johnson and Wales University seven years ago with a degree focus in Baking & Pastry. She completed an internship at The Bakery during college and decided to come work full time for Mr. Benson. Being a first-generation graduate and child immigrant has instilled an intense work ethic in May. As the eldest of three siblings, being a leader has always come naturally to her. As a lead baker, May has been tasked with bringing The Bakery's cake and pastry design into a more modern era.

Job & roles

Lead Baker

Motivations & comfort zones

May is a very dedicated artist who has devoted years to her craft even going as far as working in France. Her comfort zone is in the kitchen surrounded by cake and pastry. She would love to continue working with Maggie and Luna to design and grow the social media of The Bakery. She would also love to begin showing the other baker/decorators some French pastry methods to elevate the desserts. She also thinks that it would be fun to teach a baking class one night a week as it will draw in more profit as well as new clientele. May believes that The Bakery can be elevated and brought into the new century while still holding onto that classic charm Patrick has cultivated.

Motto

"Mise en place."

Image



Technology skills & preferences

As a millennial, May has grown up learning how to work basic technology in school, therefore, she has experience using most equipment and computer systems. She has also taken control of updating The Bakery's computer and iPad to keep the systems running smoothly. She also tries to help provide the other employees with technical support should they not understand how to use the system.

Favorite brands, trends, culture

May incorporates a blend of traditional and modern styles in her baking methods. She often works with the cashier, Maggie, to promote The Bakery on all social media platforms. Staying up to date with the social media trends helps her develop new techniques and with suggestions in client sessions. May believes that the social media presence can be a positive attribute as it will bring new clientele from far and wide. She also hopes that the new clientele will boost The Bakery's popularity and sales so that Patrick can retire and pass it down to the next generation.

Experience with this concept

Before working at The Bakery, May held a job in France working with pastry and cuisine which taught her how an ordering system should work. This ordering system consisted of a printed or electronic form that simplified the process and helped to keep orders in line. May believes that this ordering form could greatly benefit The Bakery's ordering and communication issues so that all of the employees are on the same page and working efficiently.



Learner Narrative

Name: May Kala

Age:28

May Kala has been a lead baker at The Bakery for the last two years. She graduated from Johnson and Wales University seven years ago with a degree focus in Baking & Pastry. She completed an internship at The Bakery during college and decided to come work full time for Mr. Benson. Being a first-generation graduate and child immigrant has instilled an intense work ethic in May. As the eldest of three siblings, being a leader has always come naturally to her. As a lead baker, May has been tasked with bringing The Bakery's cake and pastry design into a more modern era.

May is motivated to keep this local staple thriving with The Bakery's classic dishes and sweet treats. She loves working with Patrick during opening hours as he teaches her the legacy recipes. May also loves training the new bakers, however, the current cake order issues are taking that time.

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LEARNER/USER PERSONA

Name

Luna Angelo

Demographics

Luna is 25 years old who just graduated art school six months ago. After struggling to determine an area of art to focus on, she stumbled upon the idea of decorating cakes. She began working at the bakery shortly after her graduation and jumped in with both feet. She takes pride in her own creative liberties and often comes up with her own interpretation of client requests, primarily because of a lack of detailed descriptions on order forms. This occasionally results in a product that is unsatisfactory to the customer. Luna is very committed to her role at the bakery and often comes in early or stays past her defined shift in order to complete her tasks.

Job & roles

Cake Decorator

Motivations & comfort zones

Luna is very passionate about her art and takes pride in producing a polished final product. She is not afraid to test boundaries or to insert her own interpretations of designs into her cakes which can get her into trouble. While she respects the owner and lead baker, she is not afraid to push back on authority if she deems it necessary.

Motto

“Pour your heart into your art.”

Image



Technology skills & preferences

Luna is proficient in graphic design and a variety of other artistic methods, however, she is still perfecting her buttercream and fondant skills. She prefers to design a cake digitally first before starting on the actual cake.

Favorite brands, trends, culture

Luna's interests include listening to music and anything related to growing her art portfolio. In order to help “build her brand” she often posts photos and videos of her cakes on her various social media accounts. She also utilizes social media, such as TikTok or Youtube to learn new decorating techniques.

Experience with this concept

Luna has an art degree but has not had any formal training in cake decorating.



Learner Narrative

Name: Luna Angelo

Age: 25

Luna is a 25 year old cake decorator at the bakery. She graduated from art school without a clue what direction to take her career. She stumbled upon the position of cake decorator and decided it would be sufficient until she figured out how to best utilize her degree. To her surprise, she fell in love with her role at the bakery and has enjoyed learning a new skill. While she is still fairly inexperienced, she is eager and willing to learn new techniques and often puts in extra hours in to complete orders. She has even offered to spend some of her days off attending decorating classes to refine her newfound artform.

Luna's enthusiasm can be both her greatest strength and her biggest weakness. While she works hard, her artistic passion can sometimes get the best of her as she often indulges in creative liberties when filling orders, which has led to some unhappy customers. Part of her complaint, though, is that the descriptions on the order forms are extremely vague, so she is just working with what she is given. She is a respectful employee but is also not afraid to push back on her superiors when they question her work.

Recently, as Luna has gained confidence in her work, she decided to start a couple of social media accounts to document cakes she has decorated. She hopes this digital portfolio will help her establish a "brand" to generate more opportunities for herself. She has also tried to explain to the bakery owner, Patrick, that activity on social media will help generate business for the bakery. He is reluctant, but has allowed her to mention the bakery in her TikTok tutorials she has created for different techniques she has mastered.

LEARNER/USER PERSONA

Name

Maggie Andrews

Demographics

Maggie is a 20 year old aspiring influencer. She is currently pursuing her degree in Digital Marketing with hopes of working as a social media manager for a large branding company. Maggie began working at The Bakery in hopes of funding her education and has grown to love the atmosphere. She has a natural ability to connect with the customers. She has recently started a social media account where she posts aesthetic photos of the products. She believes that The Bakery needs a major tech upgrade to "make it modern". Although Maggie does not plan on working at The Bakery forever, she wants to see the company thrive which is why she thinks employee training would be a positive experience for everyone.

Job & roles

Cashier & Social Media Manager

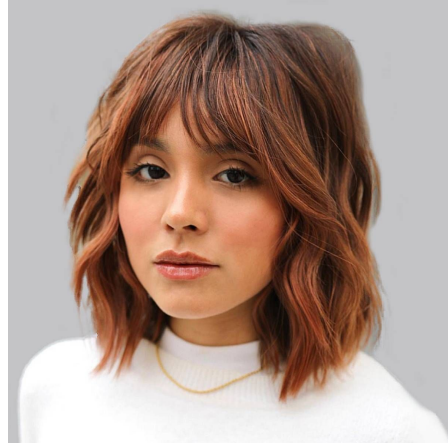
Motivations & comfort zones

Maggie is a very confident and strong spoken person with many opinions. She can often be stubborn in her beliefs which can cause conflict. She loves interacting with customers and recommending products based on her knowledge and personal opinions. She feels that she can offer more to The Bakery with her knowledge of trends, but does not want to overstep her position. She would be very willing to join in team training to help with the cake ordering issue. She believes that the owner needs to step into the future so that The Bakery will be up to date when it's time to pass it down to his grandchildren.

Motto

"Take the risk or lose the chance."

Image



Technology skills & preferences

Maggie is a firm believer that technology can make everyone's life better and more connected. Being an influencer she uses all forms of social media such as Instagram, TikTok, and Twitter. She believes that The Bakery will benefit from becoming more technologically advanced. She loves to design backgrounds and take photos of the products for the social media accounts. She is also very adept at using the electronic products at the cash register.

Favorite brands, trends, culture

Influencing the masses requires Maggie to stay up to date on the latest trends. She knows what is going to be popular a year in advance and believes that could work in favor for The Bakery. She loves anything to do with fashion and makeup. She has also recently found a passion for dancing which she showcases on her TikTok. She is always wearing the most fashion forward outfits and takes great pride in her wardrobe.

Experience with this concept

This is Maggie's first job, but she is a quick learner and loves working in the front of the shop. She is advanced in her knowledge of marketing and social media which she believes to be a huge asset.



Learner Narrative

Name: Maggie Andrews

Age: 20

Maggie is a 20 year old aspiring influencer. She is currently pursuing her degree in Digital Marketing with hopes of working as a social media manager for a large branding company. She lives with her single mother and began working at the bakery to help pay for her tuition. However, to her surprise, Maggie has grown to love the atmosphere and recommending products to new and repeat customers. She has a natural ability to connect with the client and wishes she could play a role in helping plan special orders. She has recently started a social media account for The Bakery where she posts aesthetic photos of the products. Although Maggie does not plan on working at The Bakery forever, she wants to see the company thrive which is why she thinks employee training would be a positive experience for everyone.

Maggie believes that updated technology and proper employee training could easily fix the ordering issue. Although the owner recently upgraded the equipment by adding some iPads and a computer, Maggie thinks that there are still many apps and functions that could be useful to helping make orders. She has tried to implement some of these methods but it is beyond her skillset. While Maggie is an independent and strong willed person, she does not like to overstep her boundaries. However, if she believes that the current way of conducting business is not sustainable, she will make her opinion heard.

Maggie's social media presence and ability to keep up with trends could prove beneficial in helping the client place orders. She knows that Patrick wishes to pass the business down to his grandchildren and believes that updating the restaurant will only increase it's value.

LEARNER/USER PERSONA

Name

Patrick Benson

Demographics

Patrick Benson is a 67 year old man. He has been the owner of The Bakery since he inherited it after his mother's passing in 1996. His mother opened the bakery in 1963 and it has been a town staple ever since. The town has seen incredible growth the past several years, meaning Patrick has seen more new people than ever before. That also means he has had to hire new staff to keep up with The Bakery's demands. He has two grown kids and seven grandkids. His children have decided to pursue other professional dreams, but a few of his grandkids have taken quite an interest to running The Bakery.

Job & roles

Bakery Owner

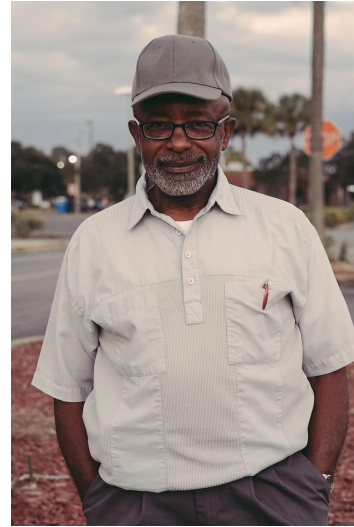
Motivations & comfort zones

Patrick loves to interact with customers, even if he doesn't always hear them the first time. He loves teaching the lead baker his famous cake recipes, but doesn't have the artistic eye for decorating, so he leaves that up to the cake decorator. He enjoys being a positive presence at The Bakery, both for his employees and his customers. His grandkids have been coming around more to learn how The Bakery operates. He wants to retire soon and hand the family business of to them, but he wants to get this cake ordering situation resolved before he feels comfortable doing that.

Motto

"Work hard, be kind."

Image



Technology skills & preferences

Before 2010, Patrick never used anything more than a pad of paper to total up orders. The phone in The Bakery is the same landline that was installed in the 1990s. Patrick bought a computer and a few iPads for The Bakery employees to use, but he takes a hands off approach to conducting business through those devices. He is willing to try to learn, but he is unsure of his efficiency.

Favorite brands, trends, culture

Patrick enjoys the simple things in life. He wears the same brown pants and beige shirt most days. Sometimes he will switch up his ball cap for fun. He relies on the younger bakery employees to understand customer references to pop culture. He thinks trends are silly and couldn't imagine wasting money to keep up with them.

Experience with this concept

Patrick's mother trained him to take cake orders, but that was in the early 1970s. He has never experienced a training using technology, and he has certainly never requested this type of training assistance for this many of his employees at the same time.



Learner Narrative

Name: Patrick Benson

Age: 67

Patrick spends most of his days at The Bakery. He has recently given more responsibility to the lead baker so he can enjoy extra time at home with his wife, Shauna. Shauna has recently been diagnosed with Alzheimer's. Since Shauna's diagnosis, Patrick has been working hard to ensure The Bakery can survive the transition from his ownership to his grandkids'. They are savvy young people, and he knows they will be able to continue the proper training procedures once they are put in place.

Patrick lives less than half a block from The Bakery, so he walks to work most days. His sister has been coming to his house daily to look after Shauna while he works. Patrick regularly worked eight hours per day, six days per week until a few months ago. He has reduced his hours to five hours per day, four days per week. He has also recently hired several new employees to help cover those shifts when he is gone. Because of all the transition, he is anxious to get these training procedures finalized. He will be able to worry less about Shauna if he is home more often with her. He doesn't want The Bakery to suffer in his absence, either. When he gets home from his shift, he enjoys a leisurely walk around the neighborhood, and sometimes he gets to cook dinner for his kids and grandkids.

Patrick and Shauna own a television, but that is mostly for Shauna's entertainment. Patrick likes to spend his free time sitting on his front porch, drinking coffee, and chatting with his neighbors. He enjoys solving puzzles and reading mystery novels. He uses a cell phone occasionally to communicate with his children and grandchildren, but prefers to talk in person. His youngest grandchild created a Facebook profile for him to keep in touch with old family friends, but he rarely uses it. He is comfortable with learning new things, but he gets easily embarrassed when it comes to typing on the computer or iPads. He feels he is too slow to be efficient, but he is willing to do what it takes to make sure The Bakery can remain in business.

Project Scope

Team members include Adrian, Allie, Sarah, and Skylar. Team members will collaborate with the customer (The Bakery) to determine acceptable levels of quality for all deliverables. Team members will work remotely to complete this project. Our project plan includes two iterative cycles.

The silver cycle begins on 6/21/2023 and will conclude on 6/27/2023 at 8:00 p.m. During this cycle, the team will work on their first version of the project, including the artifacts that will be delivered to The Bakery. The team will meet to discuss the quality of the artifacts and adjustments that will need to be made moving forward. At the end of the silver cycle, the team will produce a status report to update the customer on the project's progress.

The gold cycle begins on 6/28/2023 and will conclude on 7/2/2023 at 8:00 p.m. During this cycle, the team will create and approve their final version of the project, including the artifacts that will be delivered to The Bakery. At the end of the gold cycle, the team will deliver the final status report as well as the aforementioned deliverables.

Constraints that may limit or negatively impact the outcome of the project include a tight schedule and timeline for creating deliverables, limited information, and vague expectations.

Some examples of scope exclusions for this project include the technology The Bakery will use to implement the new ordering system. These are resources that the team will not be able to provide to The Bakery, due to budget constraints.

An all-encompassing list of activities, tasks, and deadlines for this project can be found in the [Milestone Spreadsheet](#).

Final deliverables for this project will include

1. Initial order/contact form (digital)
2. Customer/decorator consultation form (hard copy)
3. Cake design approval protocol
4. Cake ordering procedural flowchart

We conclude that the initial order/contact form will be considered successful if communication improves among employees and customers. The criteria for an acceptable level of quality for this artifact include:

1. Functioning digital Google form
2. Space for customer contact information (phone number, email, address)
3. Space for brief customer wants/needs description
4. Dates for initial inquiry and cake completion
5. Options for delivery or pick-up

Project Scope (continued)

We conclude that the customer/decorator consultation form will be considered successful if there is an increase in order accuracy and customer satisfaction and a decrease in resource waste. The criteria for an acceptable level of quality for this artifact include:

1. Employee names, responsible for customer communication and design
2. Date and time for cake completion
3. Options for delivery/pick-up
4. Design space to sketch
5. Customer name
6. In-person or phone call consultation
7. Cake requirements from customers (flavor, shape, size, colors, dimensions, etc.)

We conclude that the cake design approval protocol will be considered successful if it improves communication, reduces food waste, and improves employee accountability. The criteria for an acceptable level of quality for this artifact include:

1. A digital cake mockup template on Canva
2. Instructions for creating the digital mock-up
3. Instructions for sending to customer for approval
4. Instructions for lead baker approval
5. Signature boxes for accountability

We conclude that the cake ordering procedural flow chart will be considered successful if it improves communication and improves employee accountability. The criteria for an acceptable level of quality for this artifact include:

1. All procedural steps in a logical order
2. Outlines employee expectations within each step of a procedure
3. Defines the role of all employees within the cake ordering procedure

Approval Signature

By signing your name below, you approve of this project scope statement. You confirm that the document is complete, accurate, and all parameters have been included.

X

Customer Signature

X

Date

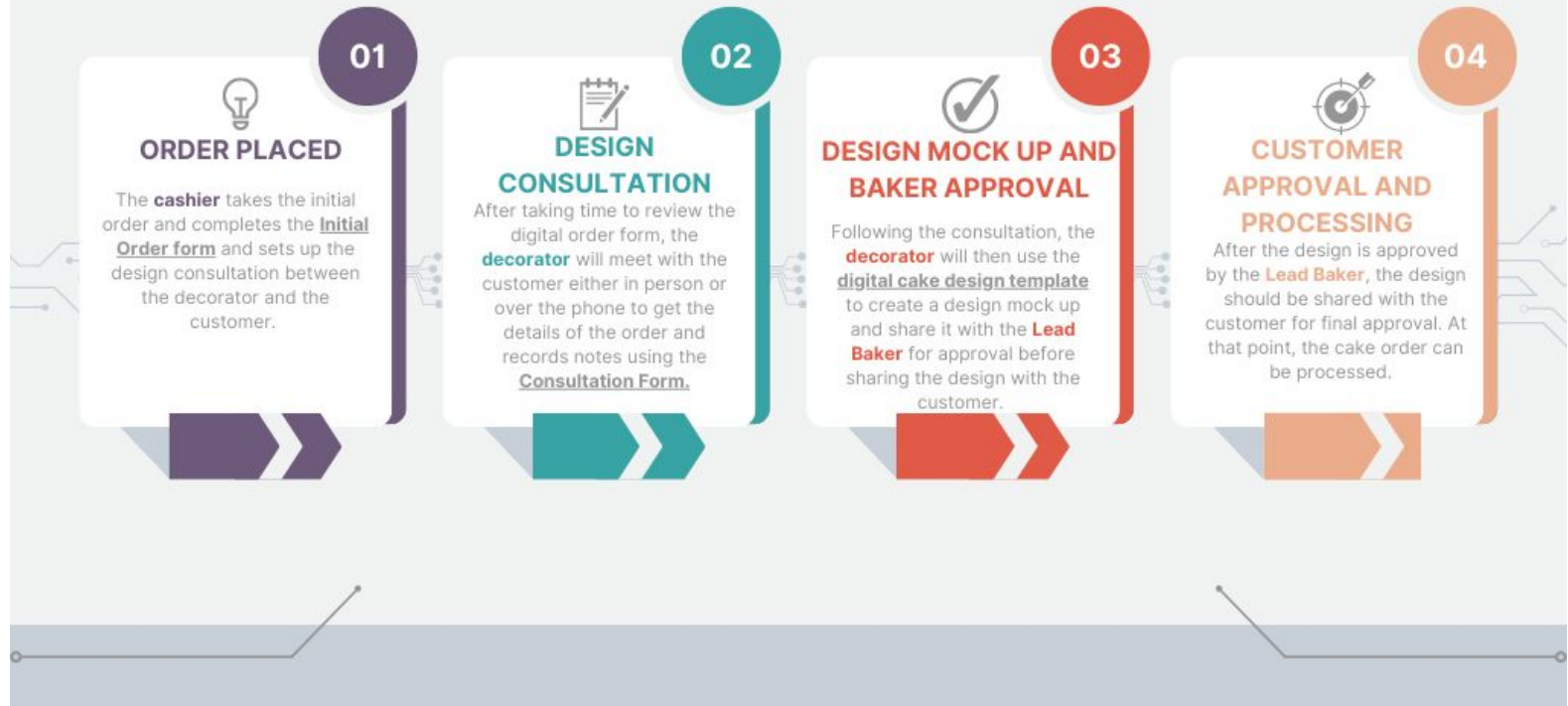
Deliverable #1: Procedure Flow

Chart

The Bakery

Cake Order Protocol

An order in the cake ordering process can pass through many hands. To ensure accuracy and quality control, employees of The Bakery should follow the protocol below.



A digital version with embedded links can be found [HERE](#).

Deliverable #2: Digital Initial

Order Form



Initial Order Form and Contact Information

Please fill out this initial order form to the best of your ability. Once you have completed this form, it will immediately be sent to our bakery staff. We will review your request and contact you with further questions. Thank you for choosing The Bakery!

The Bakery Cashier - If you are taking the order for a customer (in store or over the phone) please fill out this form entirely.

View the full order form [HERE](#).

Deliverable #3: Design

Consultation Form

THE BAKERY CUSTOMER CONSULTATION FORM

Order Date	Pick-Up Date/Time
In-person or Phone Consult <input type="checkbox"/>	Pick-up or Delivery
Decorator Name	
Customer Name	
Customer Number	Customer Email
Type of Dessert	
Flavor	Icing Type
How many People	Shape/Size
Special Request/inscription	
Food Allergies/Restrictions?	

DECORATOR SKETCH

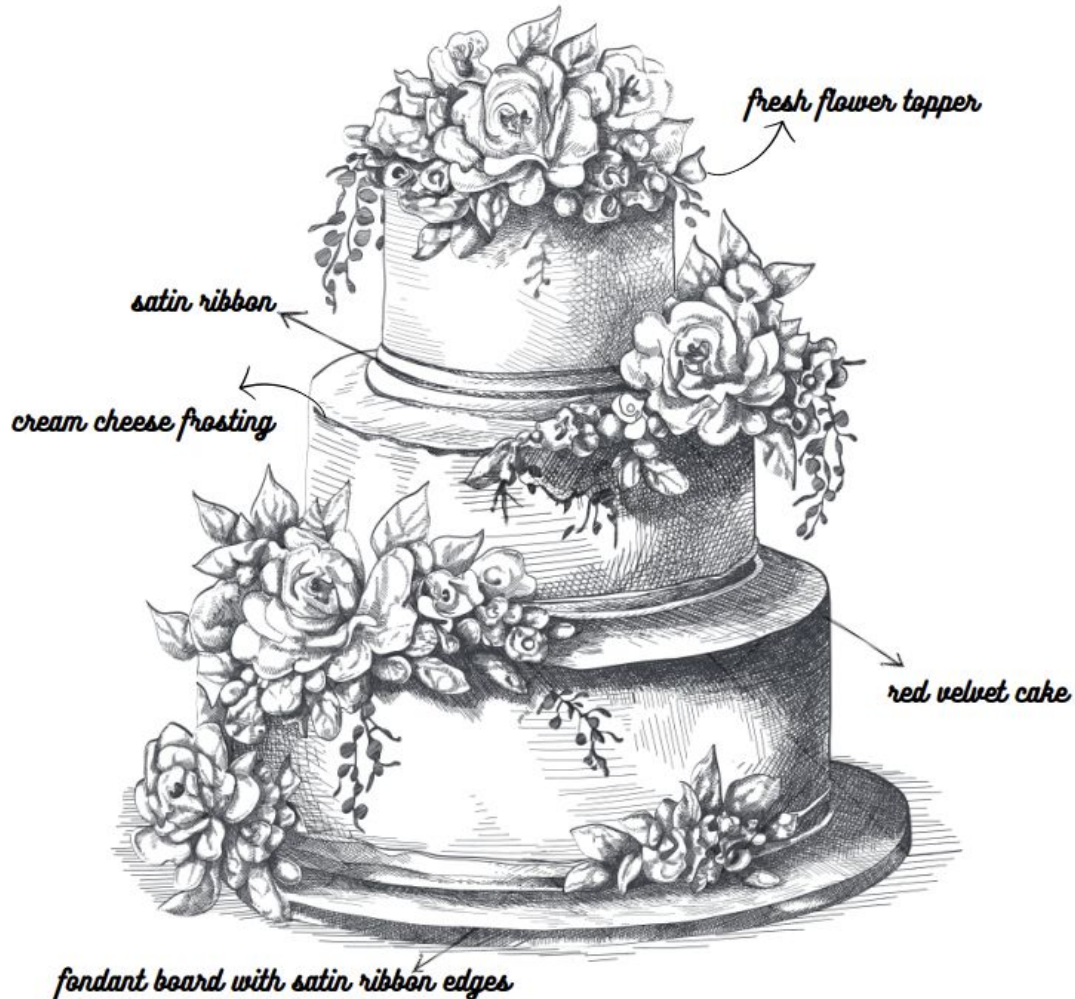
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View a digital version of the order form [HERE](#).

Deliverable #4: Design Template & Client Contract (continued)

Example Design Sketch

Designed By: *Zuna Angelo*



Cake Dimensions & Specifics:

- Cake Size & Dimension: *3 tier rounds: 12", 10", 8"*
- Serving Size: *approximately 100 people*
- Icing Flavors & Colors: *Cream Cheese/White*
- Filling: *none*
- Cake Flavors & Colors: *Red Velvet*
- Special Design Requests: *fresh flower topper*
- Extra Notes: *Satin ribbon was added by the designer and is completely optional.*

View a digital version of the order form [HERE](#).

Deliverable #4: Design Template & Client Contract (continued)

Client Design Sketch

Designed By:

Cake Dimensions & Specifics:

- Cake Size & Dimension:
- Serving Size:
- Icing Flavors & Colors:
- Filling:
- Cake Flavors & Colors:
- Special Design Requests:
- Extra Notes:

View a digital version of the order form [HERE](#).

Deliverable #4: Design Template & Client Contract (continued)

Final Approval Contract

Upon signing this contract you, client name, agree that the cake depicted above is as agreed upon after your initial consultation. You acknowledge that the cake and icing flavors are accurate as well as the decoration. If the designer used creative liberties to add extra design options to the sketch, you as the customer have the right to decline or alter them. Signing this document solidifies that the sketch above is accurate to the details outlined in the customer/decorator contact form. Changes to the overall design, flavors, cake design, etc. will be accepted until two weeks before the event date and may alter the price. Changes will not be accepted after this date. In the event of a cancellation, cakes cancelled two weeks before the date will receive a full refund. Cakes cancelled after the two week window will not receive a refund. If the date of your event changes, please contact the store to discuss the options available. If you wish to include any specific items on your cake, then you are responsible to deliver them to the bakery no later than two weeks before the event. It is our hope that The Bakery satisfies your cake needs with upstanding customer service and high quality products. We look forward to creating the perfect cake for your event.

Upon receiving this contract by the email you listed on the order form, please add your signature in the designated space below. By signing this contract you, client name, agree to all of the terms listed above for the cake order placed on enter date.

X Signature.
Customer Signature

X Signature.
Designer Signature

X Signature.
Lead Baker Signature

View a digital version of the order form [HERE](#).

Final Status Report

We decided to complete this project in two cycles. We named these cycles “silver” and “gold.” Our silver cycle ran from 6/21 - 6/27.

Work that was completed during this cycle included a rough draft of the following:

1. Problem statement
2. Goal statement
3. Learner personas - lead baker, cashier, decorator, owner
4. Project scope
5. Mid-point status report
6. Deliverables - initial order form, customer/decorator form, cake design template, procedural flowchart

We also conducted the following team meetings:

1. Team charter meeting 6/19
2. Project plan meeting 6/21
3. Status report meeting 6/26

The next cycle we completed was our “gold” cycle, which ran from 6/27 - 7/2. Work that was completed during this cycle included the final version of the following:

1. Problem statement
2. Goal statement
3. Learner personas - lead baker, cashier, decorator, owner
4. Project scope
5. Final status report (this report)
6. Deliverables - initial order form, customer/decorator form, cake design template, procedural flowchart
7. Updates we made to deliverables
 - a. Added “billing address” to the initial order form
 - b. Added dietary restriction/allergy box to customer/decorator form
 - c. Added a blank version of the cake design template as well as an example
 - d. Linked deliverables in the procedural flowchart

We also conducted the following team meetings in our gold cycle:

1. Final project meeting - 6/29

We were able to create and incorporate all of the planned project elements. We edited, reviewed, and compiled all final versions of this project on 6/29. According to our initial timeline, we finished ahead of schedule. We will maintain communication with The Bakery to evaluate the effectiveness of the deliverables.