Using EDI Questionnaire

My name is _____ and I'm calling from INPUT, a Market Research Firm in California. We have a special research program in Electronic Data Interchange, and I understand you are using EDI. Is that correct?

If you have a few minutes, I'd like to ask you some questions which are designed to help improve EDI services and software. The results of our survey will be read by the companies offering EDI products. By the way, we won't be identifying you or your company in this survey, only the aggregate results. In exchange for your help, I'll send you a summary of our survey. Fair enough?

1. Can you tell me **when you started using EDI?**

a. _____ this year (1988) b. _____ LAST year (1987)
c. _____ 1986 d. _____ 1985 or earlier

2. About **how long did it take to you implement** your EDI, once you got started?
_____3 months _____6 months
_____longer—how long?:_____

3. Where there any particular **problems** that stick out in your mind regarding getting your EDI system up and running?

_____
_____
_____

4. How did you go about IMPLEMENTING EDI? Did you:

a. Contract with a THIRD PARTY to help implement your EDI system?
☐ yes ☐ no
(IF YES ASK:) Why did you take this approach?

_____
_____
_____

[IF YES] Since you used a third party to help you implement EDI, was that third party: [READ OPTIONS]

(i) _____ An independent consultant?

(ii) _____ A professional services firm?

(iii) _____ An industry association? [IF YES:]
WHO?_____

(iv) _____ A communications company, such as a value added network?

(v) _____ A Remote Computing Service?

(vi) _____ A financial services organization?

[IF NO] Based on your answer, I assume your staff implemented the system TOTALLY YOURSELF? Is that correct?
❑ yes ❑ no

5. Was your EDI **IMPLEMENTATION** MANAGED BY THE FUNCTIONAL DEPARTMENT (such as marketing or order entry), or did INFORMATION SERVICES (IS) MANAGE its implementation?
a. _____ IS b. _____ functional dept. c. _____ committee
d. _____ d/k e. _____ other answer: _____

6. Did you start using EDI in response to a major customer or customers, or did you did it for your own reasons?

_____ customers _____ own reasons:

What were those reasons? _____
_____
_____

Communications & Hardware Environment

7. What **TYPE OF COMPUTER** are you using for EDI? Is it a
a. _____ micro b. _____ a mini or c. _____ a mainframe?
d. _____ other
specify:_____
_____

8a. Do you think that the computer equipment you're now using for EDI might **change** in the foreseeable future, say the next two or three years?
❑ yes ❑ no

b. **WHY** would it change?

Comments:_____
_____

9a. Are you doing EDI ____ DIRECTLY WITH YOUR TRADING PARTNERS or do you go through ____ A THIRD PARTY DATA NETWORK?

b. [IF THIRD PARTY NETWORK] Which network are your primarily using for EDI?
_____AT&T
_____GEISCO
_____McDonnell Douglas' Tymnet
_____Sterling Software's ORDERNET
_____IBM Information Network
_____Kleinschmidt
_____other:_____

10a. On a scale of 1 -5 with five being "HIGHLY LIKELY," HOW LIKELY is it that you would **CHANGE YOUR CHOICE OF NETWORKS FOR EDI?**
1 2 3 4 5

b. WHY that rating? _____

_____

_____

11. On a scale of 1 -5 with five being "HIGHLY RATED," how would you rate the third party network in terms of:

a. Overall technical quality 1 2 3 4 5

b. Customer support 1 2 3 4 5

c. Price 1 2 3 4 5

d. Clearness of the bill 1 2 3 4 5

e. Do you have **any specific complaints** about the network you are now using?

_____

_____

_____

_____

12a. On our scale of 1-5, with 5 being HIGHLY IMPORTANT, how important is it for your network vendor to connect with another network. In other words, how important is it for you to send EDI documents to someone who subscribes to another network?
1 2 3 4 5

b. Why that rating?

_____

_____

_____

_____

13a. On a scale of 1-5, how important is it for you to be able to send a **hard-copy** of your EDI document to a trading partner, THROUGH THE NETWORK... in other words, have it printed and mailed to the recipient.
1 2 3 4 5

b. How about sending a document to a **FAX** machine... how important is this on the scale of 1-5.
1 2 3 4 5

c. Why did you rate these two, hardcopy and FAX, this way:

_____

_____

_____

14. Could you tell me approximately how much you figure you've spent on EDI services last year? In other words, for using the network you described above? $_____.

15. As part of your **INTERNAL EDI development** work, I presume you directed some of your people to the project, correct?
    ❑ yes ❑ no

a. Could you estimate the amount of effort this **internal development** work cost, in a dollar amount? An approximation would be fine. I will be asking about development work in systems linked to EDI, but first, I'd like to get a sense of the work associated with developing **ONLY your EDI capabilities.** $_____ [IF CAN'T ESTIMATE DOLLAR AMOUNT] How about in terms of "man-days" or months of effort? _____(day/months/years - circle which).

b. Now, we know that EDI can **stimulate** other development work, for example, on your purchasing system, order entry or accounts receivable systems. **Has EDI "stimulated" any other internal development work?** Y/N. [IF YES] Could you tell me a little bit about these projects? What systems were involved?_____

Can you estimate the dollar or "man-day" effort associated with these EDI "Stimulated" Projects: $_____ or _____days/months/years.

Software

Next, I have a few questions about EDI Software.

16a. Did you WRITE THE EDI SOFTWARE yourself, did you PURCHASE it, OR did you BUY A PACKAGE AND CUSTOMIZE IT?
(i) _____ Write (ii) _____ Purchase (iii) _____ Buy and Customize

b. Why did you take this approach? _____

c. If you purchased software, what vendor did you choose?

d. Why did you choose this particular company?

17. Could we rate the importance of **software features**? On a scale of 1-5, with 5 being very important, how important is it for EDI software to:

a. BE **INTEGRATED** with other business applications such as accounting, inventory, etc.
1 2 3 4 5

b. Support **GRAPHICS**
1 2 3 4 5

c. Be **EASILY USED** by non-computer users
1 2 3 4 5

d. Have **ENCRYPTION** capabilities
1 2 3 4 5

e. Be **EASILY UPGRADED** to new standards
1 2 3 4 5

f. **ACKNOWLEDGE** successful transmission
1 2 3 4 5

g. Report **EXCEPTIONS** clearly
1 2 3 4 5

h. Have a **MAINTENANCE AGREEMENT** for updates/fixes
1 2 3 4 5

18. With regard to INTEGRATING EDI SOFTWARE with other applications such as accounting, or purchasing, which is more preferable:

a. _____ To integrate the EDI software with your other applications YOURSELF.
b. _____ To hire a CONSULTANT OR PROFESSIONAL SERVICES firm to integrate the EDI software with your other applications, OR
c. _____ To buy NEW SOFTWARE for accounting, inventory, etc. with built-in EDI functionality.

19. What do you think is needed to make EDI software work more closely with your other applications?

_____
_____
_____

20. What **transactions** are you now doing through EDI, and which do you plan to do via EDI, and in what time frame?

Type of Document	Time Frame			
	now	1989	3yrs	d/k
a. ____Purchase Orders FROM customers	___	___	___	___
b. ____Purchase Orders TO suppliers	___	___	___	___
c. ____Invoices	___	___	___	___
d. ____Bills of Lading	___	___	___	___
e. ____Payments	___	___	___	___
f. Others_____	___	___	___	___
_____	___	___	___	___

21a. Do you think there are any additional transactions or information still needed from the EDI standards? Y/N

b. How about any **special needs in your industry** that are not being addressed?

c. Comments:

_____
_____
_____

22. Could you estimate to be your **GROWTH IN THE NUMBER OF EDI TRANSACTIONS,** first between the end of 1986 and the end of last year (1987)?
_____ %

23. And how about your **EDI EXPECTATIONS FOR THIS YEAR**...what percentage of growth in transactions would you estimate?____%
comments:_____

24. Have you done any **cost analysis**, on a **per-transaction** basis, of your **PAPER** BASED systems for purchase order processing, invoicing or other routine paperwork of this nature? (If yes: What did you find out?)

25. Have you done any analysis of the cost, on a per transaction basis, of any **EDI** transactions? (If YES: What did you find out?)

26. With approximately how many other companies do you exchange EDI TRANSACTIONS:
    a. 1-5
    b. 6-10
    c. 11-20
    d. 21-30
    e. 31-40
    f. 41-50
    g. 50+ how many:_____

27. Do you have any estimate of how many additional companies you will be adding to your EDI THIS COMING YEAR?
    a. 1-5
    b. 6-10
    c. 11-20
    d. 21-30
    e. 31-40
    f. 41-50
    g. 50+ how many:_____

Issues

This Final Part of the Survey Deals with EDI Issues and Concerns. Do you have just a few more moments?

28. Let me read you a list of issues and problems which we believe people may be concerned about, and ask you for a rating, again on a 1-5 scale, with "5" being "a serious concern" and 1 being "not a serious concern" and get your reaction:

How much of a concern are:

a. The actions of your COMPETITORS with regards to EDI
   1 2 3 4 5

b. Concerns about the ENTIRE SYSTEM including hardware and software which you may install
1 2 3 4 5

c. Concerns about the COST of Using EDI
1 2 3 4 5

d. Network/Data SECURITY
1 2 3 4 5

e. Software MAINTENANCE
1 2 3 4 5

f. INTERNATIONAL EDI capabilities, that is, the ability to do business with people in other countries
1 2 3 4 5
(e.i.) Are you doing any international trading now?
❑ yes ❑ no

g. Changing BUSINESS PRACTICES, for example managing the change from paper forms to electronic forms
1 2 3 4 5
h. RELIANCE on ONE VENDOR or Service
1 2 3 4 5

i. VENDOR VIABILITY
1 2 3 4 5

j. EDI STANDARDS and COMPATIBILITY
1 2 3 4 5

k. OTHER CONCERNS?_____
1 2 3 4 5

l. _____
1 2 3 4 5

THAT CONCLUDES OUR FORMAL INTERVIEW. Is there anything else you think we should consider in our report on electronic data interchange? Are there any colleagues at other companies we might call?
Name: _____ Phone: _____

Thank you very much for your help. Your comments are appreciated, and will help make our report most informative and valuable. We should have the executive summary out to you within 6-8 weeks. Can I verify your address and a little about your company?
[INTERVIEWER: COMPLETE COVER PAGE REGARDING SALES REVENUES, NUMBER OF EMPLOYEES AND INDUSTRY SECTOR.]

Thanks again.

INTERVIEWER: PLEASE EVALUATE THIS RESPONDENT:

a. _____very helpful b. _____somewhat helpful c. _____ not helpful