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The Importance of Process Documentation in the Workplace

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“The Importance of Process Documentation in the Workplace”

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Table of Contents

Introduction

In the summer and fall of 2021, I had the opportunity to grow my personal and professional skills through an internship with J.B. Hunt Transport Services in the corporate finance and accounting department. J.B Hunt is a transportation and logistics company that provides supply chain solutions to customers throughout North America and is centrally located in Northwest Arkansas. They have been experiencing exponential growth within the past decade, quickly climbing the Fortune 500 chart. In 2021, they were ranked at 315 on the Forbes Fortune 500 chart and have a company net worth of approximately $20.22 billion. J.B. Hunt has experienced this success due to its many differentiating competitive advantages, including a strong focus on intermodal transportation, a means of transportation that utilizes more than one mode of transportation, and dedicated contract services, "a third-party service that dedicates equipment (vehicles) and drivers to a single customer for its exclusive use on a contractual basis" (Penske Logistics). 89 percent of its total sales revenues can be accounted for by their intermodal and dedicated contract services sectors of the companies, with intermodal accounting for a majority (i.e., 56%) of sales. They have also seen a large rise in demand for their final-mile service, which is the fastest growing sector of their company that organizes the delivery of goods from a transportation hub to its final destination. Their main headquarters is located in Lowell, AR, and the office had its newest expansion in 2017 with an additional 144,000 square foot office space added on the campus. They also have various locations across the country, including Dallas, TX, Chicago, IL, and New York, NY. J.B. Hunt currently employs over 24,000 individuals and operates more than 12,000 trucks across the United States, Mexico, and Canada.

There were several reasons why I was attracted to J.B. Hunt as a company that led me to accept my internship offer. Firstly, the company culture at J.B. Hunt is emphasized and constantly implemented through various organizations and events, which was a factor that held high importance to me when I was making my decision as to where I wanted to intern. According to the CEO, John Roberts, "[their] culture at J.B. Hunt is built around empowering our employees. [They] strive to create an environment where every idea is valued, and everyone has plenty of opportunities to grow." The company supports several employee resource groups that not only support the J.B. Hunt community but the Northwest Arkansas community as well. Some of these groups include GROW, a group centered around celebrating the personal success of women, LEAD, a group geared toward the inclusion of Latino individuals and culture, and PLUS+, a group created to provide a safe space for individuals who identify as LGBTQIA+. These groups were a large reason that I chose to intern for J.B Hunt. As a minority, I want to work for a company where differences are celebrated and all feel welcome, regardless of one's background. Because J.B. Hunt places a strong emphasis on diversity, equity, and inclusion through these resource groups, I felt as though the culture was a good fit for me. Additionally, J.B. Hunt has supported several Northwest Arkansas projects, including a $5 million dollar donation to the Children's Hospital located in Springdale. As a NWA native, I wanted to work for a company that has had a strong community presence throughout the years, and J.B. Hunt exemplified this idea through their support in several projects that have helped in uplifting and growing my community.

As stated before, I interned with the finance department at J.B. Hunt this summer. My department directly managed the corporate accounting, fixed assets, workday, and financial systems sectors of the department. Overall, the main objectives of my department include month end closing tasks for the company along with numerous other activities, such as reconciliations and reports. Every strong company needs equally strong finance and accounting backing, and it was extremely valuable to see the finance side of a transportation company, directly linking both my finance and supply chain management backgrounds that I have chosen to focus on throughout my college career.

Problem

This summer, I worked under the finance and accounting team, and my supervisor was the senior director of the finance and accounting department. When first starting the internship, he explained to me that my main task for the summer was to help create process documentation for his team. He stated that they currently had no documentation for any of the team's month end closing checklists, which was causing problems that could continue to worsen in the future if not properly addressed.

Firstly, if anyone on the team needed an extended leave or left the position, they would have major difficulties training other members of the team to pick up these tasks without some sort of documentation as reference. In the past, there was a large struggle when a member of the team was absent, especially during month-end closing week, and there were several mistakes made due to lack of documentation for other team member's tasks. This often resulted in completing work past deadlines and working longer hours than expected, creating unnecessary stress on not only the accounting and finance team but also other teams in the company who are reliant upon the work of the finance and accounting team. Because this issue affected external teams in the company, it was crucial for my manager, the leader of the finance and accounting department, to adequately solve the issue by creating some sort of documentation to alleviate the lack of transparency between each team member's work.

Additionally, documentation would be useful as reference for both internal and external auditors of the company. Several members of the finance and accounting team worked directly with auditors and struggled to be able to answer questions regarding their work, as they did not have a strong point of reference for their work that they could also show to the auditors. This then caused the auditors to have to take extra time and steps to verify the accuracy of the work being done by the team, which once again caused concern to external teams outside of the accounting and finance team. With proper documentation in place, it would be more convenient for the audit teams to properly do their work and ensure that all work done by the team is accurate and complete. This would in turn allow external teams to have more trust in the work that the accounting and finance team does, which helps ensure a positive work dynamic and creates a stream of open communication within the company.

Furthermore, a problem that the team faced while doing their work was a lack of consistency among different team members' outputs. My supervisor explained to me that they often used slightly different methods and variations of wording and accounting jargon while completing their work, which caused him to spend more time reviewing and confirming the validity of their month end closing processes. He wanted to have documentation in place that used consistent wording that would create more transparency in the team so that they would be working in harmony rather than working in solitude.

Finally, process documentation would help the team understand why they are doing the work that they are doing and help them realize the significance of their work. While the team was quite strong in the fulfillment of their tasks, many of them lacked a complete understanding of the role of the work they were doing in the grand scheme. This included topics such as why the work was being done, how to confirm the validity of the work they produced, and where their work was coming from and going to beyond the scope of their own department. Without proper process documentation that would assist to outline these major topics regarding the overall scope of their work, many members of the team lacked this greater perspective that could greatly improve the quality of their work. With these goals in mind, my supervisor wanted me to help create this documentation with as much creative freedom as possible.

Personal Goals

Before beginning the major project of my internship, I did some self-reflection and mapped out what I hoped to gain from my experience working for J.B. Hunt in the corporate finance and accounting department. I was able to pinpoint three major goals that I strived to accomplish by the end of my time with the team, and I carefully examined how I could proactively work towards bettering myself within these three areas. This allowed me to have a more focused, intentional internship experience at J.B. Hunt.

The first learning objective that I identified centered around communication. The past couple of years have significantly altered how we communicate with others. However, with a hybrid experience this summer, I knew that I would have room to grow in both face-to-face and virtual communication. Because this was my first experience in a corporate environment, I wanted to improve my professional communication skills and learn the most efficient and effective ways to communicate in the workplace. When working face-to-face, I wanted to specifically gain experience on the best way to professionally communicate with not only team members but also supervisors and executives. With the presence of face coverings and social distancing as a result of the pandemic, I knew that strong verbal communication face-to-face was all the more important. Along with verbal communication, I wanted to improve my written communication skills. As this was my first internship, I felt as though I had room to grow in my professional written communication skills, whether that be through email or through instant chatting. I had established a sub-goal to better learn, understand, and implement common corporate email and messaging lingo and style by the end of my internship, as this is a skill that is versatile and prevalent within all post-grad corporate careers. Communication, especially in such data driven fields like finance and accounting, is crucial. It is vital that everyone is aware of what is going both internally and externally, and without proper communication, this would be impossible to accomplish.

The next key learning objective that I established at the beginning of my internship was to gain a better understanding as to what process documentation is and its relevance and use in the workplace. When interviewing for this position, my supervisor gave me a brief overview as to what process documentation was and why it was important to establish a database in his team, but I had no prior knowledge of working with or creating documentation. I knew that I had a lot to learn about how documentation can be useful in the workplace, and so I made it a goal of mine to gain as much knowledge as possible to take with me in the future. From the prior knowledge my boss had already given me, I knew that documentation was a resource that is necessary in multiple departments and facets within a workplace, so the experience that I would gain learning about documentation would be applicable to a large variety of career paths that I might pursue in the future.

The last goal that I identified prior to starting my internship was the idea of being able to better problem solve and adapt to unique situations. Because my team focused primarily on accounting processes and tasks, I knew that several of the topics that I would be working on through the process of creating documentation would contain material that was completely new to me. While the scope of my internship did not involve learning and completing these tasks independently, I still had to properly document them and follow along in a fast-paced working environment. I have not been in many situations where the work that I was doing was completely new to me, and I wanted to challenge myself to take on this role by learning to become more adaptive to my environment and persevere through the challenges of working on processes that I might not have been exposed to in a classroom setting. The skills of perseverance and problem solving are qualities that I can take with me through any career or experience that I might face in the future, and I wanted to grow my skills through my internship at J.B. Hunt.

Research

After our initial meetings discussing the problems faced by the team in the finance and accounting department I did not know much about documentation, so I had some background learning to do before beginning on the actual project. The first week of the internship, my manager gave me time to get familiar with documentation in itself by doing self-conducted research on topics including the terminology of documentation, examples of documentation, and various styles of documentation from different managers around the company.

I spent one of my first days of the internship speaking with the VP of internal audit at J.B. Hunt, and he showed me firsthand how the internal audit department utilizes process documentation to store their tasks and the methods they use to organize their documentation. They use several flow charts on a large database called W-Desk, which he even allowed me to access to learn more about the server and how I could potentially use it for my own project within the finance and accounting department. This also allowed me to carefully examine the work that they have done and look at the settings, features, and tools that they used to create their documentation.

Next, I spoke with an individual who was a director in the IT department, and he explained to me all of the technical terminology of documentation. He showed me examples of both visual/graphic and narrative styles of documentation, which complimented the self-research that I had done during my initial days of the internship. This helped my understanding of how I could potentially format the documentation that I would later create for the team as well as what would work best for different types of information. He also gave me ideas on how I could potentially partner with his IT team to collaboratively create some documentation if the scope of my work was beyond my own technical capabilities.

Finally, I spoke with a member of an individual from the continuity team, and she spoke to me about the importance and meaning behind documentation. With COVID-19, documentation became all the more important with the large shift from fully in-person work to work from home. Without direct access to material found in the office as well as the lack of in-person communication, it would be difficult to successfully complete work in a remote setting without strong documentation in place to reference. Her advice assisted in my understanding of the true meaning of the work I was doing and encouraged me to find the best solution possible for the team to make a difference in their quality of work.

With all of this knowledge now in my back pocket, I was able to report back to my supervisor with what I had learned. He expressed to me how he wanted this project to give me complete creative freedom, so we discussed the possible routes that we could take in terms of creating the documentation. We had several decisions to make regarding the type of documentation we would create, where we would store the documentation, how the documentation would be organized, who would have access to the documentation, and how the documentation would be able to be continually updated throughout time for changing needs of the team. We took time and fully thought out each route that we could take and incorporated the research that I had done as well as the knowledge that I had received speaking with experts on documentation within the company. This process took several brainstorming meetings with my supervisor, as we wanted to ensure that we were making the best decision that would positively impact all of those who would be using the documentation.

Finalized Idea

After working with my supervisor and examining several methods of creating and storing the process documentation, we decided to use SharePoint through Microsoft to store the documentation for the team. There were several reasons that we decided to use SharePoint as opposed to other databases, including W-Desk and Amazon WorkDocs. We conducted a thorough analysis of each option, as shown in Figure 1, and decided that SharePoint made the most sense given the scope of our project. The first reason we thought that SharePoint was the most practical solution in that it would be easy for the team to have access to the database, as the team already used other Microsoft products on a daily basis. Because the team already had experience navigating Microsoft technology and already had accounts established with connected work emails, it would be easiest for them to get acclimated to the new documentation database. Because this whole database was created for their use to complement the work that they already do, it was vital for us to come up with a solution that best fit their needs. Additionally, because J.B. Hunt already had a contract in place for all Microsoft products, the SharePoint platform was already free for us to use. Some of the other platforms that we considered had memberships that went as high as several hundred dollars per year, which would require permission for funding. We decided that because SharePoint would not require any additional budgeting or pre-approval, it would be the quickest and easiest to implement. Finally, SharePoint allowed us to most easily share the information with the team. SharePoint allows users to connect pre-existing Office 365 groups to its platform, and since we already had a corporate finance and accounting team established, it would be simple to begin to create a database under this group, ensuring the privacy of the information we were storing. While we decided to keep the contents of the database only directly visible to the members of the accounting and finance team, we wanted to have the option to potentially expand the contents of the database to external teams. With SharePoint, the process of adding individuals to the group via their work email would be simple and instantaneous.

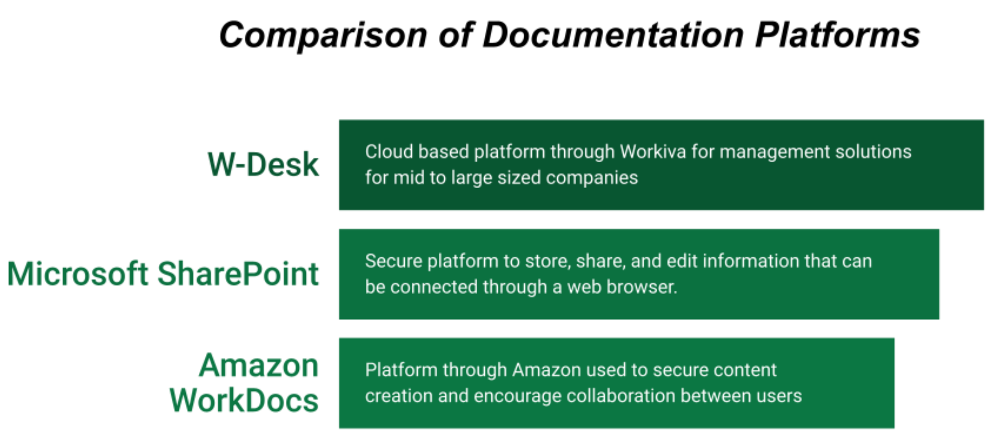

Figure 1: Comparison of Documentation Platforms

After we established SharePoint as our primary documentation database, we experimented with several documentation format options. There were two major routes that I could take to document the team's tasks: narrative and pictorial. The narrative style of documentation utilizes documents and has a long-style written format, while the pictorial style of documentation incorporates different visuals, most commonly flow charts, to express the content. To get a grasp on pictorial documentation, I created mock documentation on Visio, a popular flowchart program, to learn how to create flowcharts with different formats and styles. Most of the executives that I spoke to from the external teams during my research recommended the pictorial style, as many individuals find visual documentation easier to read. However, after speaking with my supervisor, he felt as though the processes that I would be documenting would be best suited for narrative style documentation. This was due to the fact that the tasks in the accounting and finance team were step oriented and did not have different outcomes or paths that could be taken during the completion of the task. For this reason, he felt that flow charts and visuals would not add much to the understanding of the documentation. With this in mind, I decided that it would make the most sense to use Word to create the documentation for each task, since it was another Microsoft product and could be easily linked to the SharePoint database. With these major decisions finalized, I was ready to move on to the creation of the documentation.

Data Gathering and Implementation

To begin the process of the creation of the documentation database, I needed to speak directly with each member of the team so they could walk me through their processes. To begin, I prepared a thorough spreadsheet to help organize the notes that I would take with the team members. Prior to my meetings, every member of the team sent me a list of all of their month-end closing tasks that included the name of the task and the day of close that the task needed to be completed. I took all of this information and imputed it into the spreadsheet to organize it. Once all of this information was categorized, I began to plan out how I was going to conduct the meetings and what information I wanted to gather from each process. Aside from the steps of the process, I wanted to ask the members of the team what the purpose of their process was, what checks they have in place to ensure the accuracy of their work, how similar the process was each time it was completed, and how often both the internal and external auditors asked them to walk through their process. These questions helped to create a more holistic view of the work that they were doing to create more precise and thorough documentation. Additionally, I felt that these questions might help the team think deeply about each task they were doing and potentially have them self-reflect on the meaning and the importance of their work. Along with the process itself, I wanted to gather more information on the categories of each process. After working with my manager, we came up with four major categories of processes: reconciliation, reports, tasks, and calculations. Additionally, we had two major sub-departments in the accounting and finance team that we wanted to categorize each process by: corporate accounting and fixed assets, as shown in Figure 2. These major categories would help organize the database and help the team find specific tasks while browsing SharePoint.

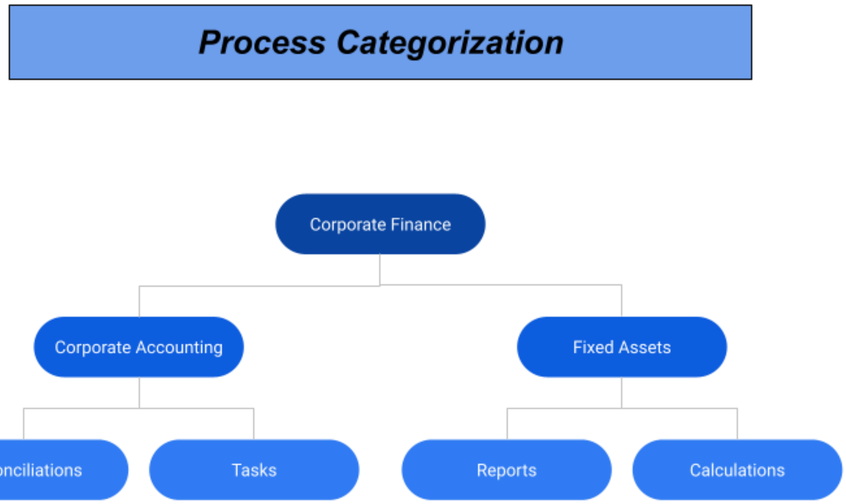

Figure 2: Process Categorization Chart

Once my spreadsheet was set up, I set up the meetings with each member of the team. To begin my process to document all the team's tasks, I first spoke with a member of the team who had the most experience in the department and had begun to move up to a more managerial role, as she was the most familiar with her tasks. Because of the hybrid nature of the work environment this summer, our meeting was done through Microsoft Teams. Instead of walking me through her work verbally, she decided to share her screen and show me exactly what she was doing. All of her processes were done on Workday, and she was able to mock her tasks through a service through Workday called Sandbox. Sandbox allows users to test functions without causing real problems or having real results. This tool was helpful while walking through the processes as the members of the team could walk me through the tasks like they work on them as they normally do during month-end closing week without accidentally submitting a report or reconciliation that could potentially cause problems.

After I finished speaking with the first member of the team, I worked my way through speaking with the rest of the members about their processes. After gathering my results, I went through and picked out all of the questions that the team wasn't able to answer for each of their processes. I found a trend that many of them did not know the checkpoints in place for their processes, and they did not know how to check the accuracy of the work they were doing. I gave this information to my manager, and he determined that there needed to be more informational sessions in place between each team member and himself to help with the education of how to confirm the validity of their work through the creation or recognition of checkpoints. In the meantime, he helped me fill in the gaps that I was unable to gather from the team and gave me the last pieces of information I needed before beginning the process of creating the SharePoint database and creating Word documents for each process.

The experience that I had working with each member of the team was extremely positive. They were all kind and patient with me as I worked through processes with terminology that I was unfamiliar with, and they were always willing to answer my questions regarding any topics that confused me. Through these meetings, I feel that I was able to take initiative and grow my leadership skills through the organization and management of each meeting.

The Creation of the Final Product

Once I completed all of the sections on my Excel spreadsheet covering the information from my meetings with the team, I began to build the SharePoint database. Before beginning the structure of the database, I created a Corporate Finance group through Microsoft Teams that combined both the Fixed Assets and Corporate Accounting subgroups in the team. Then, I linked the Teams group to SharePoint to ensure that my manager and everyone else on the team would have access to the database.

Once I had the database shared, I began structuring the layout of the database. I determined that I wanted all of the tasks to be visible on one screen, so I decided that it would be best to have column headings on the top covering the major categorical sections with 200+ rows underneath representing every process that the team works on throughout the month-end closing week. The headings that I decided were the most vital to display in the top column were "Name of Process", "Corporate Finance Category", "Sub-Category", "Process Type", "Day of Close Completed", and "Person Responsible", as shown in Figure 3. After these titles were displayed, I began filling in all of the categories from the team within the rows, which took over a week alone. Because there were so many tasks and so much organization involved within this part of the documentation, it took me a while to ensure that I had labeled and categorized everything correctly.

Name of Process	Corporate Finance Category	Process Sub-Category	Process Type	Day of Close Completed	Person Responsible
Process 1					
Process 2					
Process 3					
Process 4					

Figure 3: SharePoint Layout Example

After the completion of the structure of the database, I started the process of creating a Word document for each month-end closing task for the team. In each document, I included the steps of the process, an explanation as to the purpose of the process, an idea of how often the process was audited, and a guide as to how to verify the accuracy of the process. This additional information was put in place to hopefully increase the transparency of each process, a problem that my manager wanted to solve at the beginning of the internship. Throughout the process of creating each document, I often had to communicate with the members of the team for clarification on certain steps/concepts, and they were more than willing to help fill in any gaps that I had after our main meetings. In the future, my supervisor expressed his hopes of potentially having the team take photos of certain steps in their tasks to add more visuals within the documentation, and he stated that those would be the next steps that they strive to take after my internship ended.

Along with the documentation database, I began the creation of an interactive Excel spreadsheet that was attached to SharePoint. The goal of this Excel spreadsheet was to once again increase the transparency and cohesion of the work of the team, and it was meant to assist in the communication of every individual's progress throughout the month end close. The first worksheet consisted of a list with every person's processes along with the day of close that the tasks were completed. Additionally, there was a worksheet dedicated to each member of the team with their individual tasks, along with the several categorizations of each task. I created advanced pivot tables and slicers for each worksheet so the processes could be easily filtered by the different categories. Lastly, the spreadsheet had a built-in capability to update when a task was completed. For example, if a team member went on their personal worksheet and marked that they completed a task, this would automatically update on the main worksheet containing all the processes combined. This was put into place to assist my manager, along with the rest of the team, in their awareness of the status of their work.

After explaining the capabilities of the database and the interactive Excel spreadsheet, my team and manager felt as though this documentation would assist the accounting and finance department immensely in their month-end closing work. I was excited to see that my work would have a positive impact on the team, as this was the main objective of my project. I had time to answer questions that they had about the database and Excel spreadsheet, and they were able to pilot the database towards the end of my internship. Overall, I received feedback, and I was delighted to see the work of my internship being put to use.

Revisiting My Goals

At the end of my internship, I reflected upon the goals that I set for myself at the beginning of the summer to determine whether I felt that I had met them throughout my time working with the finance and accounting team and if I had adequately met them. After looking at the work that I had done over the summer and fall, I felt as though I had made big leaps within the areas that I had wanted to improve upon and fulfilled all three of my goals.

The first goal that I established was centered upon the improvement of my overall communication in the workplace. While I had a hybrid experience and was primarily online for most of my internship, I was still able to learn how to be intentional with my communication and worked with the resources provided to be a thoughtful and effective communicator with my supervisor, team, and the other executives that I worked with. The main way in which I improved my communication skills was through the meetings that I led with the team. During this time, I learned how to ask clear and direct questions, which was a skill that I had never used before. Because the note-taking process was extremely detail-oriented, I was required to ask several questions, both for the improvement of my own understanding and for the sake of the documentation, to have the information that I needed to move forward. This helped me learn how to be more assertive and straight-forward, something that I had always struggled with in the past. Additionally, I had to send several emails to individuals both within my team and externally, and I quickly learned proper email etiquette and the level of professionalism required when communicating virtually in the workplace. These skills will be relevant to me going forward, so I was grateful for the opportunity to improve my communication during this internship.

The second objective that I identified at the beginning of my internship was to gain more knowledge about the purpose and use of process documentation in the workplace. I targeted this goal during the research period of my internship. I took this time to learn as much as possible about process documentation from different teams and perspectives, and I now have a strong knowledge in a topic that I did not have before the internship began. During my time at J.B. Hunt, I was introduced to several different database types, including W-Desk and SharePoint. Additionally, I experimented with both narrative and visual style documentation, using programs such as Word and Visio. Because I was given the initiative to experiment and test out different methods, I was able to gain a greater perspective on the ways documentation can be presented. Overall, I am satisfied with my current knowledge in documentation and feel confident that I met my goal through my experience as an intern.

The third goal that I established prior to beginning my internship was about becoming a better problem solver and learning how to better adapt to unique situations. Throughout my internship, I had to adapt to the fact that I was not extremely knowledgeable in the technical accounting processes that the team did. Because of this, I had to learn how to adapt to the new material that I was working with and quickly problem solve and figure out the best way to document processes that I did not fully understand. Instead of giving up, I asked questions, did research, and reviewed material continuously to provide the best possible documentation. Through this experience, I feel as though my problem-solving skills improved immensely, and I am now more equipped to tackle unique and difficult situations in the future.

Conclusion

In conclusion, this internship at J.B. Hunt in the accounting and finance department was very hands-on, informational, and allowed me to gain experience in the workforce in finance with a reputable and successful company. The internship truly supported my education through the Walton College of Business and taught me not only about documentation within finance and accounting, but also about financial processes within month-end close that the department completes. I thoroughly enjoyed the opportunity to create a process documentation database from scratch and taking the initiative to lead conversations and give my input on major decisions. Even though I was a temporary intern, I was given a large amount of creative freedom that gave me the opportunity to learn even more through self-led research. During my time as an intern at J.B. Hunt, I was able to improve my communication skills, learn about the meaning of documentation, and adapt to unique situations. Through this internship, I have solidified the fact that I would like to work in the financial realm in the future, and I am thrilled that I will have this experience to take with me in my future career endeavors. I am extremely grateful for the time that I had at J.B. Hunt, and I am confident that the knowledge that I gained during my internship will carry me far in whatever career path I choose to take after graduation.

Addendum: Journal Entries Throughout the Entirety of my Internship

Journal Entry 1:

In my first week of my finance internship at J.B. Hunt, I have had the opportunity to divulge deep into the overarching topic of process documentation and why it is important in the workplace, especially in the finance and accounting department. To begin the week, my supervisor gave me the daunting task of researching process documentation on my own, taking extensive notes, and bring my findings back to him to discuss what I had learned and if I had any main points that I believed could fit into the scope of my internship and project, without knowing exactly what my project was. After spending several hours on multiple sites, I compiled a document that provided a general view of process documentation, as well as some examples that stuck out to me. Once I presented my findings, my supervisor finally revealed to me the scope and objective of my project. Throughout the internship, he wanted me to create a process documentation database of sorts that would help his finance and accounting department become more consistent, transparent, and efficient. I was able to brainstorm ideas that I had after my initial research and get his perspective on the work that needed to be done and the best way to go about it. He told me that going forward in the next few weeks, he will refer me to other individuals within J.B. Hunt who already has a documentation system established within their departments to get advice on how I could potentially create the documentation for our team.

Journal Entry 2:

This week, I have spoken with numerous individuals who work in J.B. Hunt in different departments about their process documentation and how they went about creating it. First, I spoke to the internal audit team, speaking with both the VP and a director. They both showed me the platform that they use to store documentation, W-Desk. They allowed me access to their server to give me an opportunity to view the format of their documentation and learn how to navigate W-Desk. Next, I spoke with an individual from the IT team, and he explained some of the more technical terms of documentation and shared a presentation that I could potentially use as a resource going forward while creating the documentation. Finally, I spoke with a member of the continuity team at J.B. Hunt, and she explained to me why it is imperative for teams to have cohesive documentation, especially in the midst of a pandemic. The experience of being able to learn from professionals who held lots of knowledge about process documentation was extremely valuable for me this week. I really enjoyed the lessons that I learned, and I was grateful for the opportunity to lead these meetings with seasoned professionals.

Journal Entry 3:

This week of my internship, I began the process of building my process documentation by having interviews with the members of the finance and accounting teams. I started my week with a member of the team who has begun to take on more managerial roles, and she walked me through all of her tasks. Because these interviews took place over Microsoft Teams, we decided to use the screen-sharing feature so she could show me what she was doing on her computer rather than verbally walk me through it. This helped me immensely in my note taking of her processes, as it helped me gather details that I would not have been able to get without directly seeing the steps she was taking. I was given the initiative to ask questions, whether that be to clear up any confusion I might have or make the members of the team do critical thinking on the tasks that they were completing. The member of the team that I worked with this week was kind and patient, and this allowed me to gather the best information possible to put into the documentation that I will create after completing my interviews. Overall, I feel as though I have made great progress on the documentation, and I thoroughly enjoyed working with the whole team and getting to know them better.

Journal Entry 4:

This week, I began to build the documentation database on SharePoint. Firstly, I organized the layout within SharePoint, creating columns for the name of the individual responsible for the process, the process type, the day of close the process is done, the sub-category, and the attached Word document. Then, I began to input all of the information into these columns, which became tiresome, as there are over 200 tasks that need to be documented. Once I completed inputting all of the information, I began the process of creating a word document for every single process. While I was unable to finish that this week, I developed an organized method to organize the documentation. Firstly, I had the steps of each process listed. Then, I had a section that detailed the reasoning as to why the process exists. Finally, I had a section at the bottom that described the checkpoints that can be used to confirm the validity of the work being done for the process. This layout will help me go forward to document each task with consistency.

Journal Entry 5:

This week was the final week of my internship. To conclude my time with J.B. Hunt, I reviewed the process documentation database that I had created and edited the documents one last time. I had a meeting with the accounting and finance team, my supervisor, and other executives that work closely with the team to share a presentation that I made about my project so that they could understand the work that I had done. This was a great time for me to answer any questions about the database so that it would be easy for everyone to use. Overall, the feedback that I received about the process documentation was extremely positive, and I was excited to see that my work would have some real use in the work that the team did. To conclude my week, my manager shared with me that J.B. Hunt was in the process of changing their external auditors, and he told me that my process documentation database would come in handy while walking the new auditors through the work of the team.

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