

Discovery Conference 2008

# Business Process Improvement



# Food for Thought

- It's not the strongest of species that survive, nor the most intelligent, but the most adaptable to change”  
*Charles Darwin*

- Breakdowns in a company's management system, not managers' lack of ability or effort, are what cause a company's underperformance.

*Kaplan & Norton, Harvard Business Review January 2008.*

# About IServices

- Melbourne based consulting company specialising in information management, technology planning and coaching
- Although we are technology independent we have been supporting iMIS clients for over 5 years
- Offering wide range of services
- Business focused



# About Me

- Over 20 years in Member based organisations,
- 13 years in Not for Profit organisations
- Have been working with iMIS over 4 years
- Passion
  - development of processes and procedures
  - quality assurance in clerical work
- At IServices, I help clients
  - manage their iMIS rollout
  - achieve best practice processes

# Business Case – BPI

- Understand “how you do business”
- Reduce inefficiencies and errors
- Find & eliminate cumbersome processes
- The need to decrease process costs and increase efficiency

# Business Case – BPI

- Assist staff who are
  - confused by a complex process; or
  - frustrated by an inefficient process.
- Retain knowledge
- Train new staff efficiently

# Business Case – BPI

- The inability to upgrade due to a lack of understanding of the related business processes
- The desire to have best practices in the workplace

# Business Case – BPI

- To better serve customers
- Improve ability to anticipate manage and respond to changes
- Maximise business opportunities
- The need to be more competitive in the marketplace

# Process Improvement Lifecycle

- Equal importance
- Lifecycle is continuous
- Future iterations ensures processes don't become
  - inefficient,
  - cumbersome or
  - ineffective

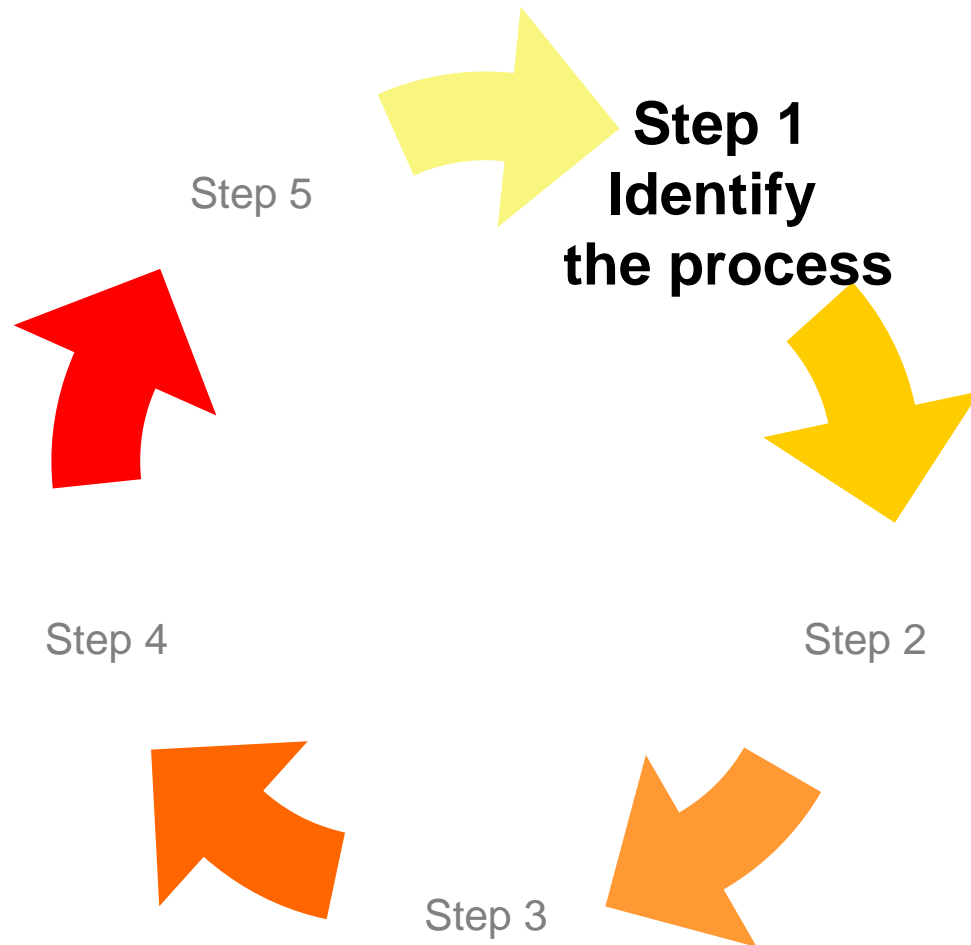
# Who's Involved

- Champions – STAFF
  - Line Managers
    - Mix of departments
      - Senior Management

# How

- Identifying business processes
- Documenting the processes
- Performing process analysis and measurement
- Creating process improvements
- Performing ongoing process management

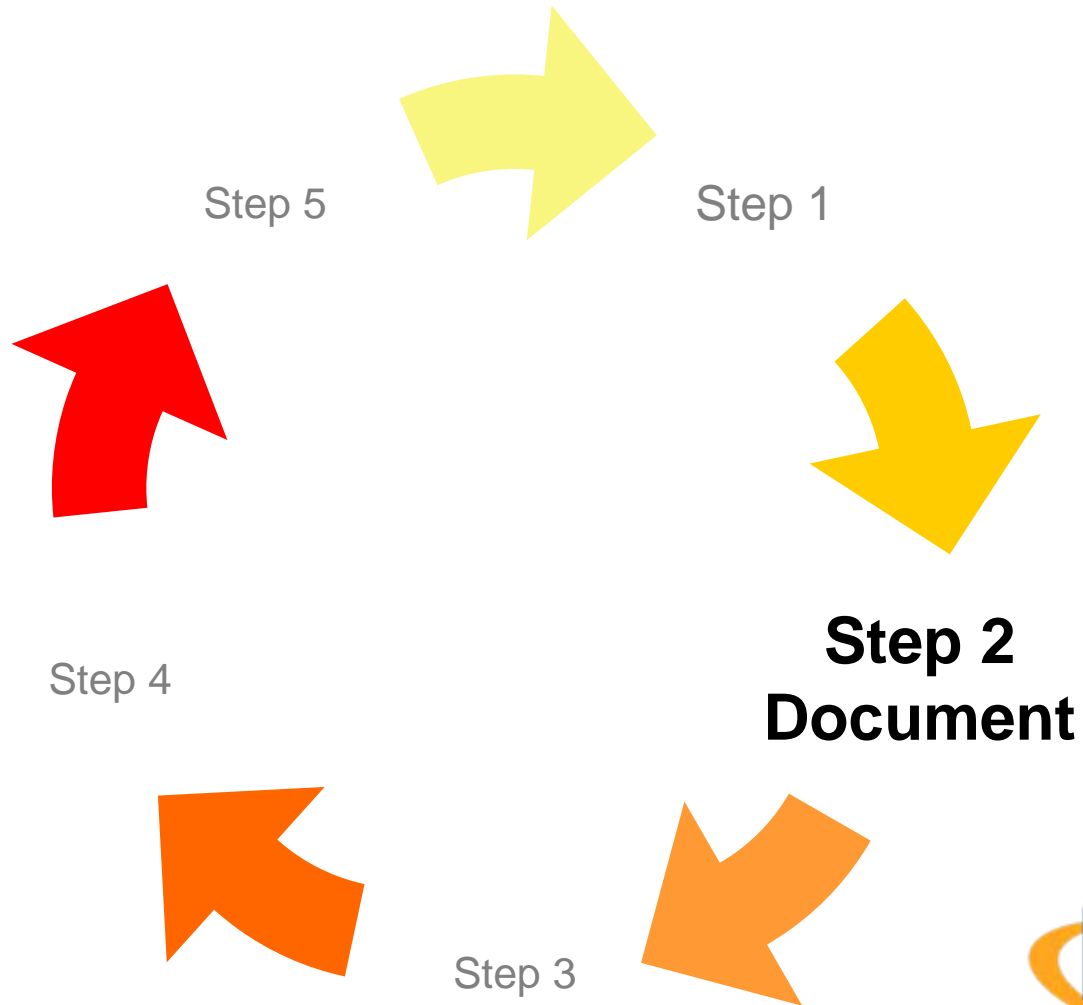
# Step 1 – Identify the process



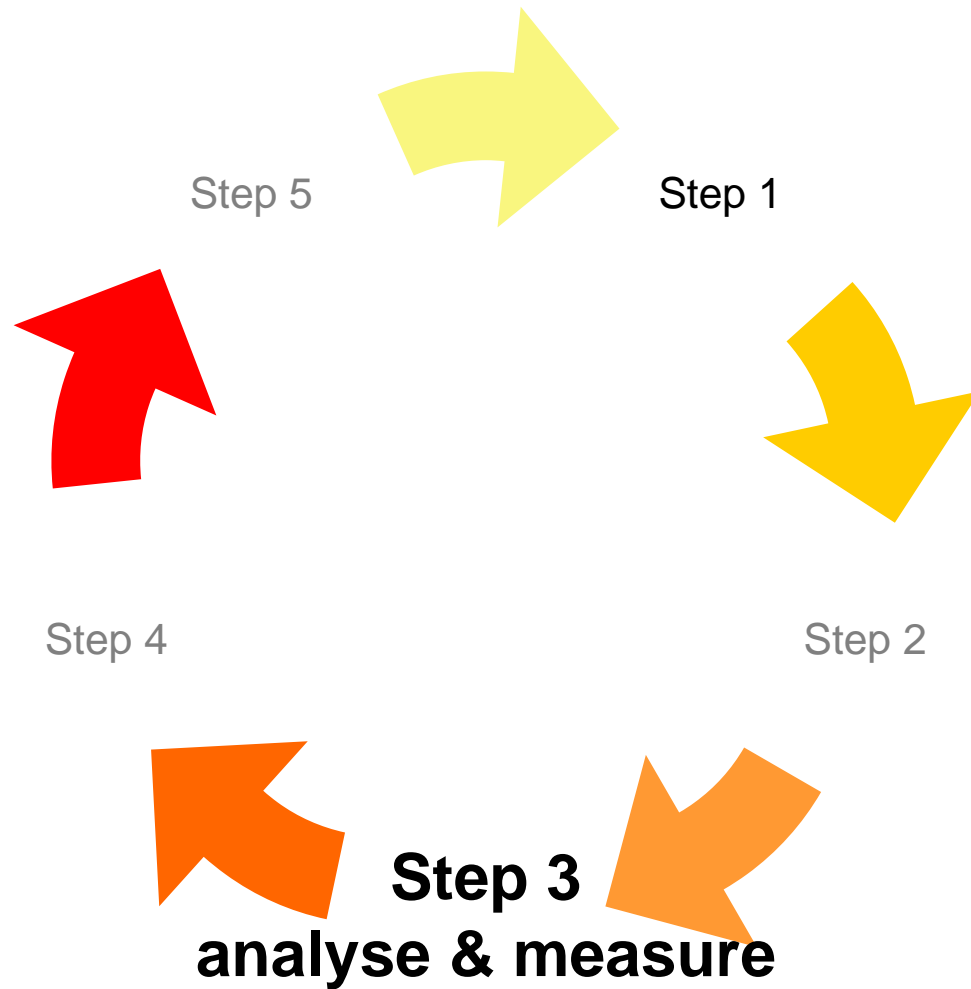
# Case Study

- Small Not for Profit
- iMIS implemented 2 years ago
- Staff member who knew all about iMIS has just left
- New staff person transferred from another department – has had 2 days handover and was trained in iMIS when it was initially set up
- A photocopy of handwritten notes that the original person was provided

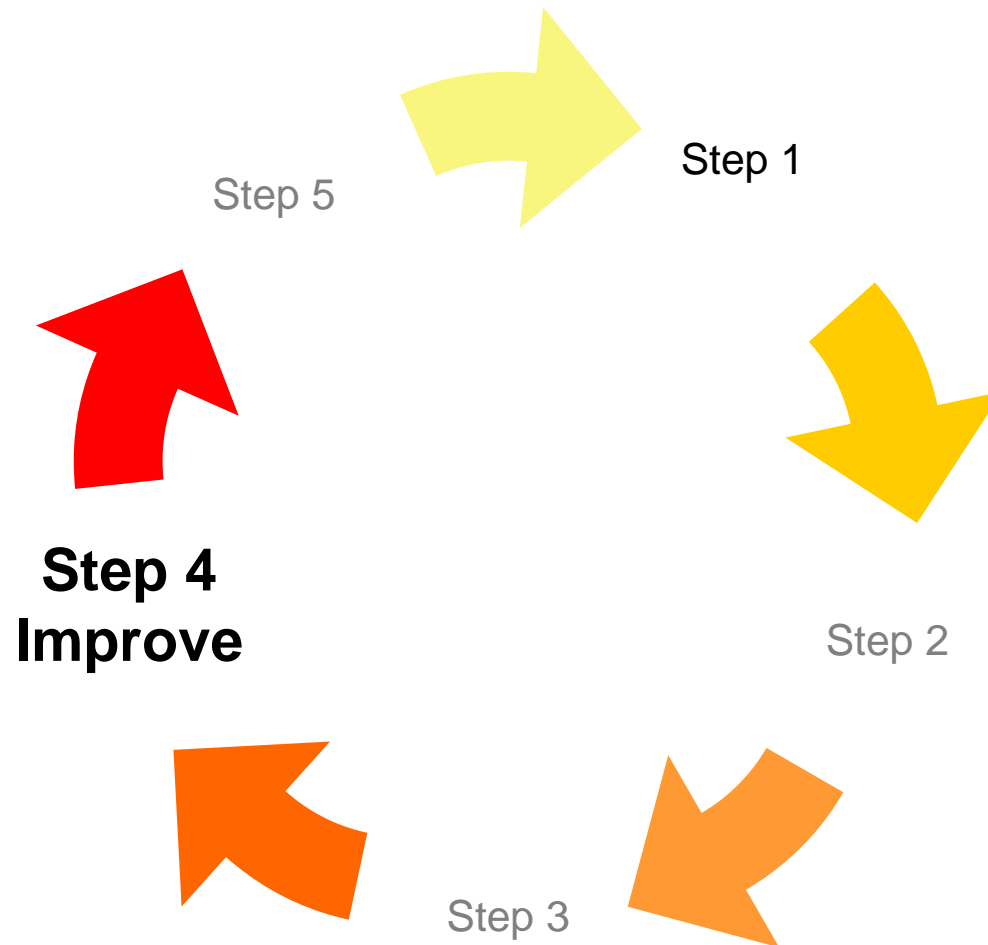
# Step 2 – Document



# Step 3 - Analyse and measure



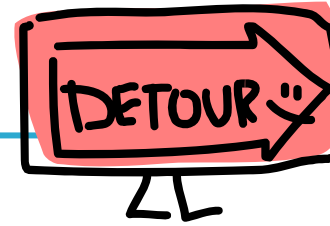
# Step 4 - Improve



# Step 5 – Manage / review

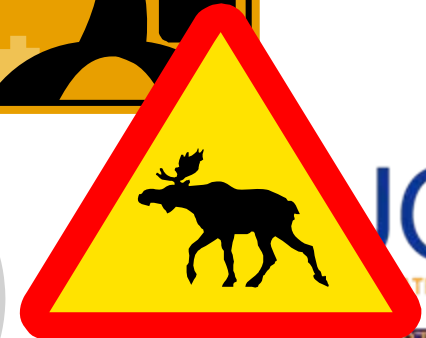
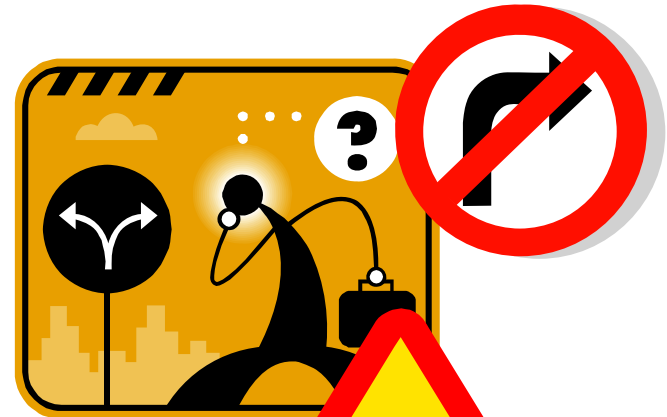


# Obstacles



- Lack of management commitment and leadership
- Unrealistic scope and expectations
- Lack of objectivity
- Resource change
- Poor communication
- Limiting involvement

E6	E20	E22
MALMÖ	10	
STOCKHOLM	640	
GÖTEBORG	290	
OSLO	591	



What else will be needed

COMMITMENT  
PERSISTENCE

# What Next – Work through the Cycle

- Select a process
- Get the staff involve to write down what they do
- Get them to monitor how long it takes
- Analyse & Review the results
- What improvements can be made?
- Implement that changes
- Set a time to review the new process

# Hints & Tips

- Use Font, Bold and Underline to emphasis information
  - **Headers**
    - Instructions
      - Key Stokes
- Keep processes to one page
- Use cropper – screen grabs



# Learning Styles

## Visual

- learn by seeing and reading

## ■ Auditory –

- learn by listening and speaking

## ■ Kinesthetic /Practical –

- learn by touching and doing

# Tools – Hand Written

# Tools – Spreadsheet

Step	Name	Owner	Status	Description	Average Time (days)	Average Cost	Inputs	Outputs
1.1	Handle Request	Service Sales Representative	Inactive	Receive and process a service request from a customer	2	\$100	Initial customer request	Tracking number, Customer request summary, Detailed information form submitted to customer
2.1	Assess Technical Feasibility	Service Sales Representative	Inactive	Create estimates of technical difficulty and resource needs	3	\$500	Customer request summary	Technical feasibility assessment
2.2	Assess Financial Impact	Service Sales Representative	Inactive	Create financial estimates about the customer and the service request	5	\$500	Customer request summary	Financial impact assessment
2.3	Qualify Request	Service Sales Representative	Inactive	Determine whether the service request should be accepted	2	\$750	Customer detailed information form, Technical feasibility assessment, Financial impact assessment	Bid decision
3.1	Architect Solution	Project Manager	Improving	Create a solution architecture that defines how the job will be delivered	5	\$2,500	Customer detailed information form, Technical feasibility assessment	Architecture plan
3.2	Create Proposal	Project Manager	Investigating	Create a project plan that details the time, resources and costs to deliver the job	3	\$1,000	Customer detailed information form, Technical feasibility assessment	Statement of work, Project plan
4.1	Negotiate Bid	Service Sales Representative	Investigating	Submit the plans to the customer and negotiate job scope and cost	10	\$1,000	Architecture plan, Statement of work, Project plan	Updated architecture plan, Updated statement of work, Updated project plan, Signed contract, Purchase
5.1	Develop Solution	Development Team	Inactive	Develop the contracted work			Updated architecture plan, Updated statement of work, Updated project	Completed job
6.1	Review	Project Manager	Improving	Review the completed work to ensure the customer is satisfied	6	\$1,750	Completed job	Customer sign-off
6.2	Complete Engagement	Service Sales Representative	Inactive	Finalize payment	3	\$150	Customer sign-off	None

# Tools - Visio

Process Improvement Project: Customer Engagement Workflow

The flowchart illustrates the following process flow:

- Sales Representative:** 1.1 Handle Request (Inactive, 2 days) → 2.1 Assess Technical Feasibility (Inactive, 3 days) → 2.2 Assess Financial Impact (Inactive, 5 days) → 2.3 Qualify Request (Inactive, 2 days) → 4.1 Negotiate Bid (Investigating, 10 days) → 6.2 Complete Engagement (Inactive, 3 days)
- Project Manager:** 3.1 Architect Solution (Improving, 5 days) → 3.2 Create Proposal (Investigating, 3 days) → 6.1 Review (Improving, 6 days)
- Development Team:** 5.1 Develop Solution (Inactive)

Inputs and Outputs for key steps:

- 3.1 Architect Solution:** Inputs: Customer detailed information form, Technical feasibility assessment; Output: Architecture plan
- 6.1 Review:** Input: Completed job; Output: Customer sign-off

Name	Owner	Status	Description	A...	A...	Inputs	Outputs
1.1 Handle Request	Service Sales Represe...	Inactive	Receive an...	2	1...	Initial customer request	Tracking number, Customer request summary
2.1 Assess Technical Feasibility	Service Sales Represe...	Inactive	Create esti...	3	5...	Customer request summary	Technical feasibility assessment
2.2 Assess Financial Impact	Service Sales Represe...	Inactive	Create fina...	5	5...	Customer request summary	Financial impact assessment
2.3 Qualify Request	Service Sales Represe...	Inactive	Determine ...	2	7...	Customer detailed information form, Technical feasibility assessment, Financial impact assessment	Bid decision
3.1 Architect Solution	Project Manager	Improving	Create a so...	5	2...	Customer detailed information form, Technical feasibility assessment	Architecture plan
3.2 Create Proposal	Project Manager	Investigating	Create a pr...	3	1...	Customer detailed information form, Technical feasibility assessment	Statement of work, Project plan
4.1 Negotiate Bid	Service Sales Represe...	Investigating	Submit the ...	10	1...	Architecture plan, Statement of work, Project plan	Updated architecture plan, Updated statemen
5.1 Develop Solution	Development Team	Inactive	Develop th...			Updated architecture plan, Updated statement of work, Updated project plan	Completed job
6.1 Review	Project Manager	Improving	Review the ...	6	1...	Completed job	Customer sign-off
6.2 Complete Engagement	Service Sales Represe...	Inactive	Finalize...	2	1...	Customer sign-off	None

Workflow

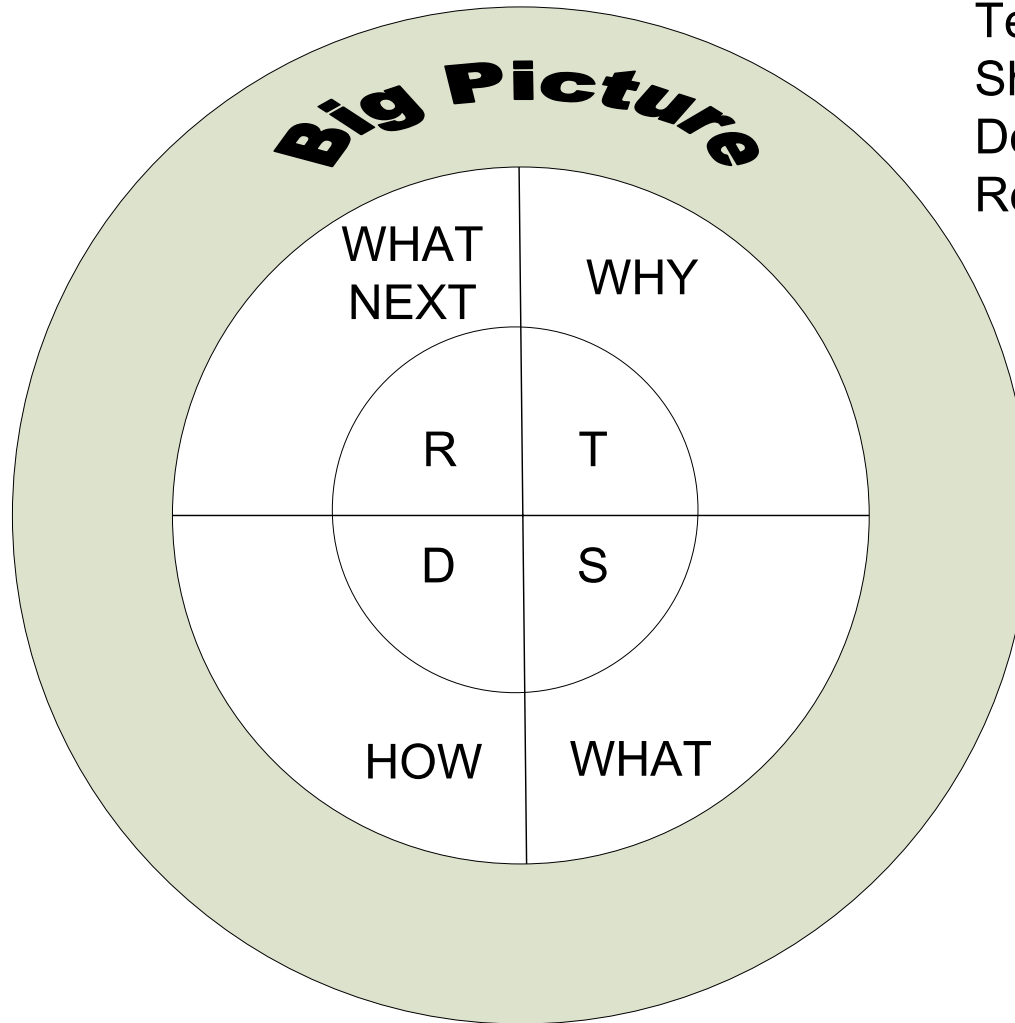
Start | Process Improvement... | Microsoft PowerPoint - [...]

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# Hints on Training

Adult  
Learning

Tell  
Show  
Do  
Review



# Snapping Dragon

# IServices

- What we can do
  - Review your current Business Processes
  - Prepare the documentation
  - Provide Training
    - New staff
    - Existing staff

# Any questions?

