

# Business Process Management

## Outline of project steps

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# 1 Introduction

Sensitive cost reductions made through improving processes, removing unnecessary activities and re-balancing resources into areas of risk and to improve service levels requires a disciplined approach, effective tools and techniques of analysis and the co-operation and involvement of the people doing the work in the organisation.

This document outlines the main worksteps of the BPM approach.

## 2 Objectives and scope

### Objectives

Business Process Management (BPM) projects are designed to improve business processes.

The key objectives are

- to change methods and processes;
- to address any service level issues that exist.
- to ensure appropriate systems and IT support;
- to review structural issues and define any new responsibilities and accountabilities where appropriate;

The outcome is a prioritised set of implementation plans to be taken forward by management.

Implementation priorities are set by the management team taking into consideration timing, costs, benefits and any other factors associated with integrating any other initiatives.

### Scope

To be determined by senior management (Ideally, the whole business).

### 3 Approach

The Develin BPM approach is based on achieving an appropriate balance of consulting experience and proven method, coupled with the experience and knowledge of the organisation that exists within a project team and among the managers and staff.

The review will concentrate on developing proposals to make changes to core processes. This phase will involve the team interacting with key managers and staff, rather than every single employee. However, during implementation we would expect more employees to become involved as this assists with the buy-in to changes and speeds implementation.

The BPM approach involves a series of distinct steps with specific outcomes at the end of each step. This ensures that everyone knows where the project is at any time and keeps the project on course to the meet deadlines. Meeting deadlines assumes the commitment and support of the senior team – particularly by releasing their staff to meet the timetable set by the project team.

The project steps will be:

- 1 Interview key senior staff
- 2 Team selection
- 3 Communications
- 4 Team training (The main start of the project)
- 5 Define key processes
- 6 Walk processes
- 7 First team immersion
- 8 Process Review Meetings
- 9 Second team immersion
- 10 Preparation of proposals
- 11 Top team workshop

Depending on the scope of a particular project, some steps may be deleted or amended to suit each circumstance.

The details of each step are as follows.

### **Step 1: Interview key senior staff**

Each member of the senior team will have varying perceptions of what should be changed to meet the final objective. These views will generally be from a functional perspective though they should integrate into an overall view that is consistent.

Ideally, consensus among the management team should occur before the project start up in terms of the project deliverables.

During the course of the project we expect the project team to make interim presentations to the management team based on the outcome of the 'Immersion sessions' at which time major issues will surface. This provides the management team with an opportunity to change the direction of the project, its scope, timing or whatever else may be appropriate at that time.

### **Step 2: Team selection**

An appropriate RBKC team is desirable in order to achieve both a result from the first phase and to act as a bridge to implementation in subsequent phases. The team should be drawn from the major functions represented within the scope.

For a large scope, ideally, the team should be assigned full time to the project. However, it is recognised that where the scope is small or there is significant current workloads then a part time team would be made available.

### **Step 3: Communications**

Communicating to the people in the scope is vital. The objectives should be clearly stated and the involvement of the consultants and the RBKC team members defined. In particular the message should emphasise that this is a RBKC project supported by a method brought by consultants.

It is important that the management team all have the same 'song sheet' and are able to address queries from staff after the main communication of the project has taken place. Previous actions by management may already have raised people's uncertainties about the future. In these conditions, communications is likely to be more about listening to people's fears rather than painting a rosy picture of the future. Good communications will help the team; poor communications will make it difficult for team members to engage key members of staff in designing the future business processes.

### **Step 4: Team training**

Team training will combine transfer of techniques to team members, team building and work to move the project forward.

During this step, team members will be assigned to the processes they will be investigating. Wherever possible, we assign team members to the processes with which they are least familiar: this heightens their curiosity and ensures that they do not stay in the team room assuming they know what goes on.

Team training will also involve detailed project planning, ensuring that the whole team understands their roles and interdependencies.

### **Step 5: Define key processes**

During team training the processes are defined, with their start and end points and the major tasks/activities undertaken. Getting the level of detail right is important – too high and much of the important detail is missed; too low and the key activities disappear in a fog.

From the list of processes, the team together determines the contribution that each function, department or section makes to each process. This creates the link between the normal organisational structure and the new process perspective.

The team then determines who in each department should be involved in subsequent steps of the project. Each process will have a nominated 'cast-of-characters', which collectively represents the functional views of all those that contribute to the process. Individuals can be members of the cast of characters for more than one process.

### **Step 6: Walk processes**

The team members walk their process(es). At each functional/departmental point along the process the team member determines how the process works currently (including all failure loops), identifies issues and problems, notes the current performance measures and, where appropriate, collects high-level activity and process costs.

Process maps will be drawn that will be used during later steps. At this stage the maps will be on large boards using post-it notes so that they can be worked on by interested groups. Process mapping software can be used later for a more permanent record.

### **Step 7: First team immersion**

After the team members have collected the data for each process they are immersed together in order to share what each has found. This exposes the process-to-process issues, and provides a 'helicopter view' of the entire business – warts and all.

At this session the team produce an agreed list of the key issues in each process and, based on the overall objective of the project, develop some of their own ideas to design the processes of the future. They also determine the cast of characters who will attend Process review Meetings during the next project step.

### **Step 8: Process Review Meetings**

The purpose of the Process Review Meetings is to develop a consensus on how the process works, to share the issues the team member has found, and then to generate ideas on redesigning the process to meet the overall objective of the project.

There will be one validation meeting for each core process. The cast of characters will attend the meeting to validate what the team member has found. We often find that these meetings are the first time that all the functions involved in a process meet as a group to discuss the way the process works

After the meeting the outcome is summarised and fed back to each participant.

### **Step 9: Second team immersion**

Once all the Process Review Meetings are completed the team will immerse itself for a second time. Again the process-to-process issues will be debated, but now in the light of the proposals to redesign them all. The team will now develop a helicopter view of how the new processes should look in the future.

### **Step 10: Preparation of proposals**

From the immersion session each team member will be tasked with preparing all the proposals for change within the processes they are studying. Care is taken to ensure that all the proposals hang together from an overall service/organisational perspective.

The preparation of these proposals often requires further research within the organisation to ensure that data is valid and can support conclusions and recommendations. The team members prepare their material to present to the senior management team workshop.

### **Step 11: Senior management team workshop**

At the workshop, each team member will present what they have found during the course of the project, their conclusions and proposals to re-design the processes.

The outcome from the workshop will be a clear definition of the focus and direction the management team wants to implement, including priorities, timescales, resources, broad costs and benefits.

Some of the proposals may require a team of specialists to take them forward; some may depend on development of new systems; some may need further investigation; and some will be rejected.

The team members now change their role to work on detailing the proposals to assist implementation. Some of the team can provide a vital bridge to implementation over an extended period, given they will have a thorough knowledge of what needs to be done, and have established personal contacts and credibility with key managers and staff throughout the processes.

## **4 Roles and resources**

### *Develin & Partners*

Collectively, Develin & Partners bring the experience and expertise required for BPM projects:

- guiding and supporting organisations facing change;
- process design and improvement, and implementation planning;

The consultants will:

- provide the methods, which have been developed and proven in the course of numerous similar exercises for previous clients;
- plan the daily detail of our approach;
- analyse findings and draw conclusions;
- raise emerging issues;
- bring to bear experience of other process re-engineering and change projects;

### *Role of the client team members*

The team members should be drawn from across the scope. They will have two distinct roles to play: the first is working as a team with the consultants through the project steps, providing views and information based on their own experience and that of people within the organisation that are involved in the project.

The second role is to help the consultants learn the organisation – who does what in the structure; background and history; and problems that can be anticipated.

These roles require team members with a collective experience that covers the main areas in the scope and a good working knowledge of the organisation structure and processes.

### *Steering Group*

We recommend that a Steering Group (usually the management team) direct the project. The Steering Group should meet after each Immersion Session and participate at the management workshop (Step 11). Its role will be:

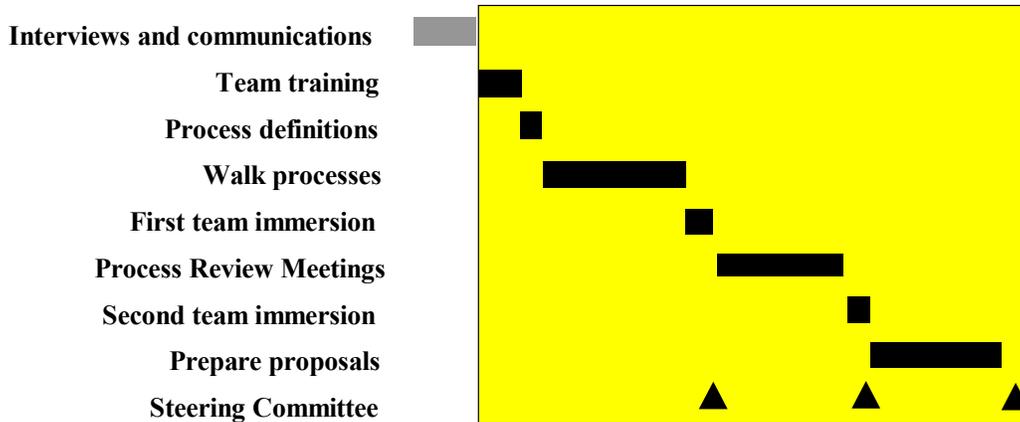
- to determine the project scope and timetable;
- to monitor the project's progress and ensure that necessary resources are available;
- to help overcome obstacles;
- to review emerging results and direct the focus of the project;
- to agree the focus and direction of the implementation planning and detailing of proposals

## 5 Timescale

A typical project timescale is around 12 weeks.

Some differences in the duration of each step will occur depending on people's availability, geographic location and so forth.

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### Develin & Partners

Develin & Partners was formed in 1988, and provides services in:

- Business Process Management;
- Activity Based Cost Management;
- Product and Customer Profitability Analysis;
- Continuous Improvement;
- Change Management;
- Overhead Effectiveness;
- Organisation Strategy;
- Information Systems Strategy.

Develin & Partners' people have between them completed more than 200 assignments in the service areas listed above.

Our consulting approach is based on well-proven and continuously evolving methods, applied to meet the specific needs of clients. We work closely with client staff to ensure that we develop a full understanding of their business, so that we create solutions which genuinely meet their requirements. This is also the best way of ensuring that there is a transfer of skills and knowledge into the client organisation.