# Designing and deploying human centric processes

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*Suggestions for success in human-centric process reengineering projects, by applying best practices in knowledge intensive environments.*

A lot of effort has been carried out in the last years to re engineer processes in order to automate all or parts of them. A great number of companies have changed their processes as a result of the introduction of new software systems, aimed to streamline the management of the back and front office. Companies have even taken care of processes crossing the company boundaries in order to optimize communications with clients, providers and partners. A characteristic of this interest is that is has been driven by technology.

In the last years we have seen the introduction of ERP and CRM systems, Content and Document Management systems, Workflow Automation Applications, etc... that have (or hopefully will) help companies achieve a more efficient use of their resources. It seemed that CIOs believed that an impressive IT portfolio would directly result in better processes.

However less interest has been directed at the human side of process optimization. A lot of money is spent on paying a team from a world class consultancy firm, best of breed software products licenses, etc... and it is usual that the importance of **deploying the new processes effectively** is underestimated. Designing and documenting enhanced processes does not create value for the company. It is only when these new processes are carried out in the real world that value is created.

If we use the popular metaphor that compares a business with an orchestra, you can have the best musicians (employees) playing the best instruments (software systems) with the music scores (processes) in order. Value appears when they start playing together in a coordinated manner.

The objective of most Business Process Reengineering (BPR) projects is to increase the quality of products and services produced, to lower costs, to reduce development time, to increase client satisfaction, etc... At the bottom line what you need to achieve is that people work in a new and more efficient way.

The success of a BPR effort, specially when process are carried out by people, is therefore highly dependent on people's understanding of the following concepts:

## *"Who does what, how, when and where"*

• **Who**. The person in charge of each task in the process must be clear. It must be

clear who is accountable for each activity.
- **What**. The characteristics that the output of the activity must conform to. The value it adds to the process object.
- **How**. The way in which the task must be performed must be clearly known and made explicit (documented) with the necessary level of detail. It is important that this set of descriptions and instructions are easy to update, so best practices and lessons learned can be incorporated and widely employed.
- **When**. Which activities precede and follow the task.
- **Where** the activity is carried out.

The importance of efficiently deploying a process is also Dependant on the number of persons that will be following the procedure. The greater the number is, the more value that an efficient deployment provides. Think of the claim processing department of an insurance company, people analyzing mortgage requests in a commercial bank or a big call center. These units normally have a great number of people executing the same process.

**The objective is that people executing the process perform it as close as possible to the new version of the process, in the shortest possible period of time**. These two variables are extremely important to generate value and to recover the resources invested in reengineering the process.

Some of the practices that can contribute to this objective include making the procedures easily available in a format that facilitates its look up, training, controlling, incentivating process compliance, etc...
But applying this techniques alone is not a synonym for success.

The real challenge is to get participant buy in. These is were social and cultural factors must be taken in to account, and change management, knowledge management, management of expectations, etc... come into play.

Experience has shown, especially with knowledge workers, that involving process participants in decisions that affect them, ensuring that they are well informed and making them feel that their opinion is being taken into account, is more effective than forcing them to follow the new processes. Although there are some cases were strict discipline must be used to enforce compliance with the process, it is usually better to reward good attitudes than to punish non compliance.

Once the process is being carried out following the new process it is also very important to enable feedback to the system. Process participants' opinions are extremely important to enhance the process and it is likely that they have some good ideas to improve it. For example, performing a specific task in a way that can be institutionalized as a best practice, incorporated to the procedure and deployed to every participant in the process.