

# HOW IMPORTANT IS PROCESS MANAGEMENT FOR RETAINING AN ORGANISATION'S "CORPORATE MEMORY" INTO 2022 AND BEYOND?

by Peter K Fraser

Despite what you might expect, Covid has not caused most issues for staff in the organisations surveyed in the recent **"Fixing Process & Knowledge Productivity Problems: Survey Report"** from APQC (<https://www.apqc.org/resource-library/resource-listing/fixing-process-knowledge-productivity-problems-survey-report>). It highlighted that:

## PROCESS GAPS AND PROBLEMS ARE WIDESPREAD

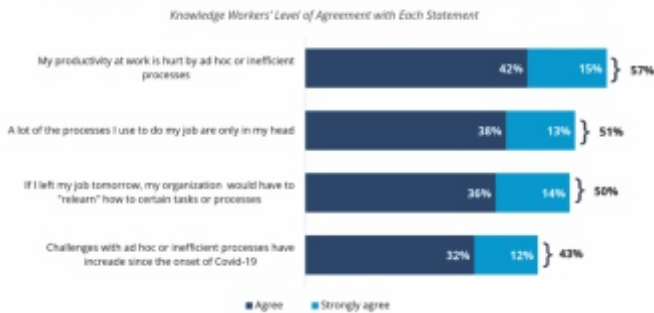


Figure 1

As APQC points out: *"wasted time, duplicated work, and inefficient processes chip away at an organization's bottom line. Small inefficiencies add up - and they can hurt innovation and competitive advantage"*.

## PROCESSES

Although "Working from home" may have required some processes to be modified, and colleagues may have been less available to give advice, the main issue is still that organisations have yet to grasp the problems they are causing themselves by not defining, communicating and managing how they expect work to be done. The new hybrid way of working lends itself to an online management system portal which coordinates process descriptions, role involvements and supporting document information in a structured, easy-to-navigate and searchable system.

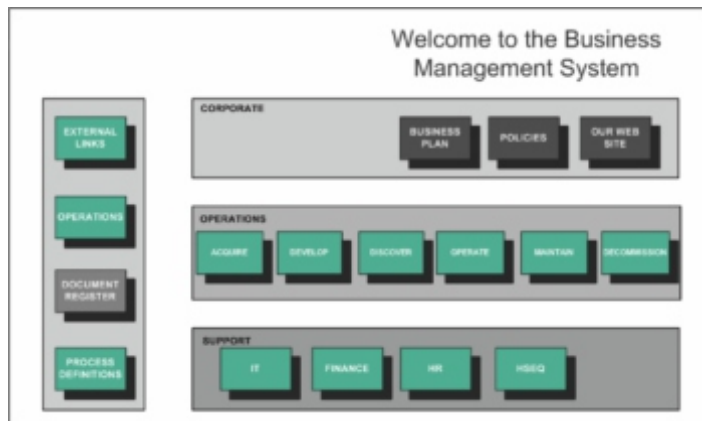


Figure 2: Mandos Software: Sample Online Welcome Page

As organisations plan for coming out of the Covid crisis, it is clear that good process management will remain a key factor in the recovery. Until you are sure about what you are doing now, and how you are doing it, it will be more difficult to make sensible improvements, never mind ensuring that i) new staff can understand the corporate way of working and ii) you can ensure consistency of performance.

Not all processes are what we would call **Mechanistic** (as in a production line), where you want to minimise variation in a physical sequence of tasks. **Transactional** processes (in response to a generic event such as receiving a customer enquiry) - where there is a known set of tasks to be completed but you need to be responsive to the particular circumstances of each instance of the process - need more thought.

Other types are **Developmental** (where you choose to initiate action to create an outcome which is different / better than the last time you did it, such as business planning) where you must do certain tasks, but the sequence may not be relevant, **Reactive** (as in treating a casualty in A&E) where you know your objective, but may not know the tasks or their sequence in advance and **Ongoing** (as in implementing a policy or monitoring progress) where the process affects other processes as they are implemented on an ongoing basis.

They range from the most rigorously defined, controlled and standardised on the one hand to those subject to the greatest individual interpretation and choice. Their objectives can be to minimise variation (and increase profit, minimise cost) at one extreme through satisfying variable customer demand, "adding value" and making a positive contribution to society, to dealing with a unique situation where change is essential.

## 3 ACTIONS THAT MAKE A DIFFERENCE



Figure 3

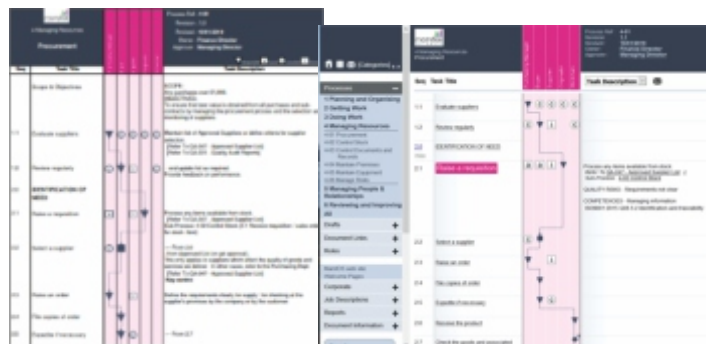
The level of skills and knowledge required varies, as does the detail in the description of the tasks involved. You need to decide the right level of detail when you define your processes – say as little as possible to get the message across.

You need to balance this with the need to encourage staff to make

...continue on page 3

judgements given the circumstances they face. For that you need to ensure that the right staff with the right competence are given the right level of support. “Empowering employees” means giving them the information and freedom they need to do their work, the authority to make decisions and to respond to challenges.

A user needs to be able to scan a process description to see the key steps, but also to be able to drill down easily to the level of detail required to do the job if they haven't done it before, or if it is 6 months before they had to do it the last time.



Our Author software uses a variation of the RACI methodology to define role involvements: who does the task, or makes sure it is done (“**Responsible**”), who else should take a proactive role (“**Assists**”), whose opinion or input might be required, perhaps to provide you with information to complete the task (“**Consulted**”) and who needs to know the result or receive a copy of the output (“**Informed**”).



Figure 4: Mandos Software: Author examples

We believe that the typical “words-in-boxes” format of the traditional flowchart does not provide sufficient detail for someone whose job is to complete a specific task.

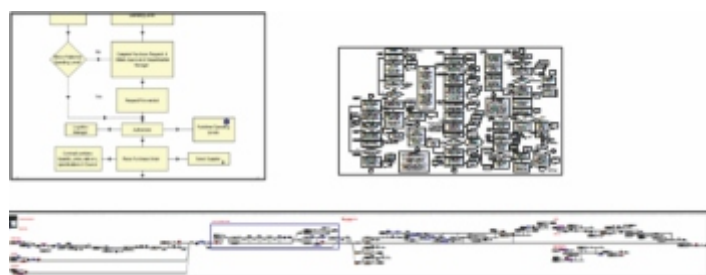


Figure 5: Examples from the Internet

We also struggle with the SIPOC model as a “model” of a process – not only does it dump all inputs and all outputs into their own “buckets” with no indication of the stage at which they are needed or are generated, but it has a box called “Process” which at best is broken down into a few high-level steps. This just does not work as a way to communicate a process in enough detail to ensure consistent and effective delivery of the work.

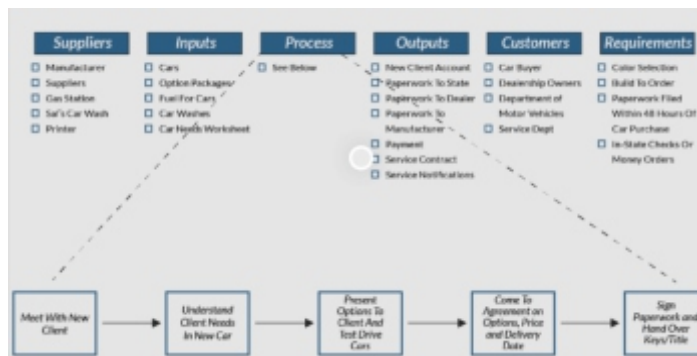


Figure 6: From isixsigma.com

## DOCUMENTS / INFORMATION / KNOWLEDGE MANAGEMENT

With hybrid working now established as a consequence of Covid, organisations need to give all their staff (whether in house or working remotely) access to policies and standards, essential documents, software applications and key process descriptions in enough detail to ensure consistency of delivery. With new and different risks arising because of the new ways of working, the need to highlight these to staff as well as to management becomes more important.

All this needs to be supported by an “Enterprise Search” function which allows a user to find required information easily, whether within the process descriptions themselves or in supporting documents. If your data is held in a database, analysis reports can, for example, easily highlight where specific risks have been identified, how and where standards are addressed and where selected roles overlap.

Ideally, this will be presented in an easy-to-navigate, online, digital portal to allow any user to filter the data so that only those tasks and processes which involve his or her specific role(s), to find a specific process or to find and open a specific document. Even better when a user can select his or her role and get a detailed Role Involvement report online which lets them go straight to individual tasks and processes, rather than having to read narrative procedures to pick out each mention of their role title.

## RISKS

In addition to the obvious risks to the business of not having its processes well defined and communicated, it is important that new staff are aware of possible risks that have been identified and that they know how to manage them. Risks can be to health and safety, the environment, security, process (in a production/manufacturing sense), your reputation, commercial, business as well as the quality of what is produced... For this you need to know who is responsible for carrying out the tasks which carry the risks – and they need to know the risks themselves. So you need to flag the risk for the person doing the work, and for management to manage across the system.

And remember that while a process may have a single task such as “Appoint a Project Manager”, this involves a decision [this is where even the “words-in-boxes” style of presentation would not show a diamond (decision) symbol]. But there is an obvious risk involved!

...continue on page 4

The survey reported an almost identical response to a similar question on the management of knowledge / information in an organisation.



Figure 7

You need to manage the sources of information / knowledge (whether held internally or externally) and make them easily accessible (whether directly or as a link from individual tasks). This can include documents, records, webpages and other files – as well as the process descriptions themselves. If you use a Document Register to hold, or to point to, the supporting information (which can be stored and managed in a variety of formats and sources internally, or can be external eg in the cloud) then users have the best chance to find what they need “at the press of a button (or two!)”.

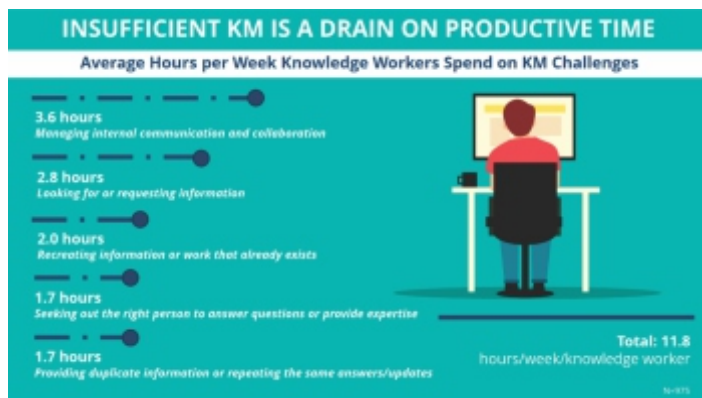


Figure 8

It can be a mistake to try to define your “corporate memory” (what can be lost when key staff move on) in too much detail. Sometimes it is more beneficial to identify who holds the knowledge or experience of certain areas and make that information available to everyone so that they know who to contact rather than having to navigate vast amounts of data.

APQC sum it up very neatly when they say: (See Figure 9)

For the full “Fixing Process & Knowledge Productivity Problems: Survey Report” from APQC, see:

<https://www.apqc.org/resource-library/resource-listing/fixing-process-knowledge-productivity-problems-survey-report>.

[All Figures from the APQC report unless otherwise stated]

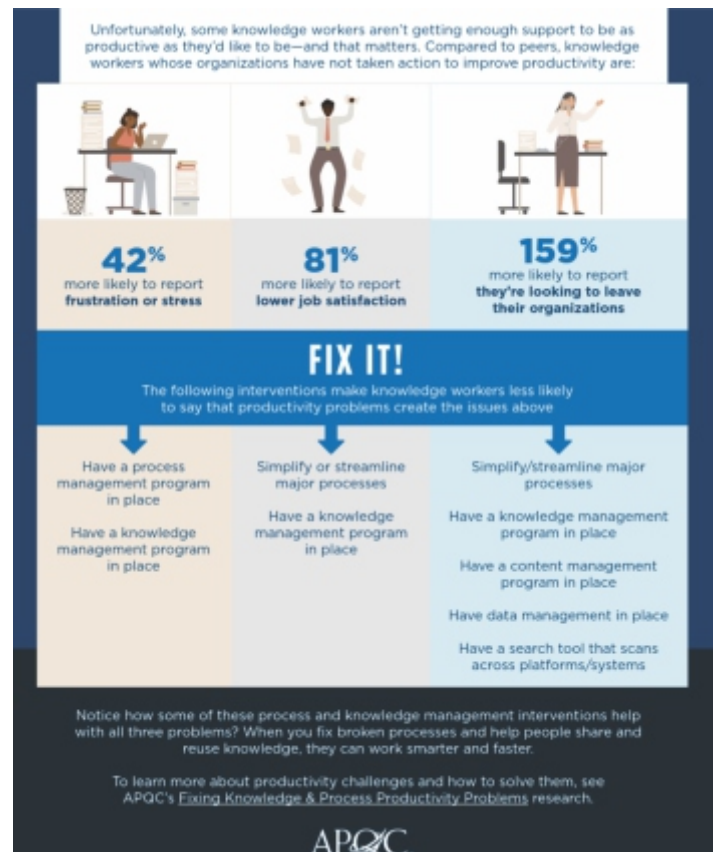


Figure 9



Figure 10: in your boardroom?



Peter K Fraser is the founding director of: **Mandos Software** ([www.mandossoftware.com](http://www.mandossoftware.com)) whose Author process mapping and management system software is used in all business sectors, and, **Process Principles** ([http://www.deethebusiness.co.uk/index\\_pp.htm](http://www.deethebusiness.co.uk/index_pp.htm)), set up to promote the benefits of process understanding and management.

[back to contents page](#)