

Getting your head around your business processes

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What's the problem?

- /// We want to re-align our processes with our real business
- /// We want to improve how our processes operate
- /// We want to align our information systems with our processes
- /// We want to choose an organisational structure that is customer-oriented
- /// and so on

Getting started in process thinking

- /// How do we get our heads around the dynamics of our organisation?
- /// How can we tell what processes we have?
- /// How can we challenge their existence?

- /// ‘How?’ means ‘Method!’

Process architecture

- /// A picture that tells us
 - /// what processes we have
 - /// what dynamic relationships they have

- /// But we need a *method* for constructing it and then for challenging what it is telling us

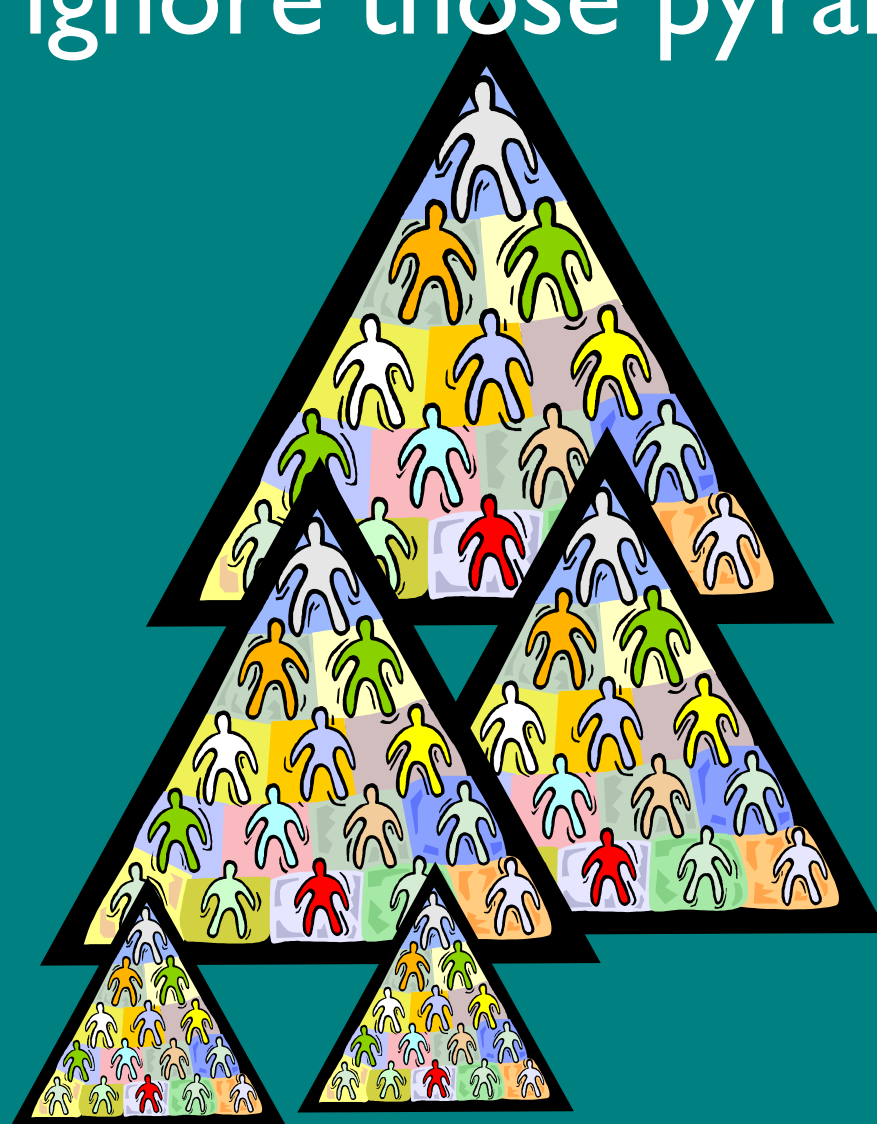
Chunking the organisational activity – leave the axe at home



... and stay out of the kebab house



... and ignore those pyramids



The real business is monkeys

- /// A customer places an *order*
- /// An *email* arrives
- /// A *clinical trial* is needed
- /// We take on a new *supplier*
- /// A possible new *product* is invented
- /// A piece of *plant* fails
- /// We gain a new *customer*

The monkeys *define* our business

/// Being in a particular business means there are certain things we must deal with

/// ... let's call them *Units of Work*, eg

- customer order
- clinical trial
- supplier
- product
- plant failure
- customer

Monkeys make demands

/// Units of work generate demands:

- demand to handle a customer order
- demand to handle a clinical trial
- demand to handle a supplier
- demand to handle a product
- demand to handle a plant failure
- demand to look after a customer

demands which are generated dynamically

. . . each of which has a 'lifetime', from start to end

Demands imply processes

/// A process to handle each unit of work

- 'Handle a customer order'
- 'Handle a clinical trial'
- 'Handle a supplier'
- 'Handle a product'
- 'Handle a plant failure'

/// The *case process*

/// which is instantiated whenever the demand is generated

Key properties of a case process

- /// It is by definition end-to-end
- /// It is a natural for appropriate measurement
- /// Inside it is where we make design decisions about
 - /// organisational structure
 - /// technology
 - /// culture
 - /// etc

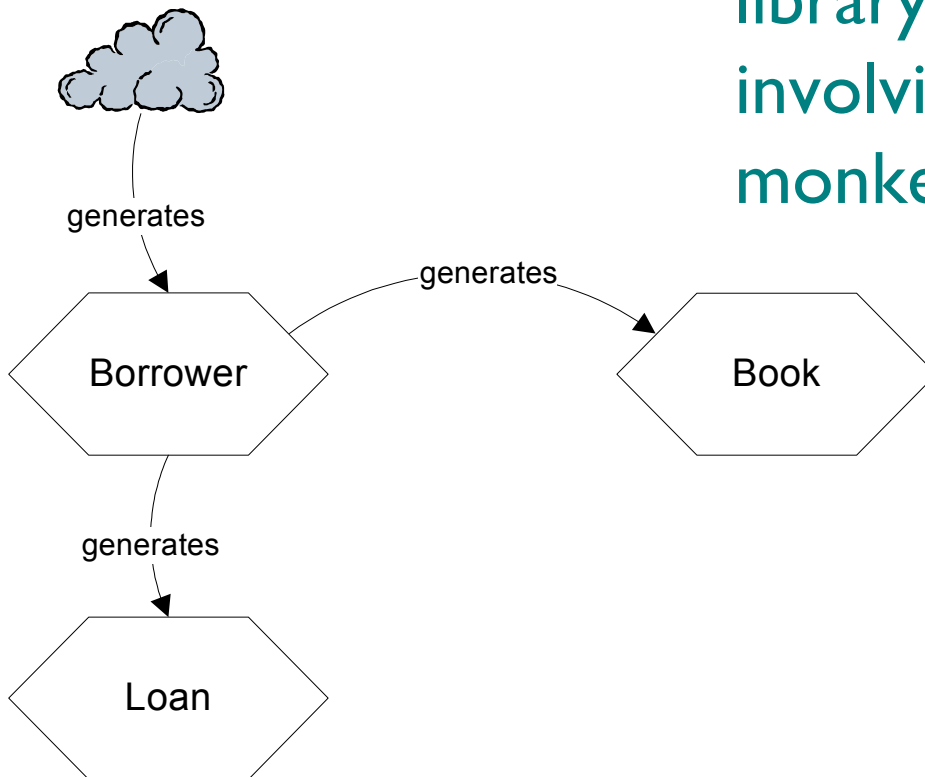
The rabbits multiply

– a case of one UoW generates cases of another

- /// A drug compound *generates* (needs) several clinical trials
 - /// During the life of the compound, clinical trials are started for it
- /// A clinical trial *generates* (recruits) many patients
- /// A plant failure can *generate* (require) one or more maintenance tasks
- /// An email can *generate* (lead to) more emails
- /// A customer can *generate* sales opportunities

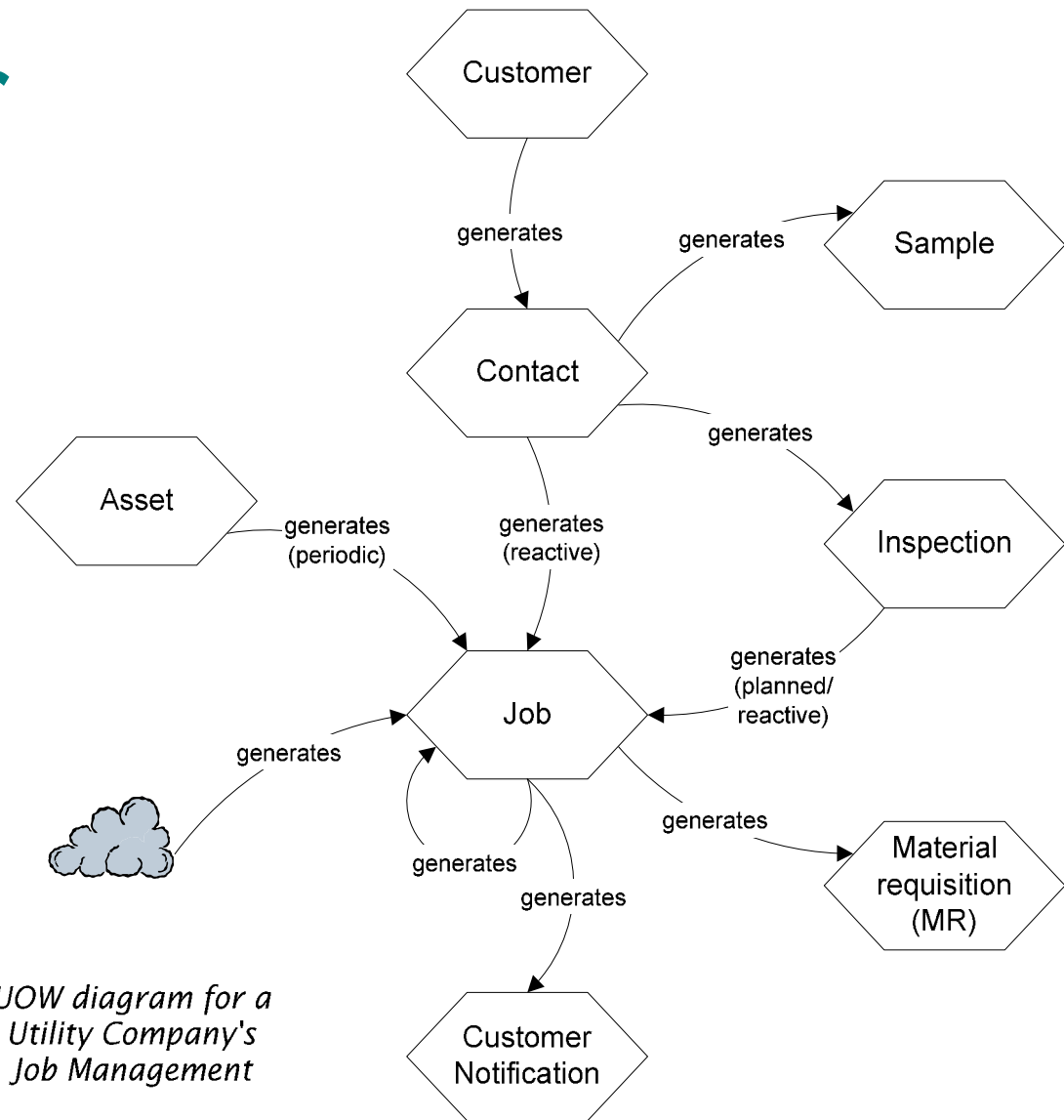
Let's draw a picture

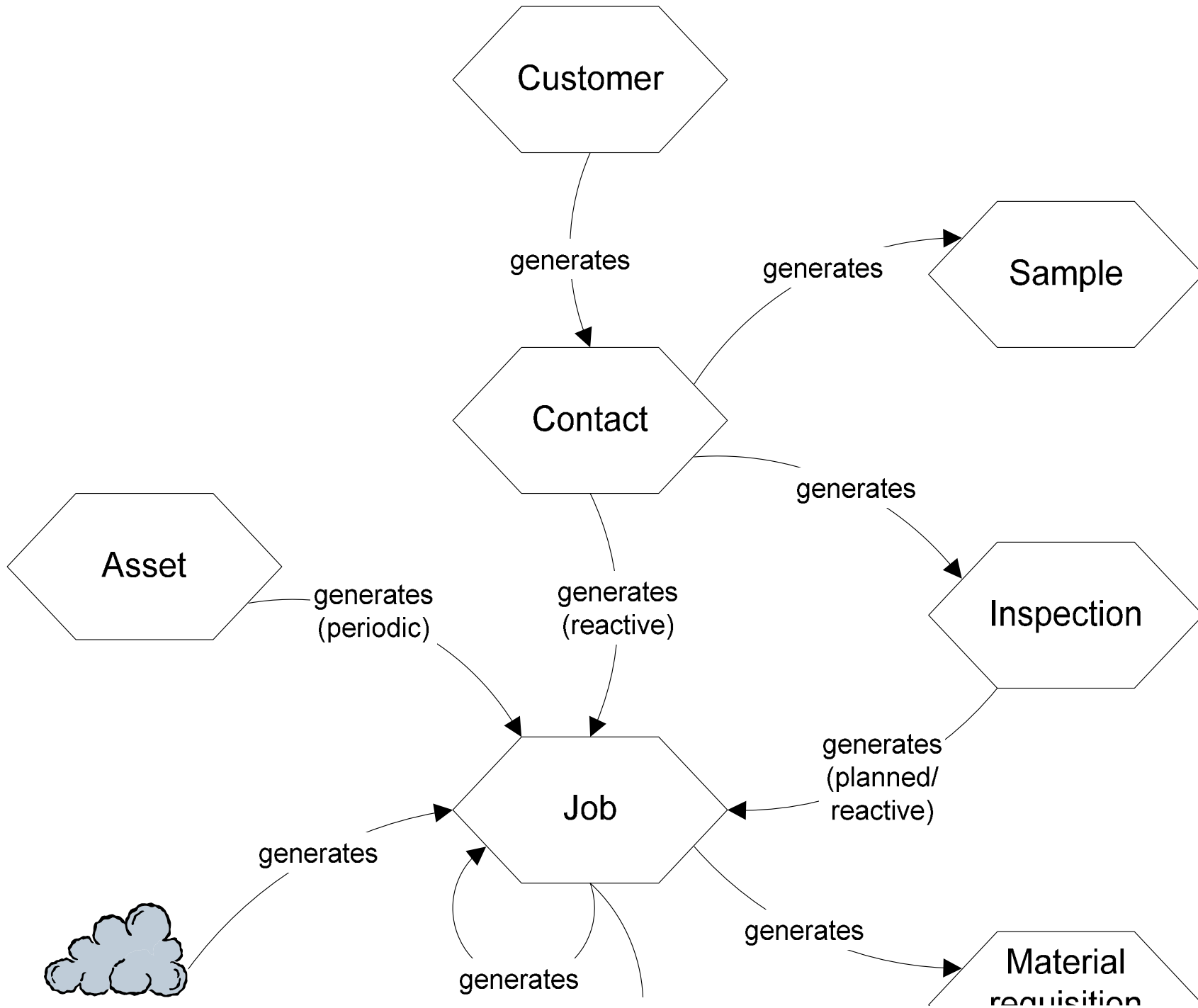
The business of being a library is a dynamic affair involving three sorts of monkey/rabbit



And another

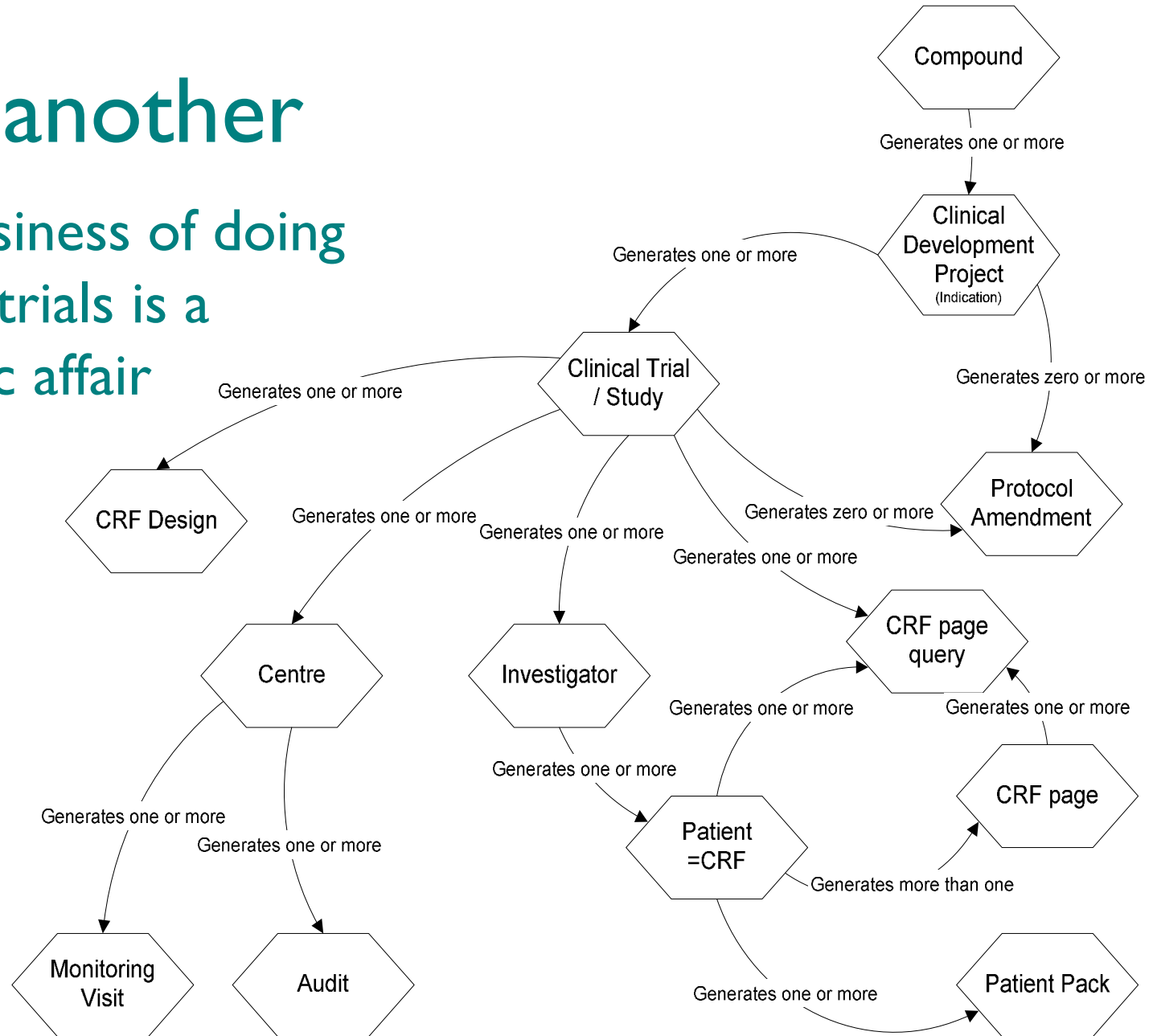
The business of carrying out jobs at a utility company is a dynamic affair





And another

The business of doing clinical trials is a dynamic affair



The rabbit warren needs management

- /// What about the scheduling, resourcing, and prioritising of all those competing cases of a unit of work?
- /// That's the *case management process*
- /// Examples:
 - /// 'Manage the flow of products'
 - /// 'Manage the flow of orders'
 - /// 'Manage the flow of deliveries'
 - /// 'Manage the flow of production batches'

Properties of a case management process

- /// It concentrates all the resourcing, scheduling, and prioritisation of cases of its UoW
- /// It determines the efficiency of resource usage
- /// It affects the transit time of requesting cases
- /// It is responsible for delay if it batches and queues

There is a third process type

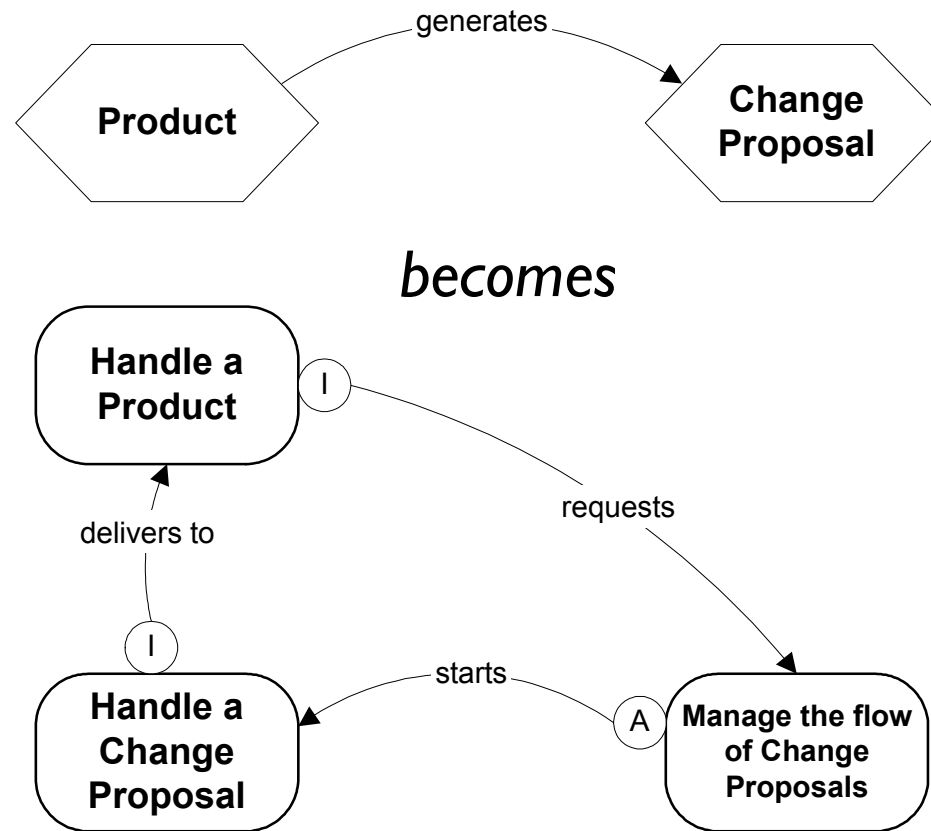
- /// The *case process* deals with one case
- /// The *case management process* deals with the flow of cases – short and medium term management
- /// Where do we take the long view?

- /// In the *case strategy process* – one per UoW
- /// For example:
 - /// ‘Take a strategic view of customer calls’
 - /// ‘Take a strategic view of plant failures’

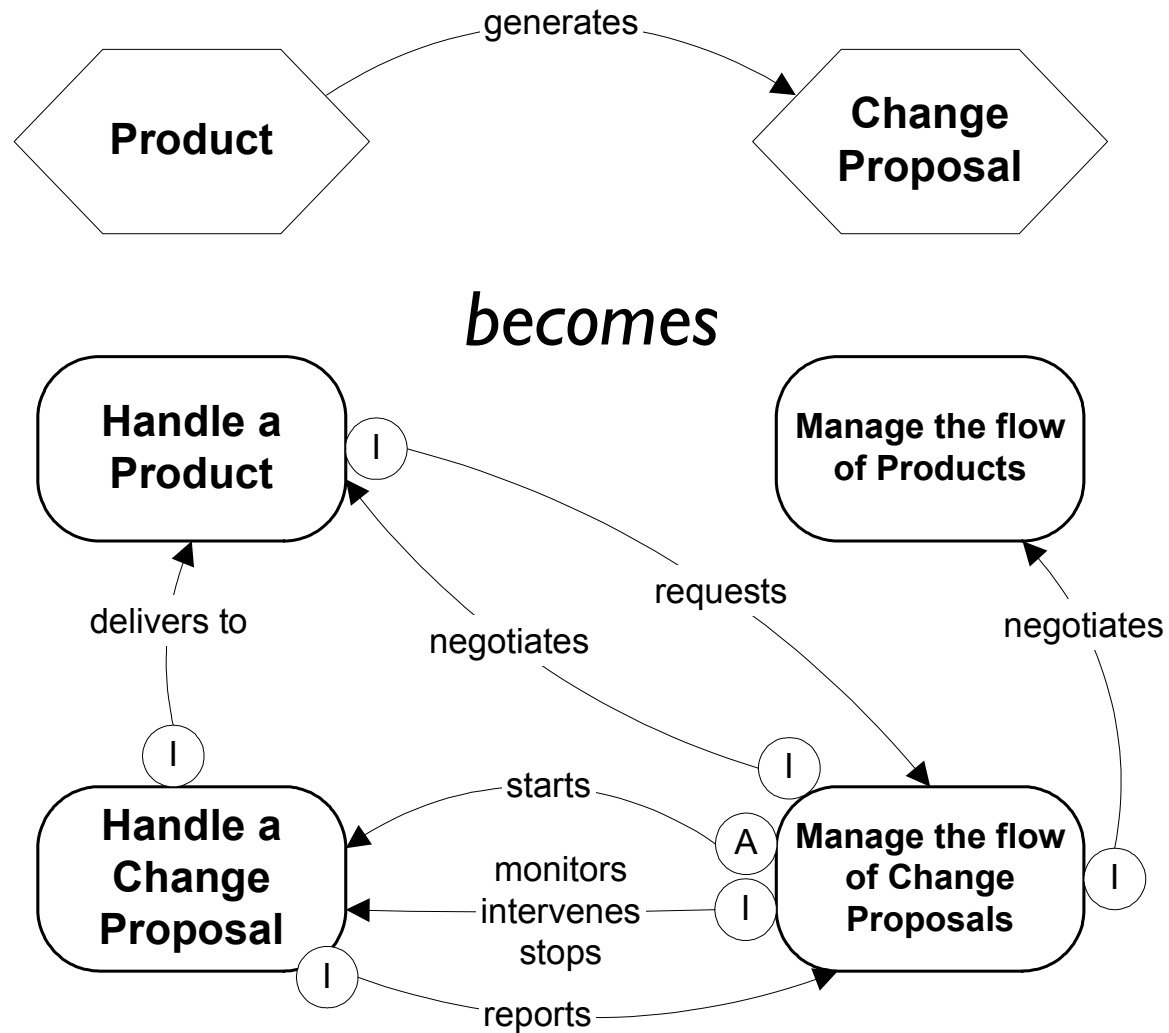
Properties of a case strategy process

- /// It encapsulates the organisation's strategic thinking about how a given UoW is dealt with
- /// It is where trends are observed and acted on
- /// It is where process improvement happens
 - /// It can change and control the case process and the case management process
- /// It might generate new cases of its UoW
 - /// 'Take a strategic view of products' might decide on some new products

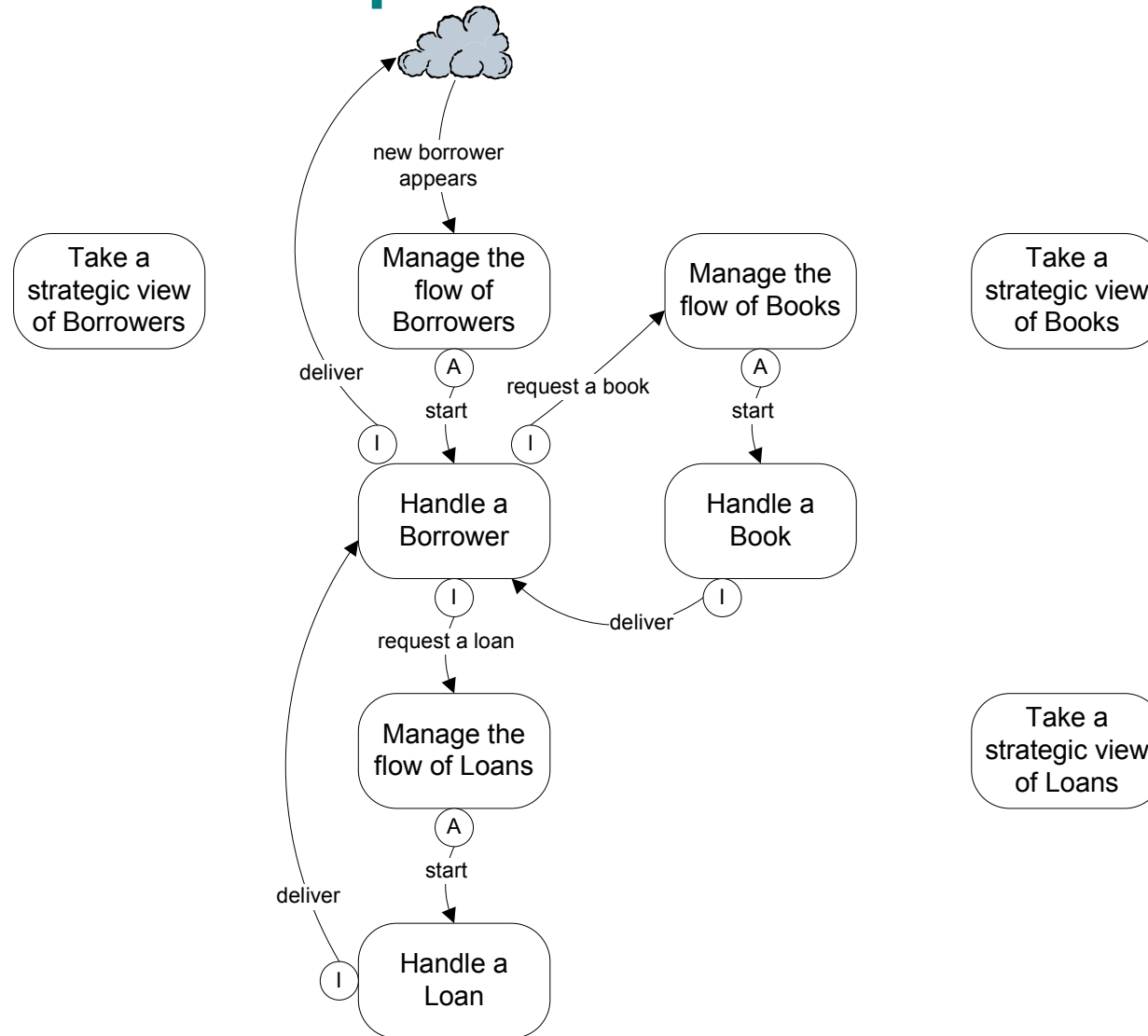
From UoWs to processes



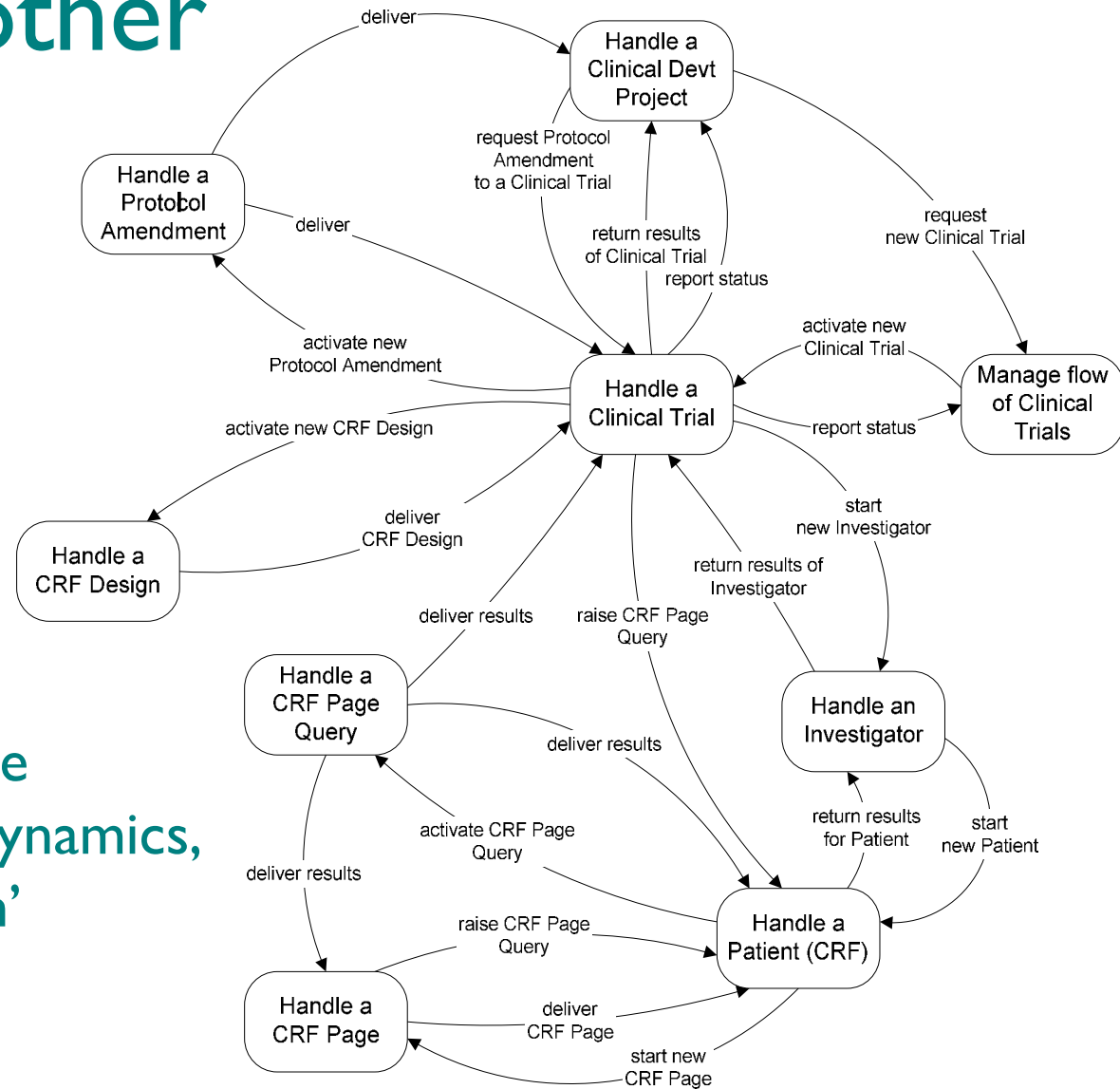
... more generally ...



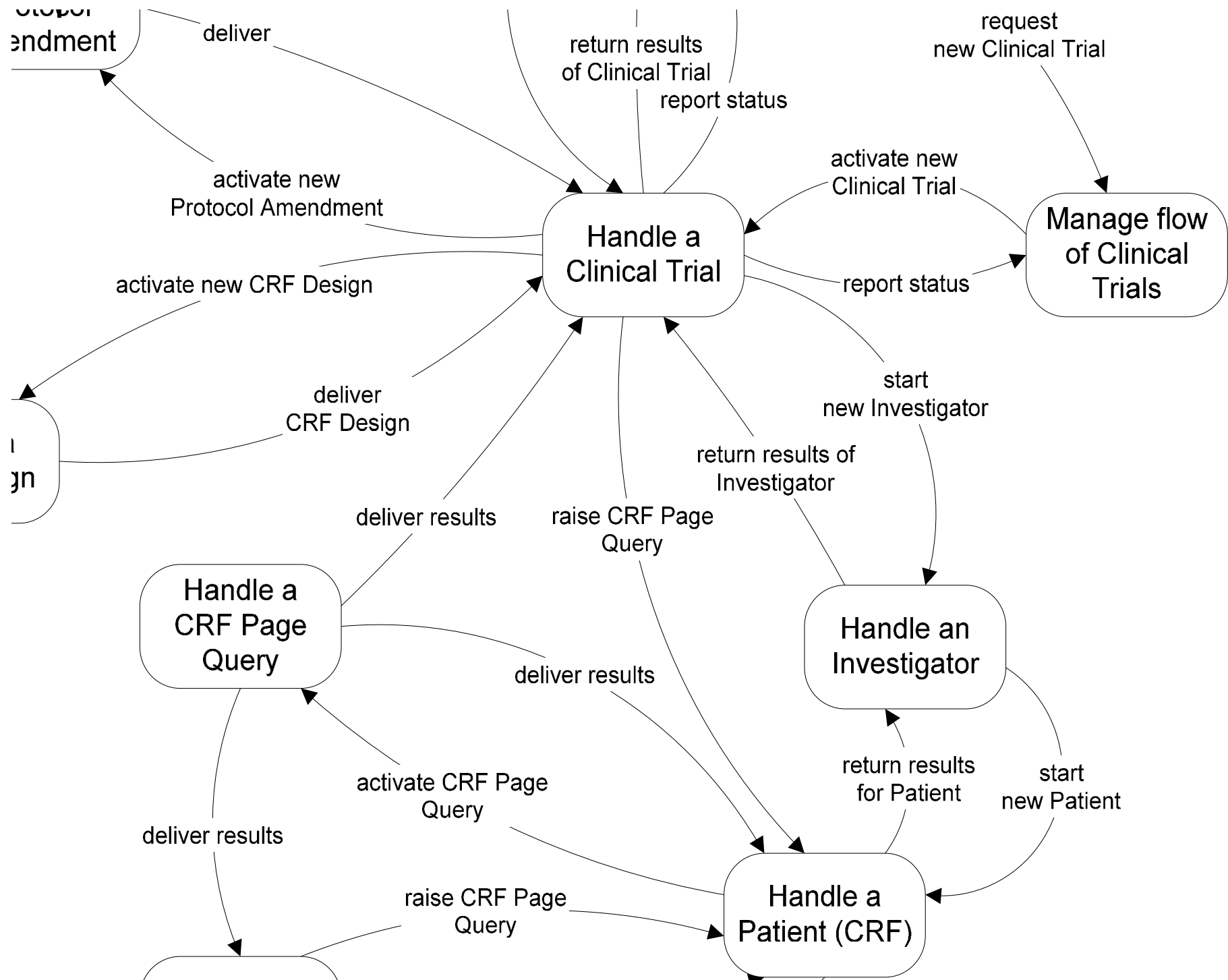
Hence the process architecture



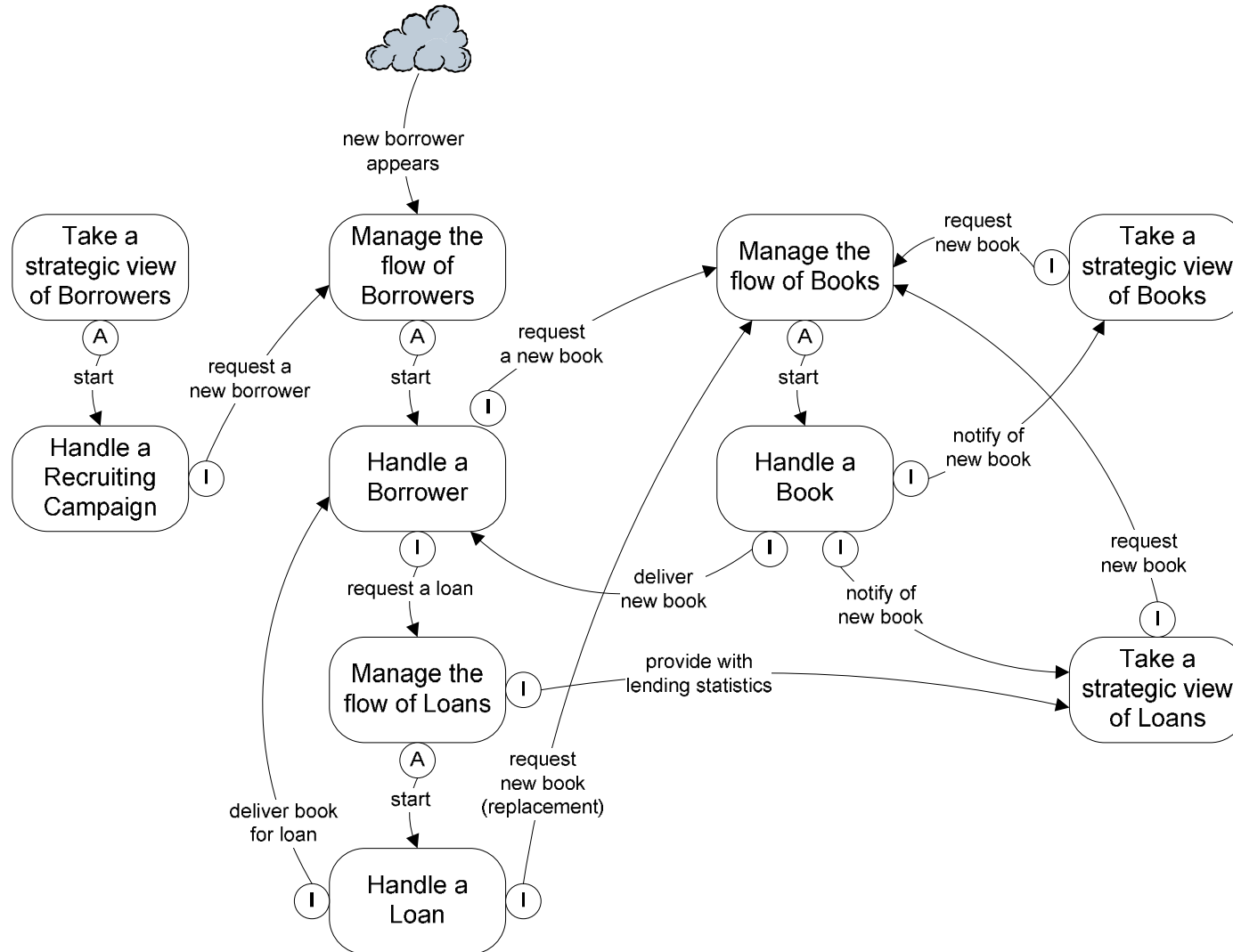
Here's another



This *Riva* process architecture captures the true dynamics, not just a glib 'chain'



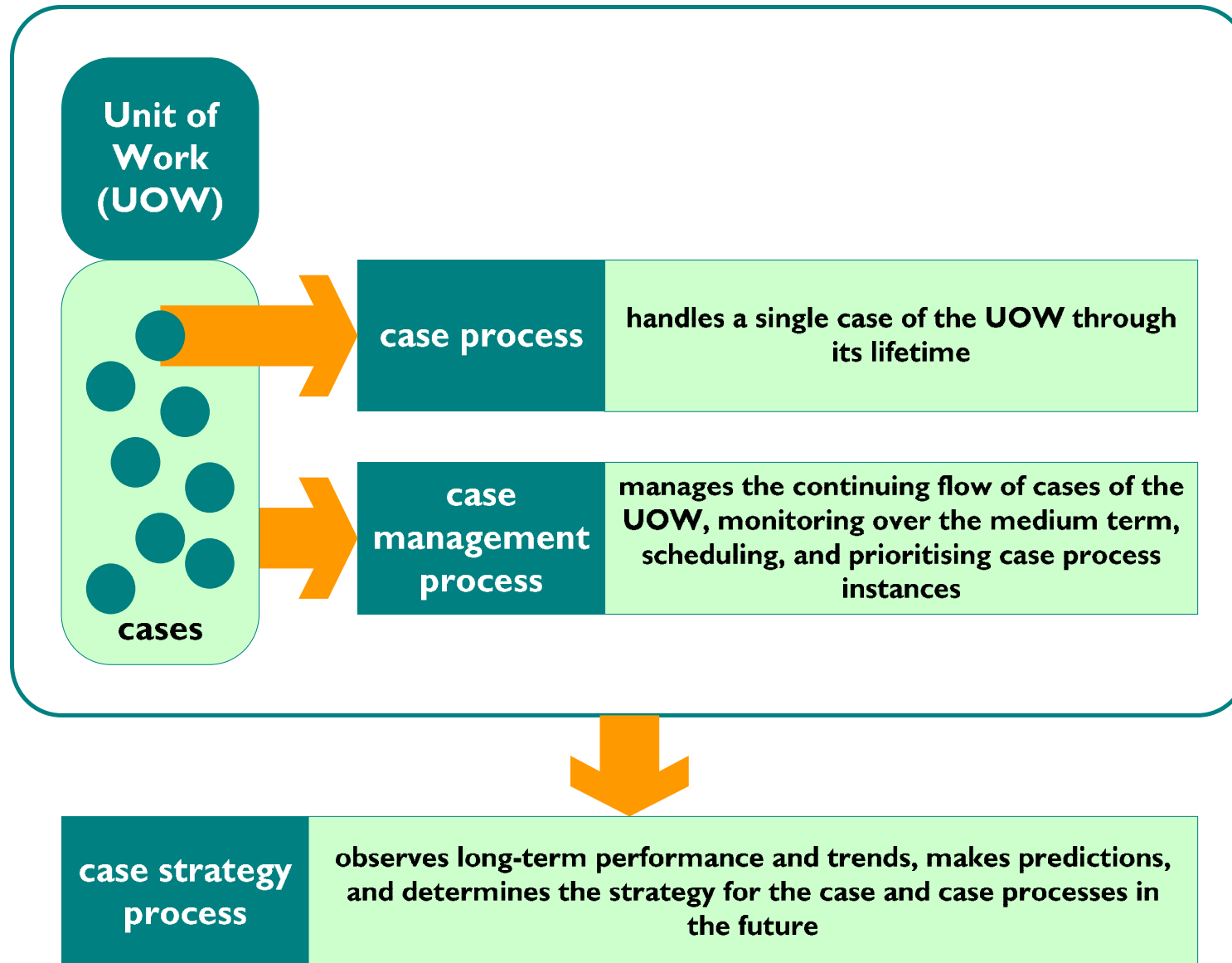
A little more work on the library's process architecture ...



'Essential' or 'Designed'?

- /// We also *invent* units of work:
 - /// Invoice
 - /// Batch
 - /// Monthly sales return
 - /// Expense claim
- /// We can challenge these 'designed' units of work
 - /// Can we do without them?
 - /// Can we achieve the same in another way?
 - /// Do they just reinforce silos?
 - /// Do they create dysfunctional behaviour?

The process trinity



Think living spaghetti

- /// Your organisation is a *network* of processes
- /// As it runs,
 - /// there is a flux of case processes
 - /// under the control of a set of case management processes
 - /// all under the strategic eye of a set of case strategy processes
- /// These are the true dynamics



Getting the process architecture in practice

- /// Brainstorm the *essential business entities*
- /// Extract the ones that are *units of work*
- /// Capture the 'generates' relationships between them on a *Unit of Work Diagram*
- /// Transform that Unit of Work Diagram into the *Process Architecture Diagram*

Examples of process architectures

- /// The virtual organisation by which innovations get into the NHS
- /// An entire engineering consultancy
- /// A new utilities organisation operating in a newly defined regulatory role
- /// The pharmacy of a pharmaceutical R&D company
- /// A university faculty's course administration
- /// A London Borough

Benefits of a *Riva* process architecture

- /// The chunking into essential processes won't change
 - /// It is independent of our design decisions
- /// 'Designed' processes are exposed
- /// We see *all* our processes:
 - /// the true end-to-end (case) processes
 - /// the (influential) case management processes
 - /// the (vital) case strategy processes
- /// Who could ask for a better place to start our process thinking?

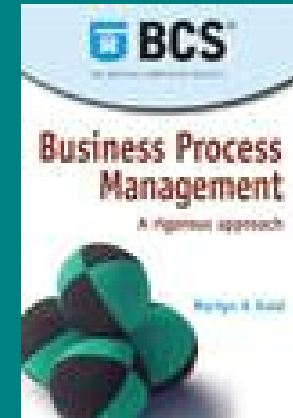
For the full story of *Riva*, read

Business Process Management A Rigorous Approach

by Martyn Ould

published by the British Computer Society
and Meghan-Kiffer (North America)

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