ENSURING SUCCESS
IN BUSINESS PROCESS ANALYSIS AND DESIGN

BY TONY STEWART

ORGANISATIONS ABOUT TO UNDERTAKE A MAJOR PROJECT – WHETHER USING WEB SERVICES TO CONNECT AN AD-HOC FEDERATION OF PARTNERS AND SUPPLIERS, ROLLING OUT AN END-TO-END ERP SYSTEM, OR MAKING BEST USE OF THE NEW BUSINESS PROCESS MANAGEMENT TOOLS – SHOULD HEED THE NEED TO ANALYSE AND DEFINE THEIR OWN BUSINESS PROCESSES.

> "
>
> **Use consultants to enable your own people to do the core design work; don't use consultants to design the processes themselves**
>
> "

In almost every major IT or business change project, a critical first step is to analyse and define the business processes that will be affected.

This article sets out 12 guidelines that can make the difference between success and failure. These were developed based on RivCom's extensive experience supporting process-related projects in corporate settings – our work for Shell, for example, extends over ten years and spans many projects to identify, rationalise and communicate business processes.

APPROACH
CHOOSE A TOP-DOWN OR BOTTOM-UP APPROACH

In a top-down project, the process model is developed by a central team and then rolled out in a single major effort. This is most suitable for green field situations, or when implementing best-of-breed technology that requires a particular process flow. In the bottom-up approach, distributed teams analyse existing processes, identify the good ones and 'fix' the bad ones. This is often the better approach because the processes are developed organically, generate an increased level of buy-in and can be rolled out incrementally.

DO THE CORE WORK IN-HOUSE

Use consultants to enable your own people to do the core design work; don't use consultants to design the processes themselves. Otherwise, when problems come up during implementation, your staff may not be fully committed to the new processes and may not do what it takes to make them succeed.

PRIORITISE YOUR EFFORTS

Process improvement demands significant commitment. An organisation should not try to do more than its business can absorb. Identify processes with the strongest business case for change and tackle those first.

METHODS
USE A COMMON METHODOLOGY TO ENSURE A SHARED VOCABULARY

Select a business process design methodology before you start and make sure that everyone on the project uses its templates and

DEVELOP MECHANISMS TO SUPPORT DISTRIBUTED TEAMS

In larger projects it is often best to divide the work among distributed teams. If these teams use the same terminology and start from a shared high-level model, it is easier to assemble their results into a coherent view of the business. If not, ensure that you include a project phase to merge and rationalise the inconsistencies between models.

COMMUNICATION

IDENTIFY THE INFORMATION TYPES

The information captured in a business process project includes not only the process designs, but also supporting items such as each process' purpose and objectives, key performance indicators, good practice examples, HR competences, preferred technologies and procedure guidelines. At the start of the project, identify the information you require, then develop templates and guidelines to capture this information clearly and consistently.

terminology. This ensures that managers making key strategic decisions share the same core vocabulary and concepts.

GET THE RIGHT PEOPLE IN THE ROOM

Each team should include members who are intimately familiar with the activities being modelled, including managers with strategic vision and workers who understand the operational issues.

PROCESSES FIRST, THEN TECHNOLOGY

Except when the aim is to implement a specific application, processes should be defined independently of the systems that will support them. Understand each preferred process, then decide how best to use technology.

TOOLS

BE PRAGMATIC

There are many tools to support process design, but each has different strengths and weaknesses and none capture the full range of process-related information that many projects require. You can do very well using lightweight tools like Visio and Excel, supported by templates and guidelines to ensure consistency.

STORE THE INFORMATION IN A NON-PROPRIETARY FORMAT

Whatever the preferred tool, process models and related information should be stored in a standard format such as XML, from which they can be published for users and also imported into workflow and BPM tools.

DEVELOP A COMMUNICATIONS INFRASTRUCTURE

During the course of a typical project, the team will disseminate the processes and supporting materials, gather feedback on them and then iteratively improve them. This requires the set-up of an appropriate communications infrastructure. One approach is to implement a business process knowledge management framework that combines the process models with their supporting information and makes them available in a controlled way to those who need access.

USE THE MODELS AS AN INFORMATION PORTAL

A business process model can be a table of contents into your organisation. By publishing your models as an interactive Intranet site and linking them to a knowledge management framework, you enable users at all levels to navigate to a process and retrieve the information they need quickly and efficiently.

Of course, each business process project is different. But we have found these guidelines useful, regardless of the project's drivers, scope or strategic level. ■

Tony Stewart (tony.stewart@rivcom.com) is director of consulting at RivCom, (www.rivcom.com), an independent and vendor-neutral consultancy that specialises in helping organisations identify, analyse, define and communicate business processes. Tony has many years of experience supporting business process analysis and design projects in the UK and USA.