BPR Tiger Teams

WELCOME !

&

Introductions

Ground Rules

- **Participate – ** Minimize other business
- **Listen** –
  - One conversation at a time
  - Give others a chance to speak
  - No side conversations
- **Respect** each person’s views
- **Challenge –** The norm … “the way we’ve always done it”
- **Share** – Your experience, thinking and observations
- **Turn off** – Phones / pagers / laptops / Blackberries

Agenda

- Introduction of Team Members
- Introduction to BPR Tiger Teams
  - What is a Tiger Team?
  - Tiger Team Steps
  - Understanding Processes & Process Modeling
- Facilitating BPR Tiger Teams
  - Purpose
  - BPR Tiger Team Goals
  - Challenges
  - Facilitation Tips
  - Facilitating BPR Workshops
  - Basic Visio Overview

What is a Tiger Team?

- The purpose of a BPR Tiger Team is to quickly develop “straw-man” business processes that are aligned with SAP.
- The straw-man processes will be verified and refined by larger Functional SME teams and then adopted as the standard.
- The *Tiger Team* will build on the work done by the Blueprinting Team

Tiger Team Steps

Steps	Activities
1. Prioritize Processes	• Determine prioritization factors • Rate current processes based on factors • Rank processes
2. Establish Team(s)	• Determine SMEs for each team • Establish charter for each team • Train team on processes/ process tools
3. Review SAP Flow	• Using current SAP flows to determine how the process works within SAP
4. Determine Business Process	• Develop Level 1 – 4 business process using SAP as your starting point
5. Highlight Process Issues	• Highlight issues where process is unclear. This includes area where the following areas are unclear: handoffs, steps, approvals, etc.
6. Resolve Issues	• Tiger Team determines what is best way to handle issues • Recommendations are made to affected business process owner
7. Finalize Business Process	• Business process is finalized based on approvals
8. Combine Business Process & SAP	• Documents are developed that includes SAP and Business Process
9. Approve & Publish Final Version	• Approval of combined process is received • Final version is approved
10. Train Staff on new processes	• Utilizing the new approved documentation, train appropriate staff

Step #1 – Prioritize Processes

- Determine prioritization factors
- Rate current processes based on factors
- Rank processes

BIS Project - Release 1B - Business Processes	Criteria Assessment #1	Criteria Assessment #2	Criteria Assessment #3	Criteria Weights #1	Criteria Weights #2	Criteria Weights #3	Weighted Assessment #1	Weighted Assessment #2	Weighted Assessment #3	Weighted Assessment Total
1.1 Accounts Receivable										
1.1.2 Business Processes										
1.1.2.1 Billing	5	2	3	1	2	3	5	4	9	18
1.1.2.2 Dunning	3	3	5	1	2	3	3	6	15	24
1.1.2.3 Payment Application	2	4	3	1	2	[illegible]	2	8	9	19
1.1.2.4 Reporting	4	4	2	1	[illegible]	[illegible]	4	8	6	18
1.2 Accounts Payable										
1.2.1 Business Processes										
1.2.1.1 Invoices Processing	2	[illegible]	5	1	2	3	2	8	15	25
1.2.1.2 Invoice Adjustments	3	3	4	1	2	3	3	6	12	21
1.2.1.3 Payment Processing	4	2	3	1	2	3	4	4	9	17
1.2.1.4 Vendor Balance Management	2	4	4	1	2	3	2	8	12	22
1.2.1.5 Year End Processing	3	3	2	1	2	3	3	6	6	15
1.2.1.6 Reporting	4	2	3	1	2	3	4	4	9	17

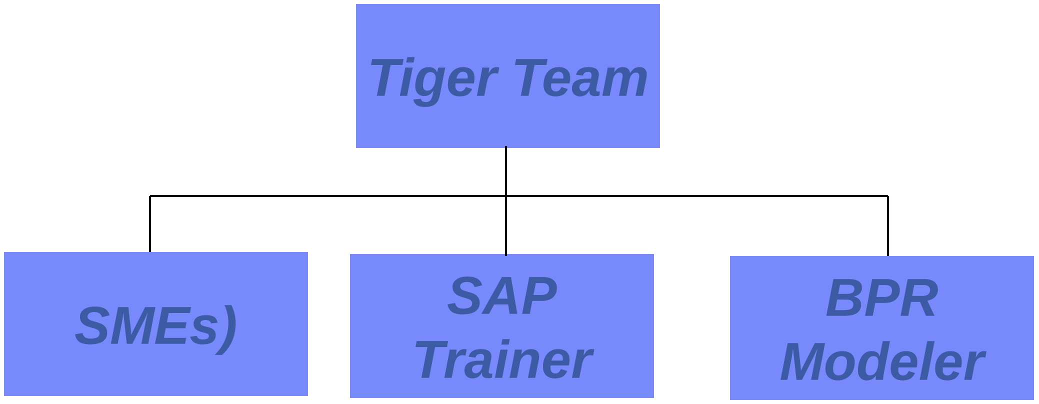
Notational

Step #2 - Establish Team

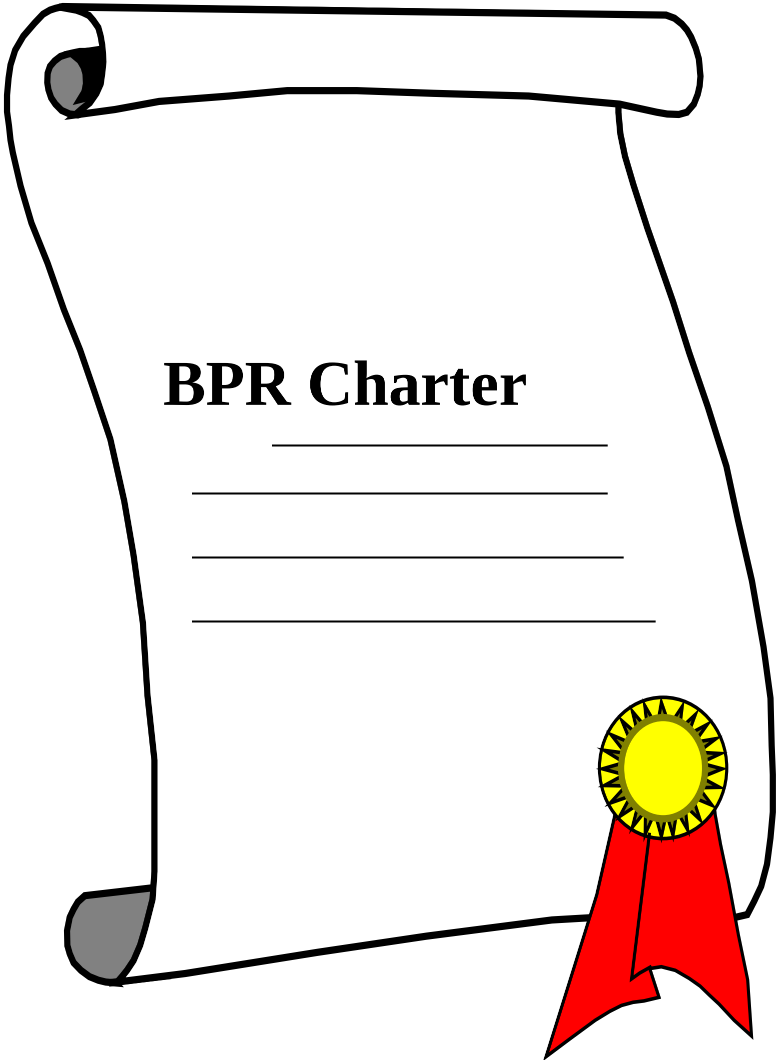
- Determine SMEs for each team
- Establish charter for each team
- Train team on processes/ process tools

Select Tiger Team Members

- Tiger Teams need to be small with highly qualified individuals to move quickly
- Suggested Team composition: 2 SMEs, 1 SAP Trainer, 1 BPR Modeler/Facilitator
- A minimum of 3 Teams: HR, Finance, Supply Chain



The BPR Charter provides the clear direction for the BPR effort



Reasons for writing a charter:

- To create the vision, the goal, and the direction for the BPR work so the Tiger Team understands what they are trying to achieve.
- To be sure the BPR work is clearly linked to strategy and goals.
- To clearly set boundaries: what may be designed what remain beyond the design team's scope
- To share any expectations regarding the nature of the processes to be used by the BPR team
- To share any expectations that the core team may hold regarding the final work product in terms of the work processes or culture of the agency.
- To clarify expectations for process time and deliverables.

To establish successful direction the Tiger Team needs to develop/ adopt a charter

- A good charter contains 6 elements
  - Team Purpose
  - Vision-Mission and Values to Be Upheld in the Planning and Execution
  - Team Roles , Responsibilities & Expectations
  - Team Goals
  - Team Boundaries /Parameters
  - Team Support

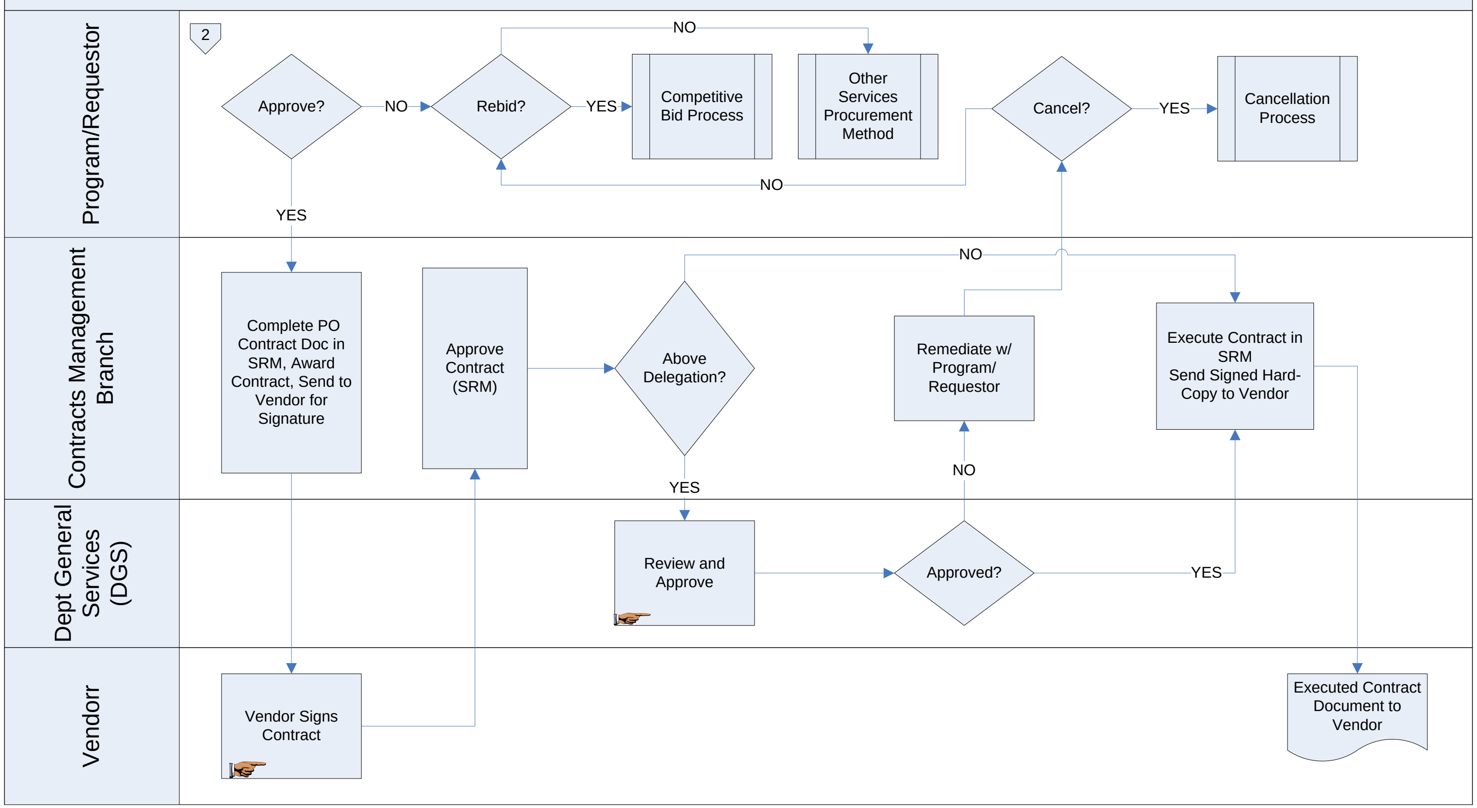
Train Team

- Train Teams on essentials:
  - Tiger Team Steps
  - Process Modeling
  - Facilitation
  - BPR Templates

Step #3 – Review SAP Flows

CDCR BIS Project	**Business Process** Competitive Bid Contract	**Solution Manager Location:** BIS Project_SCM_PDD09_Contracts
Business Process Owner: Steve Alston **Process Team: Supply Chain Team** **Created by: Warren Green** **Creation Date: 11/09/2007**		**Legend:** Activity; Other Process; Type of Activity/Other Process: ...Manual, ...computer based (non-SAP); Process Trigger and Termination; Decision; Document; On-page Connector; Off-page Connector

Competitive Bid Contract (Page 3 of 3)



Step #4 – Develop Business Process

Level 1

Value Chain
Top Level Map of the entire organization. Each box represents a business process chain. A business process chain is group of linked (serial or parallel) processes.

Level 2

Process Chain
Process Chain Map of one of the level one chevrons. Each box represents a group of sub-processes.

Level 3

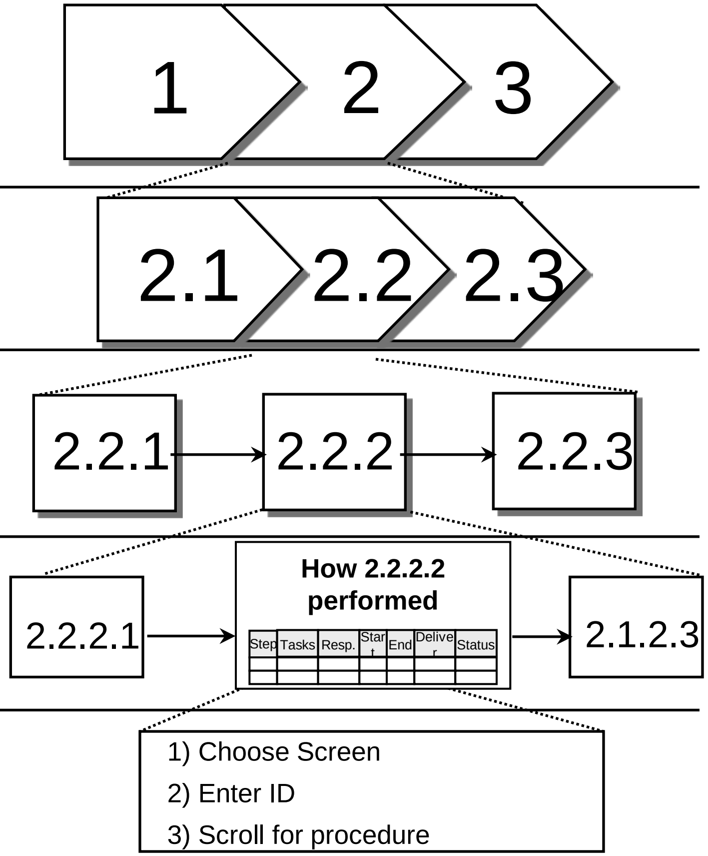
Process Map
At this level physical work is represented. Each box represents a group of activities which produce an outcome. Analysis of existing processes are undertaken .

Level 4

Task Documentation
This represents a procedure or narrative which represents the decomposition of a task into further detail. Describes the HOW the task is performed

Level 5

Step/Script Documentation
This represents detailed information about how to complete an activity. Each item is a specific action to be taken – procedures.



Key Point

To develop and communicate the solutions, level 3 process maps are usually adequate, except for the areas requiring major changes

Process Decomposition Illustration

Example of Level 1-4 Processes

Determine in which part of the company's value chain you are working

Level 1

Value Chain

1 Perform Marketing
2 Perform Sales
3 Produce Products

Level 2

Process Chain

2.1 Sales Planning/Analysis
2.1 Retail Execution
2.3 Strategic Customer Development/ Category Mgmt
2.4 Manage Accounts

Level 3

Process Map

2.1 Sales Planning and analysis:
2.1.1 Forecasting
2.1.2 Market analysis
etc.

Level 4

Activity Map

2.1.1 Forecasting
2.1.1.1 Field sales submits account forecasts to central admin
2.1.1.2 Central admin collects
2.1.1.3 Central admin forwards to Regional Sales Manager
2.1.1.4 RSM revises regional forecast
etc.

List out the Level 2 and Level 3 processes using a process decomposition template (see next page).

Step #5 - Highlight Process Issues

- Highlight issues where the process is unclear. This includes area where the following areas might be unclear: handoffs, steps, approvals, etc

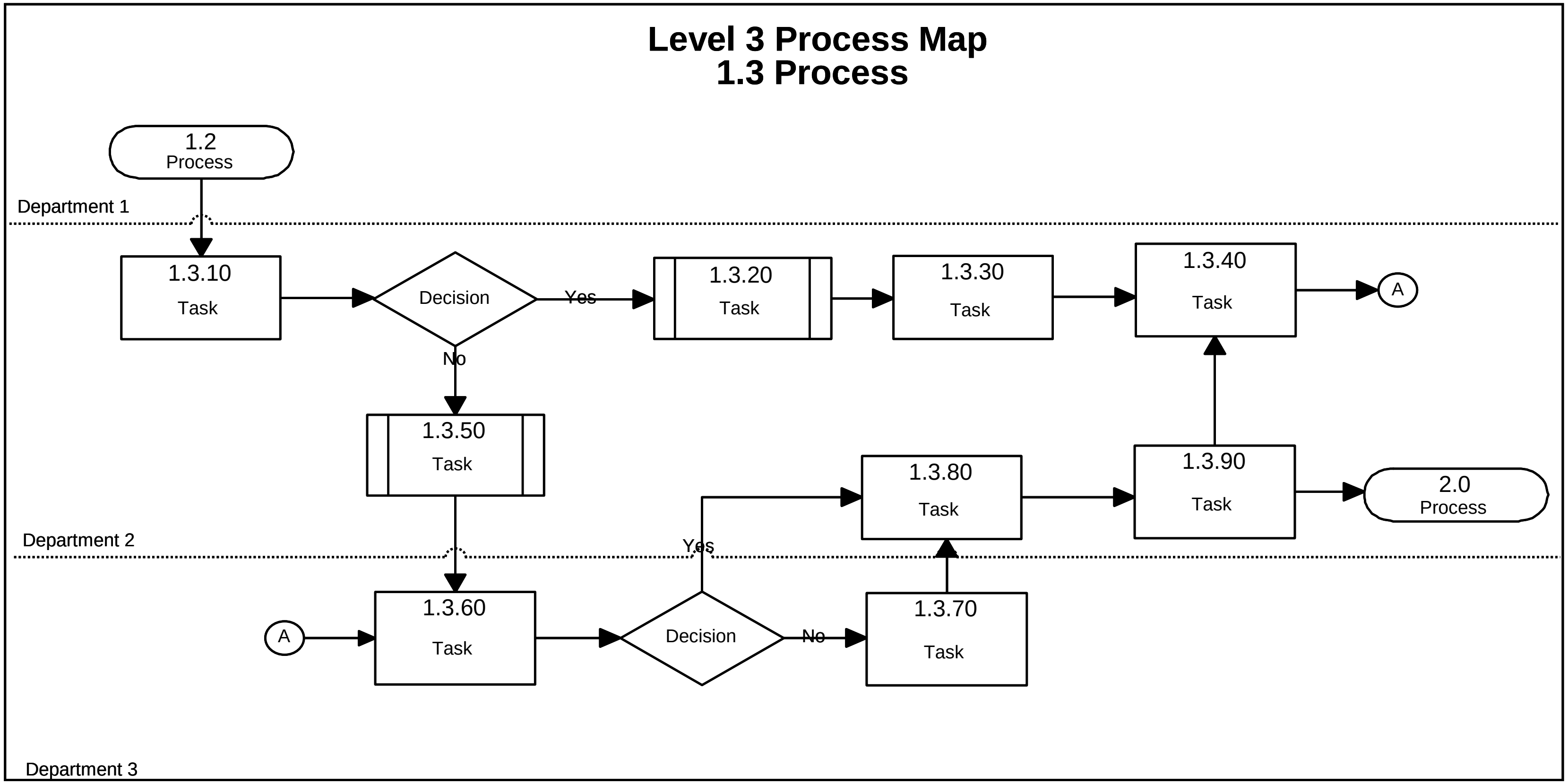
#	Process Number	Issues	Opportunities	Benefits	Risks	Resources Required
1	Plan 1.3	Zone forecast not communicated to Demand Planning	Provide regional forecast to optimize use of production facilities wherever possible			•
2	Plan 1.3	Nestle forecast is only by sales with minimal marketing input HD forecast created by marketing with minimal (no) sales input	Demand Planning should drive the forecast OR at least one common owner / system to drive the forecast; forecast should be statistically based, automatically generated. Then marketing & sales intelligence can be applied to adjust accordingly.			•
3	Plan 1.3	No commonly defined forecasting processes across product groups; Packaged grocery Novelty impulse & food service Grocery Novelties & club				•
4	Plan 1.3	Common understanding of data points & formats between marketing and Planning & Scheduling				•
5	Plan 1.3	No definition of success for this process				•

Step #6 – Resolve Issues

- Tiger Team determines the best way to handle issues
- Tiger Team develops “straw-man” process
- Tiger Team presents “straw-man” to Functional Team
- Tiger Team & Functional work to finalize the process

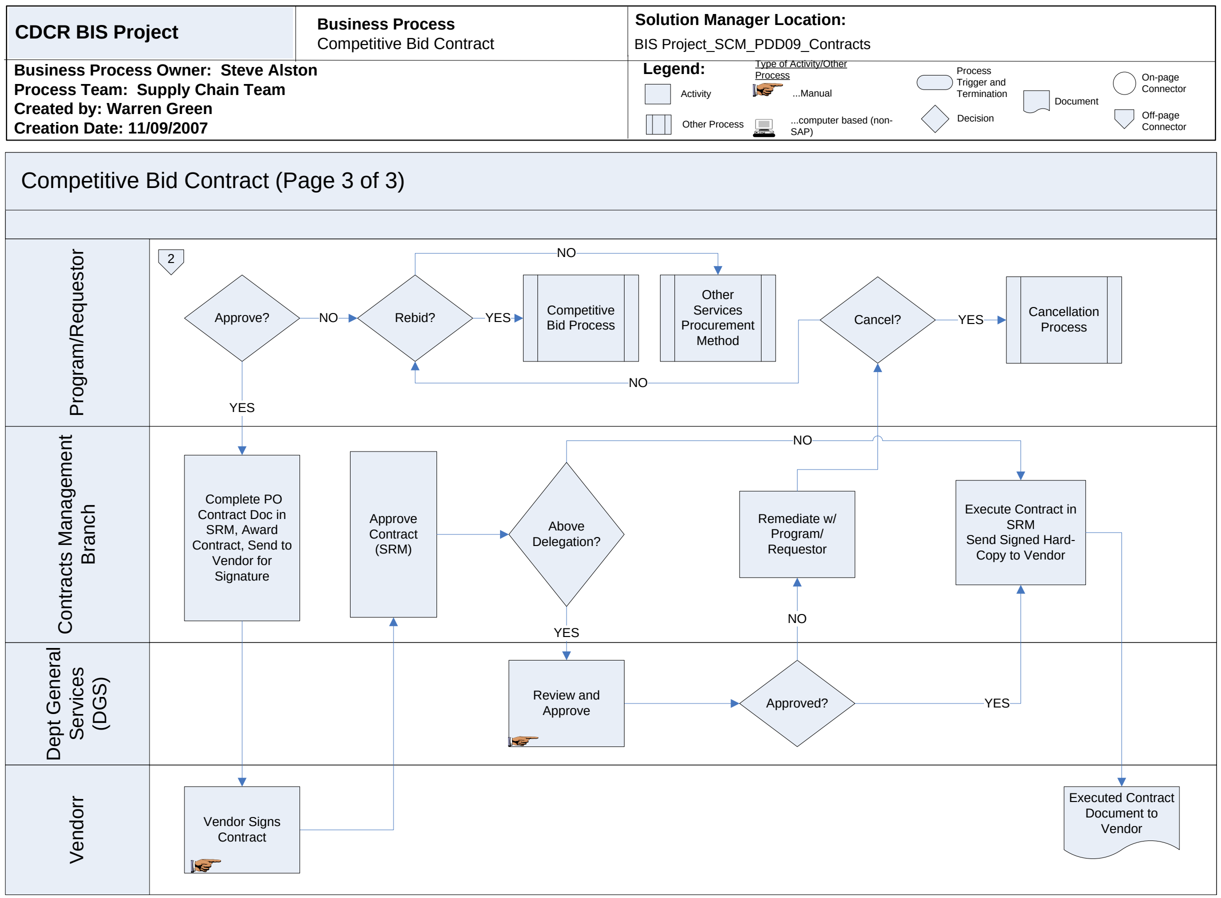
Step #7 – Finalize Process Flows

- Business Processes need to documented at Levels 1-3.
- In rare cases Level 4 may be required. This will be left to the discretion of the team.



Step #8 – Combine Process with SAP

- Once Process has been finalized – update SAP as required



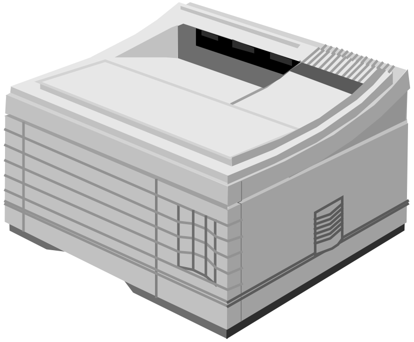
Step #9 - Approve & Publish Final Process

Functional Team

Recommendation

Functional Mgr.

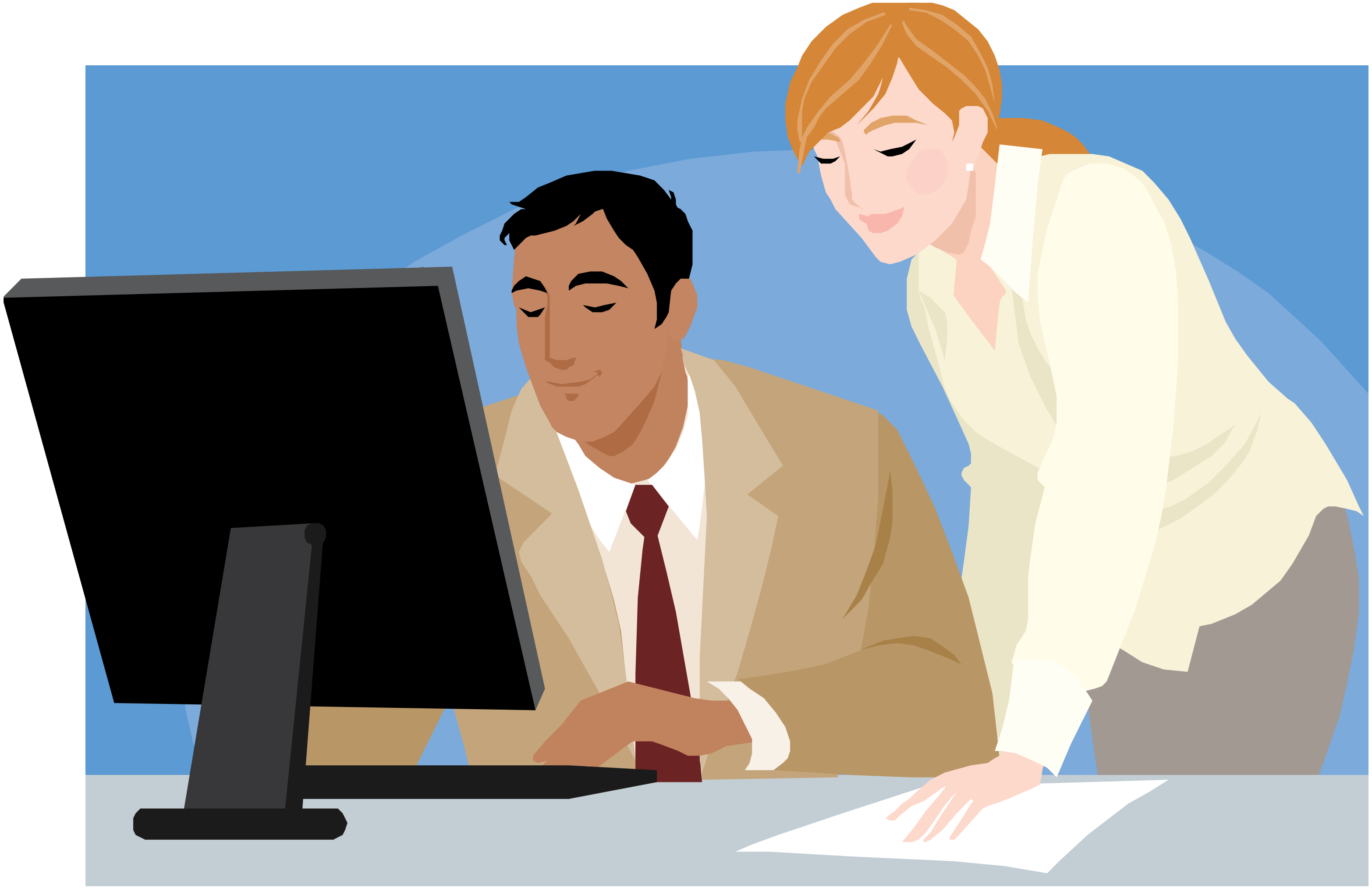
Approval



Publish Approved Process

Tiger Team Recommendations

Step #10 – Train Staff on New Process

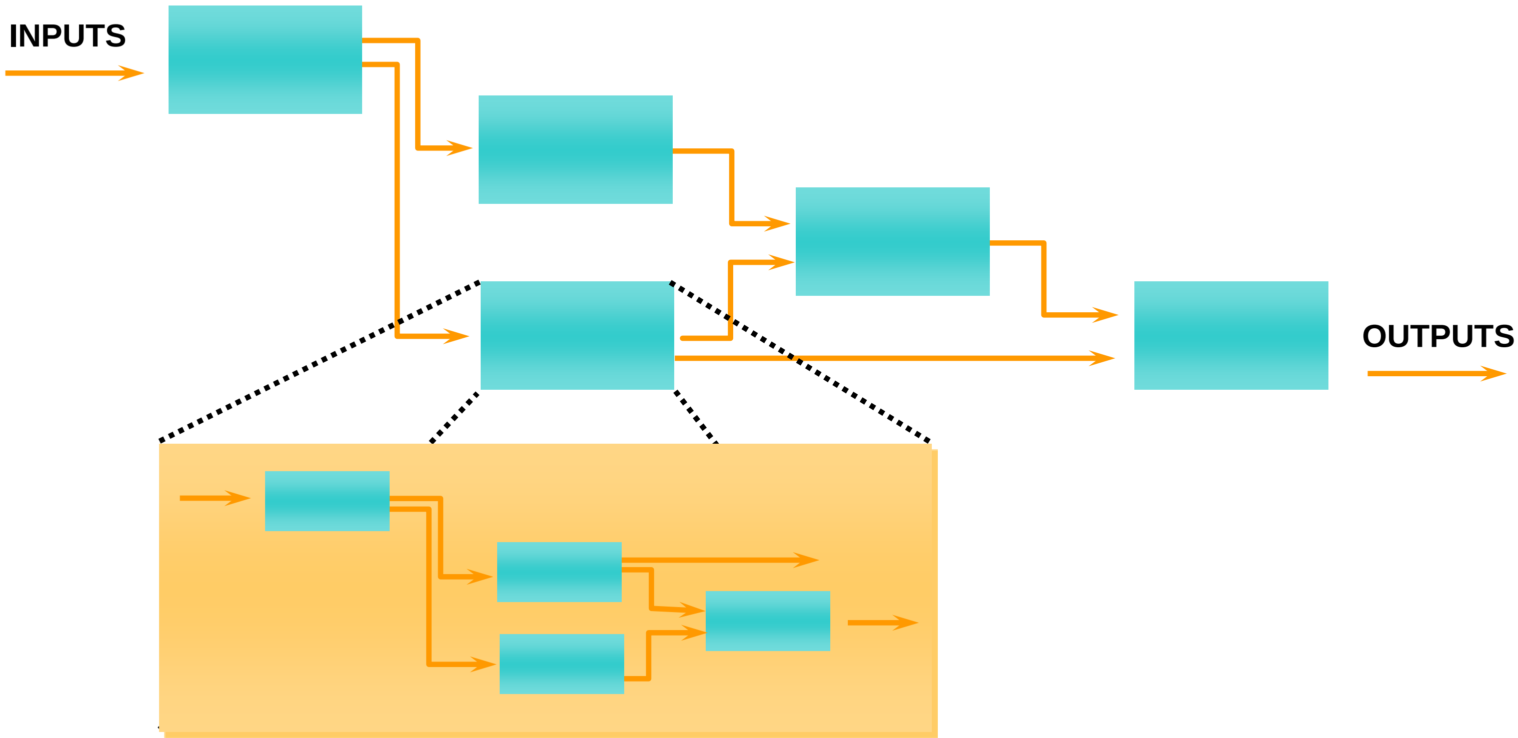


Understanding Processes

&

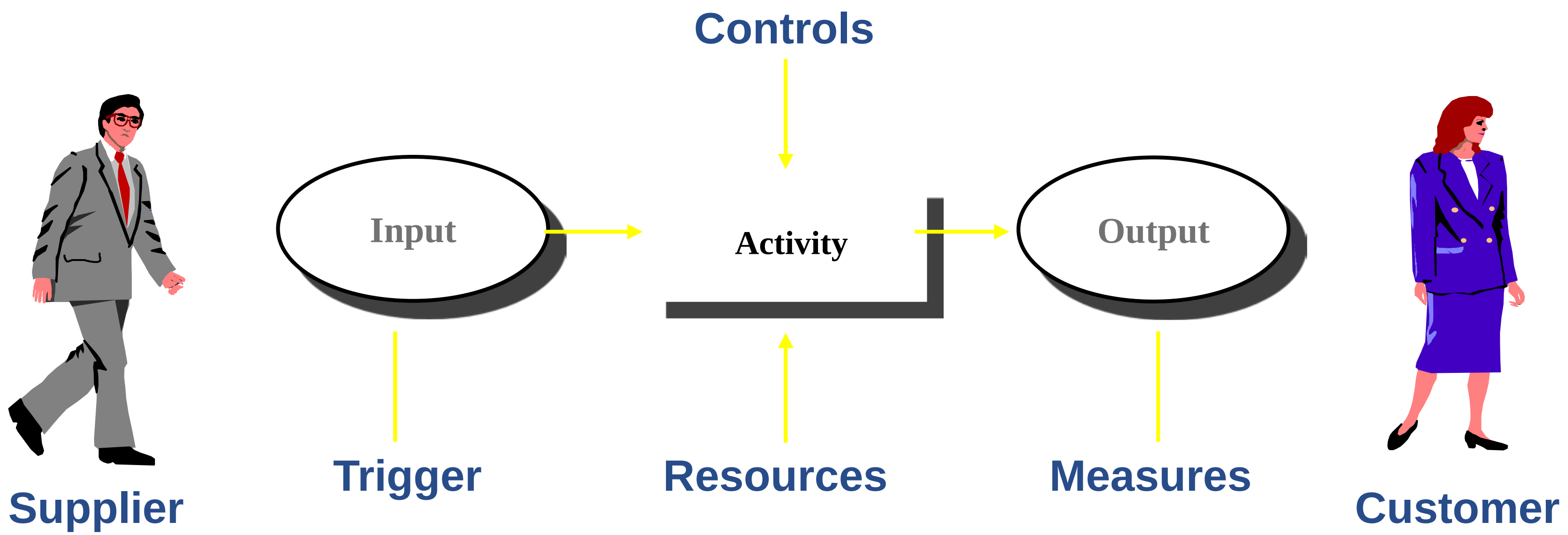
Process Modeling

What is a process?



.............a series of related activities linked by inputs and outputs

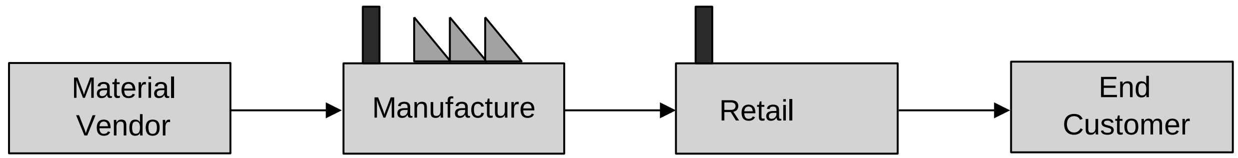
Activities may be defined as ...



... the things people do that consume resources and transform inputs into outputs

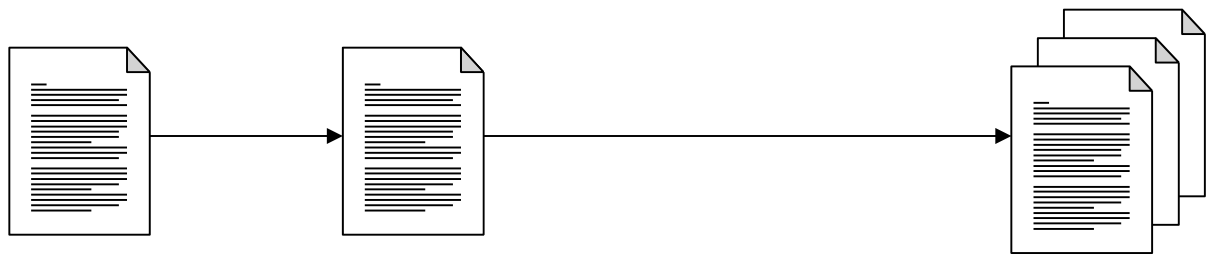
Different types of process can be....

Physical



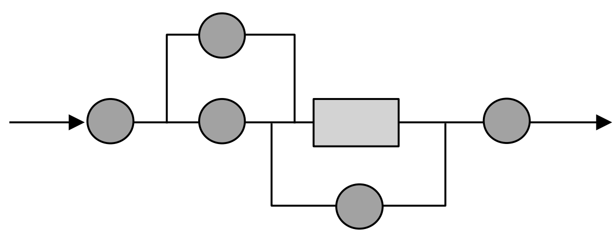
e.g., Materials Supply Chain

On Paper



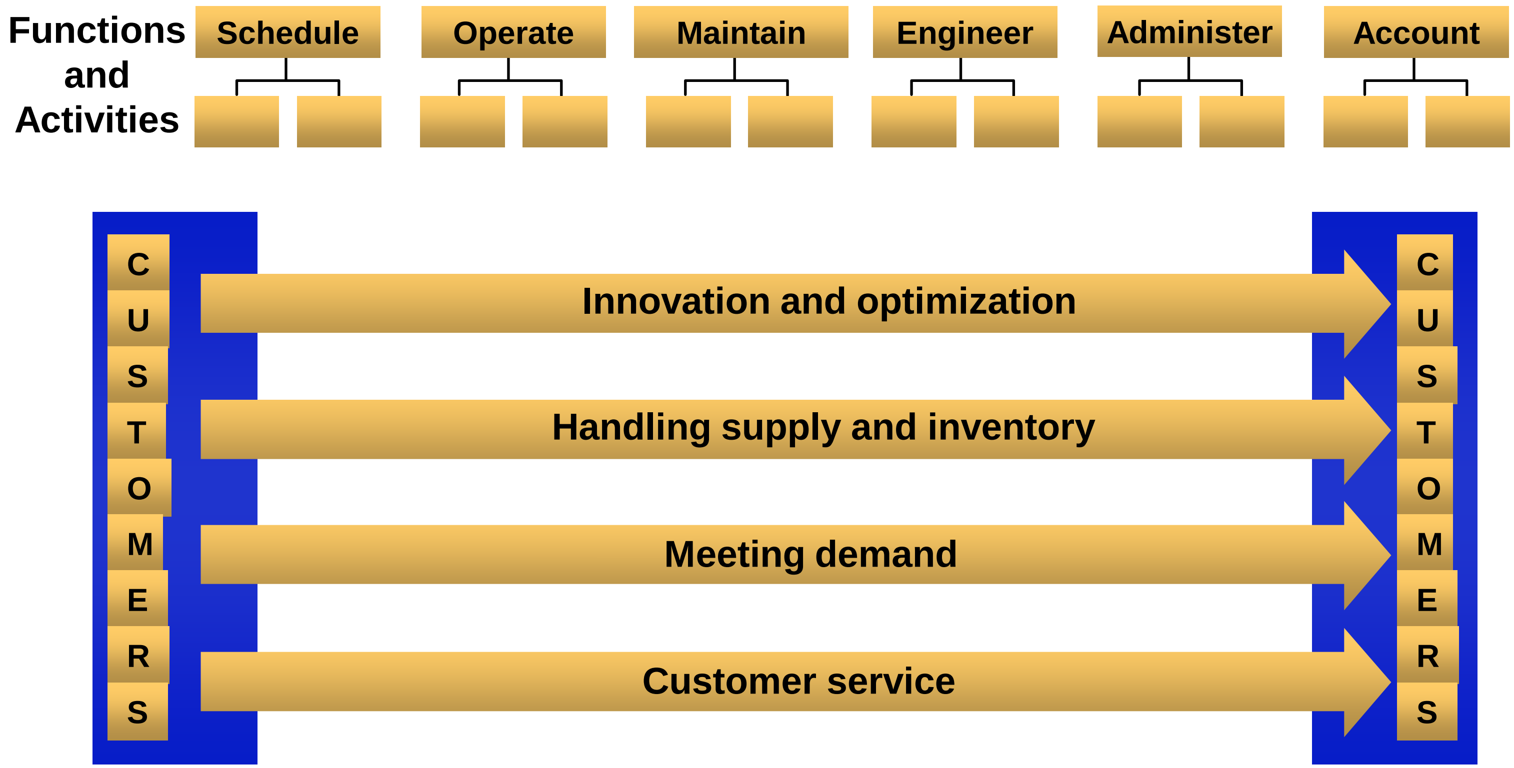
e.g., Bid Preparation

Logical

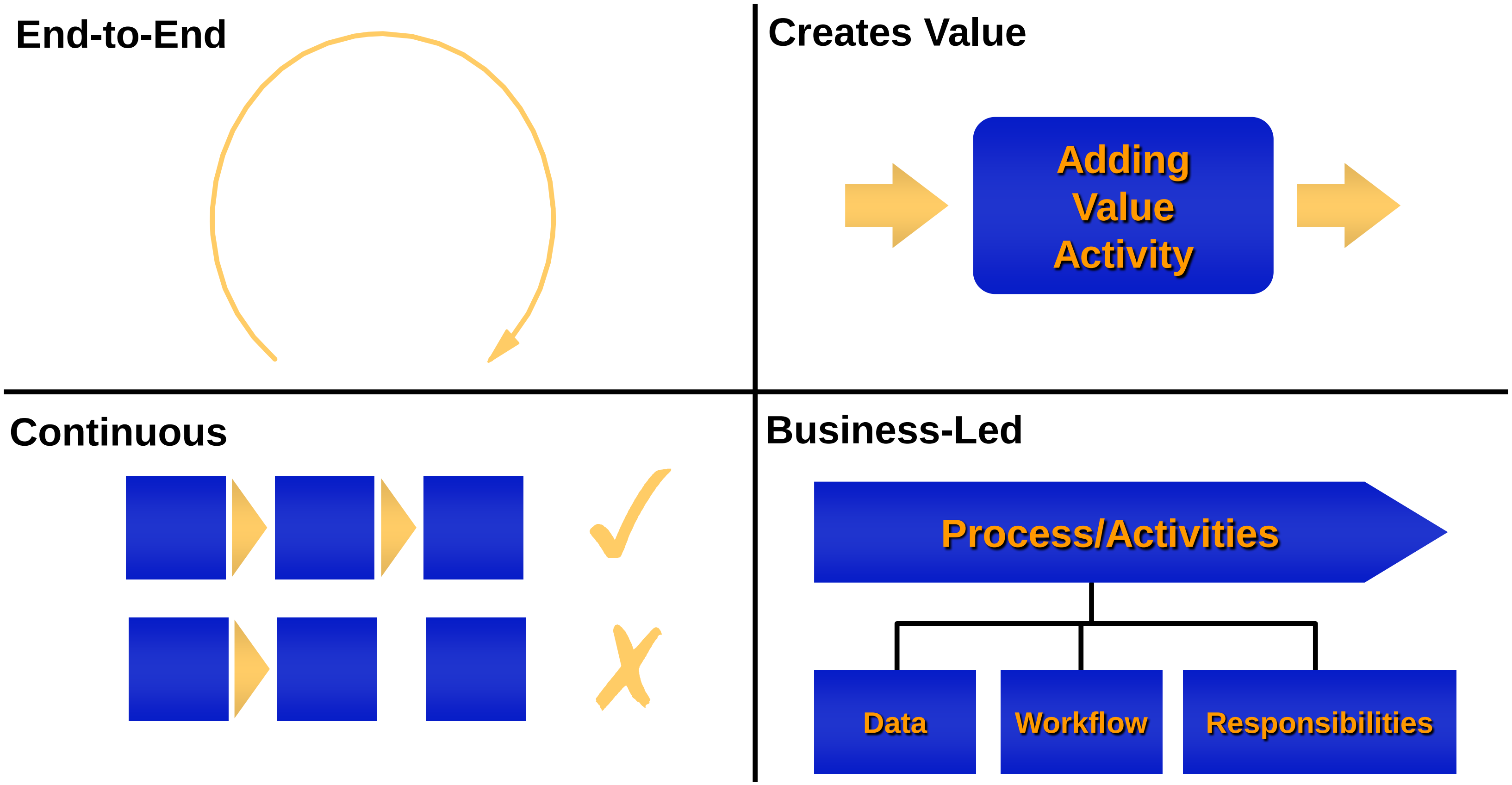


e.g., Order Entry, Procurement

Processes cross functional boundaries



What are the key characteristics of a business process?



Mapping & Modelling

Overview

Purposes Of Process Definition -

- Understand:
  - What and where at Levels 1 and 2
  - What, where and when at Levels 3 and 4
  - How and who at Level 5
- Achieve consensus on how the process is performed
- Illustrate areas for improvement; identify bottlenecks, rework loops, and hand-offs
- Capture appropriate performance measures

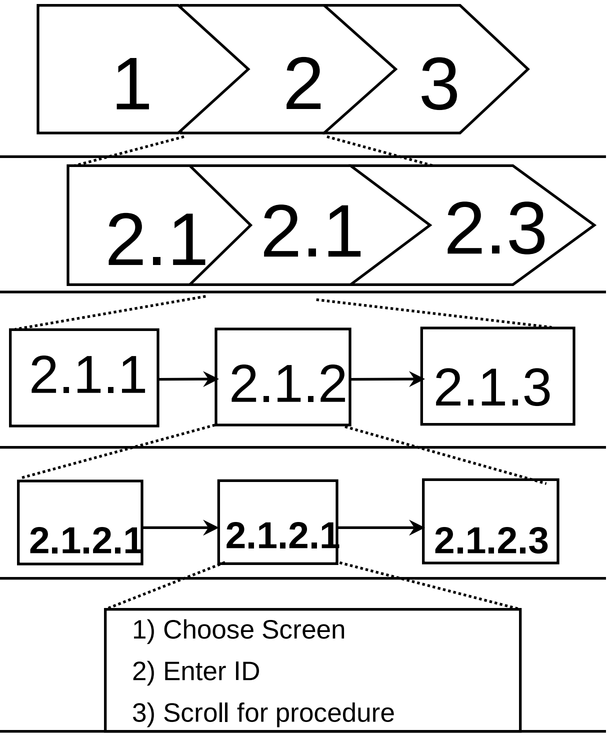
Overview - The Levels of Process Documentation

Levels -

- Organizations typically have numerous processes to provide the goods and services required by their customers
- These processes can be "rolled up" into higher level processes
- For ease of understanding and documentation, processes are defined in terms of layers known as levels
- Levels define processes in varying degrees of detail from a high organizational level (Level 1) to a detailed step level (Level 5) as shown on the next page

The Levels of Process Decomposition

Level 1	**Value Chain**	Top Level Map of the entire organization. Each box represents a business process chain. A business process chain is group of linked (serial or parallel) processes.
Level 2	**Process Chain**	Process Chain Map of one of the level one chevrons. Each box represents a group of sub-processes.
Level 3	**Process Map**	At this level physical work is represented. Each box represents a group of activities which produce an outcome. Analysis of existing processes are undertaken.
Level 4	**Activity Map**	This represents a series of activities to make up a process. An activity can be observed.
Level 5	**Step Map**	This represents detailed information about how to complete an activity. Each item is a specific action to be taken—procedures.

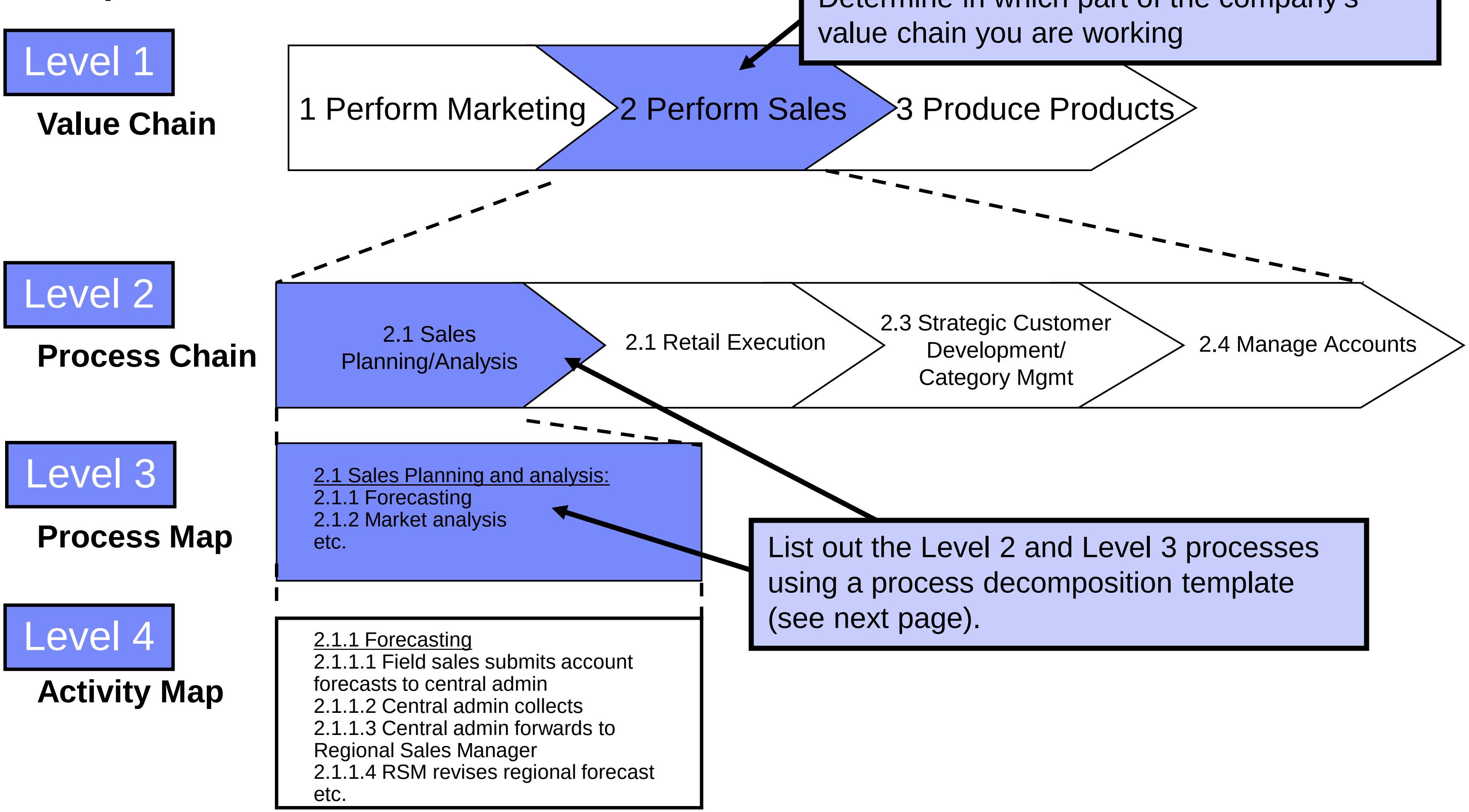


Key Point

To develop and communicate the solutions, level 3 process maps are usually adequate, except for the areas requiring step by step detail

Process Decomposition Illustration

Example of Level 1-4 Processes



Sample Process Decomposition Template

Illustrative

Level 1 Process	Level 2 Sub-processes	Level 3 Sub-processes	Level 4 Sub-processes	Priority *Process* H-M-L	Team (F/S)	Interview Done? (Y/N)	Doc. Done? (Y/N)	In Scope (Y/N)
1.0 Perform Marketing	1.1 Brand Management	1.1.1 Advertising and Promotional Development		L	F&S			
		1.1.2 Performance Planning Analysis-Commercial		H	F&S	**Y**		
		1.1.3 Performance Planning Analysis- Financial		H	F&S			
	1.2 Promotion Program Management	1.2.1 Development		L	F&S			
		1.2.1 Evaluative		L	F&S			
	1.3 Manage Product Packaging			L	F&S			**N**
	1.4 Market Research	1.4.1 Base Business						
		1.4.2 New Products						
2.0 Perform Sales	2.1 Sales Planning and Analysis	2.1.1 Forecasting		H	F&S	**Y**		
		2.1.2Market analysis		H	F&S	**Y**		
	2.1 Retail Execution (Store level)	2.1.1 Manage In-Store Merchandising		H	F&S			

2b) Levels 2 and 3 processes in process decomposition format

Key Point

Process Decompositions and Process Maps are iterative tools—it's good to get "something" on paper and then go back and revise

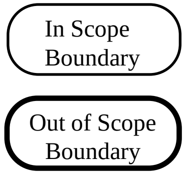
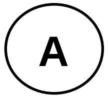
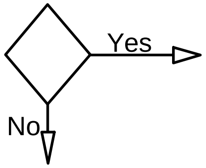
Process Decomposition Guidelines

- Processes can be documented at various levels of detail—when should you keep digging, or exploding the process map?
  - The documentation process should be done rapidly, especially for the “As-Is” situation
  - “As-Is” process mapping should stay at a high-level except where an activity warrants further exploration
  - “To-Be” mapping must go into detail in areas that are going to be changed
  - The criteria for deciding when it makes sense to dig deeper into a process step may be the same as the criteria for deciding which problem to solve:
    - Significant potential for cost reduction
    - Significant potential for improving customer service
    - Large impact on other areas
    - Many known problems in the activity
    - Visible within the company or to external customers
    - An area that takes the majority of the time
    - Key areas of disagreement within a process
  - Complex maps suggest improvement opportunities

Potential Pitfall

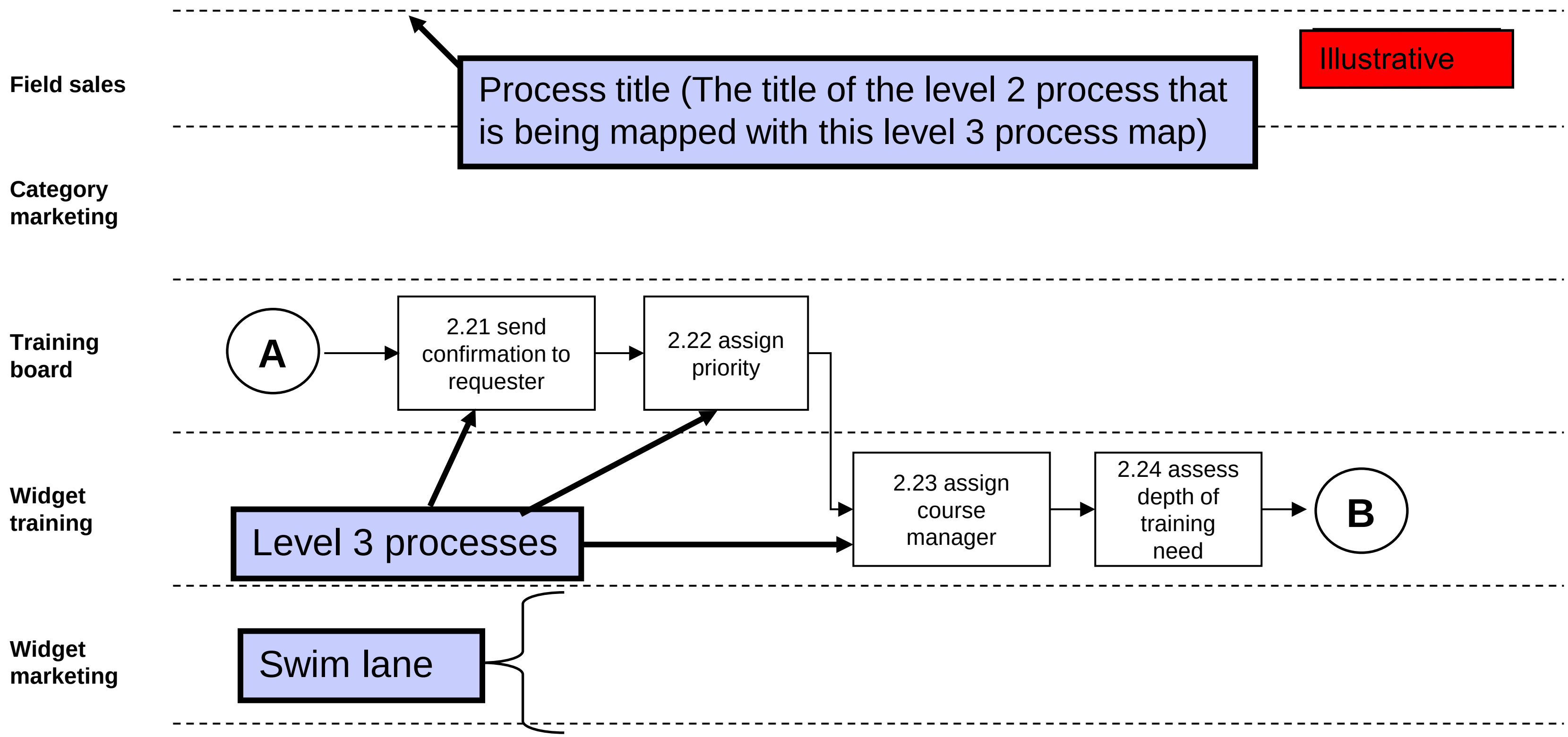
Digging deeper in too many areas may produce so much data that it overwhelms our ability to make timely decisions. It is quite easy to get “bogged down” with details

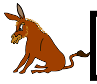
Recommended Process Map Symbols

Process		Group of linked activities - indicates further detail is provided
Activity		Action in the process that is manually performed - no further detail is provided
System Activity		Task or action in the process that is enabled by a system (enter data, run program)
Boundary		Shows either other processes that bound current process, or information flow between the process and any external entity (i.e. marketing, customer)
Linkage		Connector point to another activity on another page, or on the same page to avoid unnecessary complexity (use A, B, C, etc.)
Outputs		Label on line indicates what outputs go to subsequent activities
Decision Point		Process branching decision point - arrows labeled yes or no only

“Swim Lanes” are used to show responsibilities

Sales Training Process—2.2 design phase



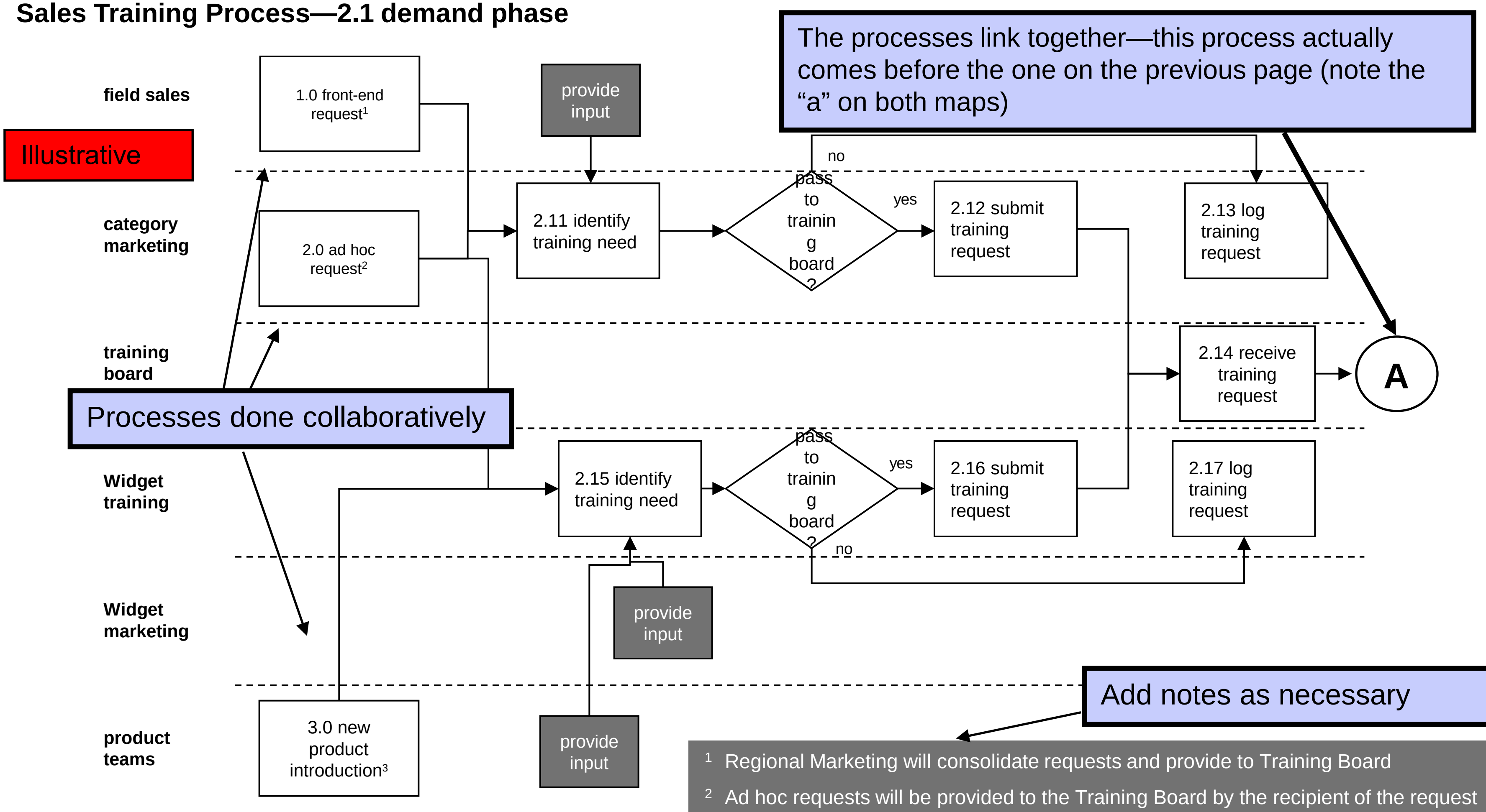


Potential Pitfall

Tie responsibility to a real name in addition to a position name wherever possible. Just getting commitments that a “group” will be responsible may not be enough to ensure that agreed upon actions will be taken

Design of New Processes – Mapping Tips

Sales Training Process—2.1 demand phase



1 Regional Marketing will consolidate requests and provide to Training Board

2 Ad hoc requests will be provided to the Training Board by the recipient of the request

3 Widget Training will provide product roadmap to Training Board

Design of New Processes – Process Narrative

Instead of notes on the process maps, a Process Narrative page can be used to provide additional details on key processes

3.1—Manage "New Product Introduction" Cycle
Process Narrative—Brief descriptions of selected process steps

Illustrative

3.1.2 **"Prepare draft plan and calendar for this cycle"**: Review dates with everyone who must fulfill a specific responsibility, e.g., individuals in Marcom who create sales tools.

3.1.3 **"Prepare web pages for cycle"**: Create pages to support this cycle. List products that are tentatively targeted for this cycle.

3.1.5 **"Finalize plan and publish overall timeline":** This plan should include key milestones, both WW and Regional. It should also include leverageable launch opportunities with partners (within client or external to client).

3.1.6 **"Prepare and distribute *Call for Content*"**: Include key milestones in the *Call for Content*. Distribute this document to all Future Product Managers, copying all Current Product Managers. Post it on the website.

3.2.4 **"Make Go/No Go decision for each product or solution"**: The criterion for this initial decision is whether the Future Product Manager has submitted the three preliminary content documents by the deadline documented in the *Call for Content* for this Launch Window.

3.2.6 **"Post Internal Presentation on NPI website"**: After each posting, the Webmaster will send out a "notification email" to a distribution list of all participants in the current launch cycle, including individuals in worldwide and regional marcom and others in the regional product operations.

3.2.7 **"Post Data Sheet and External Presentation on NPI website"**: After each posting, the Webmaster will send out a "notification email" to a distribution list of all participants in the current launch cycle, including individuals in worldwide and regional marcom and others in the regional product operations.

3.3.1 **"Develop draft strategic market messages for this cycle":** The WW Marcom Manager will incorporate multiple inputs when developing the strategic messages for a specific cycle. These inputs may include the key Strategic Direction for the cycle (furnished by senior staff), the strategy and plan for this specific cycle (furnished by the NPI Launch Manager), and product content (furnished by Future Product Managers).

Documentation - Process Summary (a.k.a. SIPOC)

Documentation –
Process Summary (*a.k.a.* SIPOC)

Description -

SIPOC

- Stands for Supplier, Inputs, Process, Customer, Outputs
- Is used to completely define a process by providing more detail than can be conveyed with a process map alone
- Can be used as a starting point to a process map
- Is used in conjunction with level 3 maps
- Can be used to document level 4 and level 5 as an alternative to the procedure Documentation

Documentation – Process Summary (*a.k.a.* SIPOC)

Steps -

- Identify process customer(s)
- Identify process supplier(s) or “trigger event(s)” - e.g., “Month end”, “Year-end”, “Request cycle count”
- Identify process inputs and outputs
- Identify the process steps necessary to convert inputs to outputs
- Include the inputs and outputs of each process/task in the Process Summary
- Identify 3 to 5 well-defined performance measures for each Level 3 process (e.g. cycle time, service level).
- When describing a task in a Level 3 SIPOC, also note when more detail exists in the corresponding Level 4 procedure/SIPOC (e.g. “See Level 4 detail 2.10.40 for more information”)

Documentation – Process Summary (*a.k.a.* SIPOC)

Sample Template for SIPOC

Process Name: ______________________ **Purpose:** ______________________

Suppliers
1.
2.
3.

Systems & Info

Major Process Steps

Resources

Customers
1.
2.
3.

Inputs
1.
2.
3.

Outputs
1.
2.
3.

Cycle Time:

Performance Measures:

Transaction Volumes:

Documentation –
Process Summary (*a.k.a.* SIPOC)

Sample Interview Guide -

An interview with the process owner used to gather information about a process.

- What is the Process's name and what is the purpose/objective of the process?
- How is the process managed?
- What are the key activities associated with the process?
- What are the key outputs?
- Who are your primary suppliers (internal and / or external)? What do they provide to the process?
- How do you measure your suppliers' performance? What are your requirements? What do they do well? What should they improve?
- Who are the process's primary customers (internal and / or external)? What does the process provide them?
- What are your customers' requirements? How do your customers measure your success / performance? What is done well in the process? How does the process need to improve? What is your competition / best-in-class doing?
- How is process performance evaluated? What tools (technology / software) enable you to complete your tasks?
- What (if any) obstacles exist in performing the process?

Documentation – Process Mapping

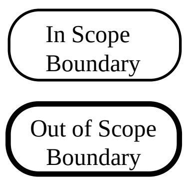
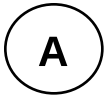
Process Maps

Description

Graphical representation of the movement of material and information between activities, people, and functional groups. Graphically depict:

- steps needed to transform process inputs into outputs and their sequence of execution;
- decision points to represent the business process logic applied to inputs, outputs, and step activities;
- suppliers and customers of the given process;
- hand-offs of material and information between different work groups, e.g. divisions, departments, or functional domains.

Process Mapping – Free form Symbols

Process		Group of linked activities - indicates further detail is provided
Activity		Action in the process that is manually performed - no further detail is provided
System Activity		Task or action in the process that is enabled by a system (enter data, run program)
Boundary		Shows either other processes that bound current process, or information flow between the process and any external entity (ie marketing, customer) - a boundary or “trigger event” must begin and end every level 3 process
Linkage		Connector point to another activity on another page, or on the same page to avoid unnecessary complexity (use A, B, C, etc.)
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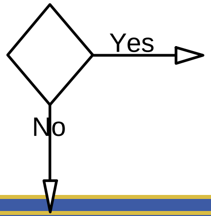
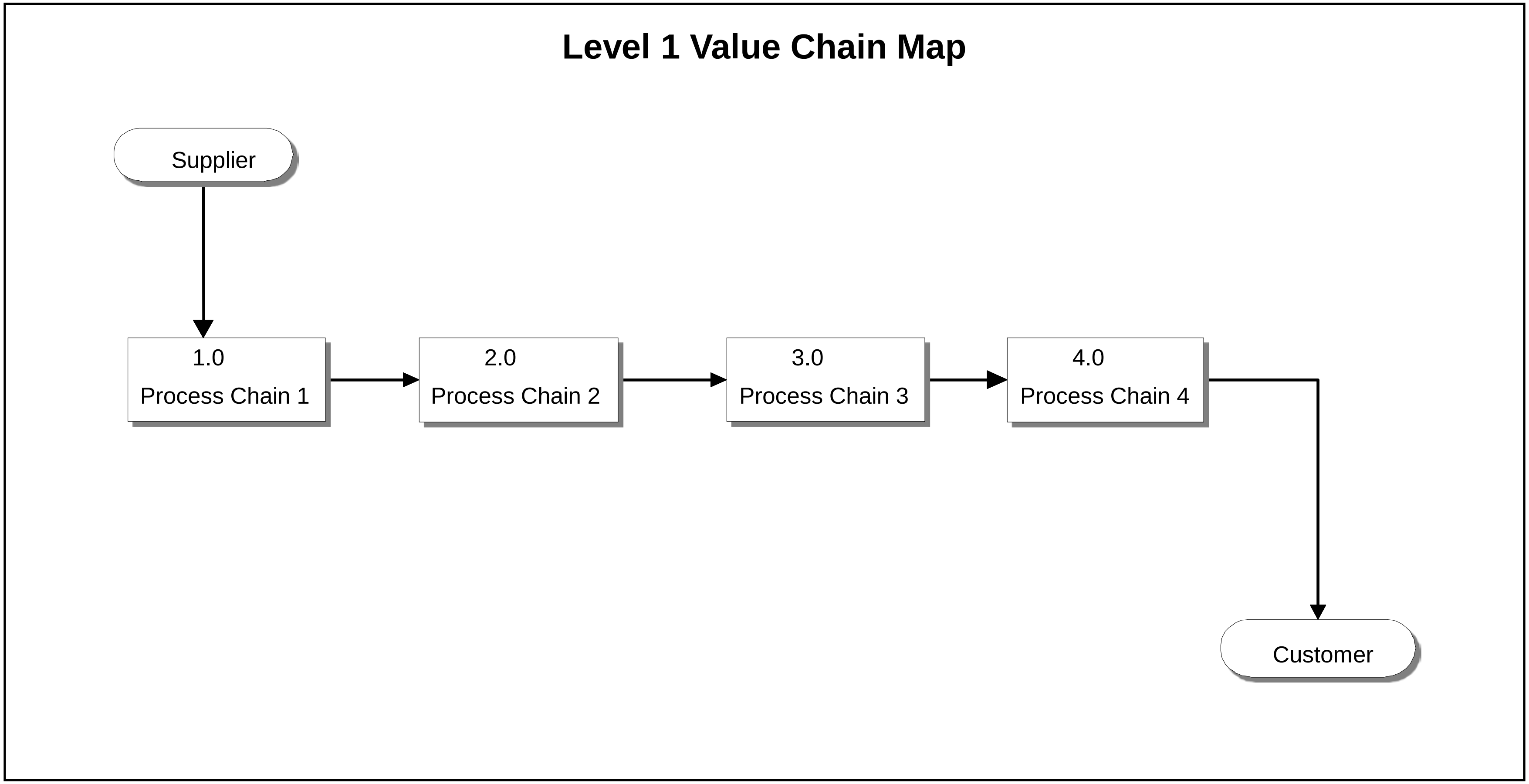
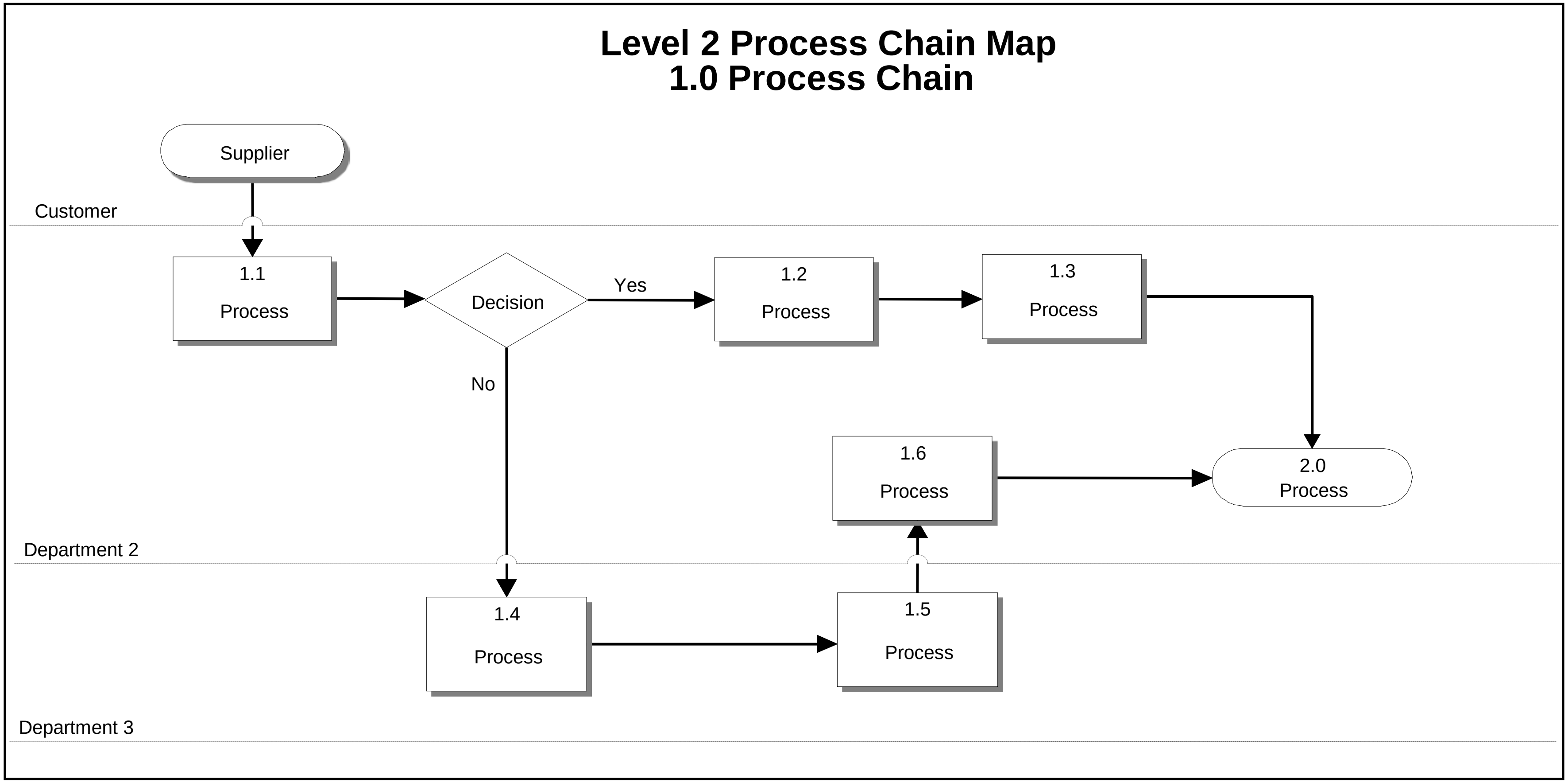
Decision Point		Process branching decision point - arrows labeled yes or no only

Free Form Mapping - Level 1



Process Maps

Free Form Mapping - Level 2



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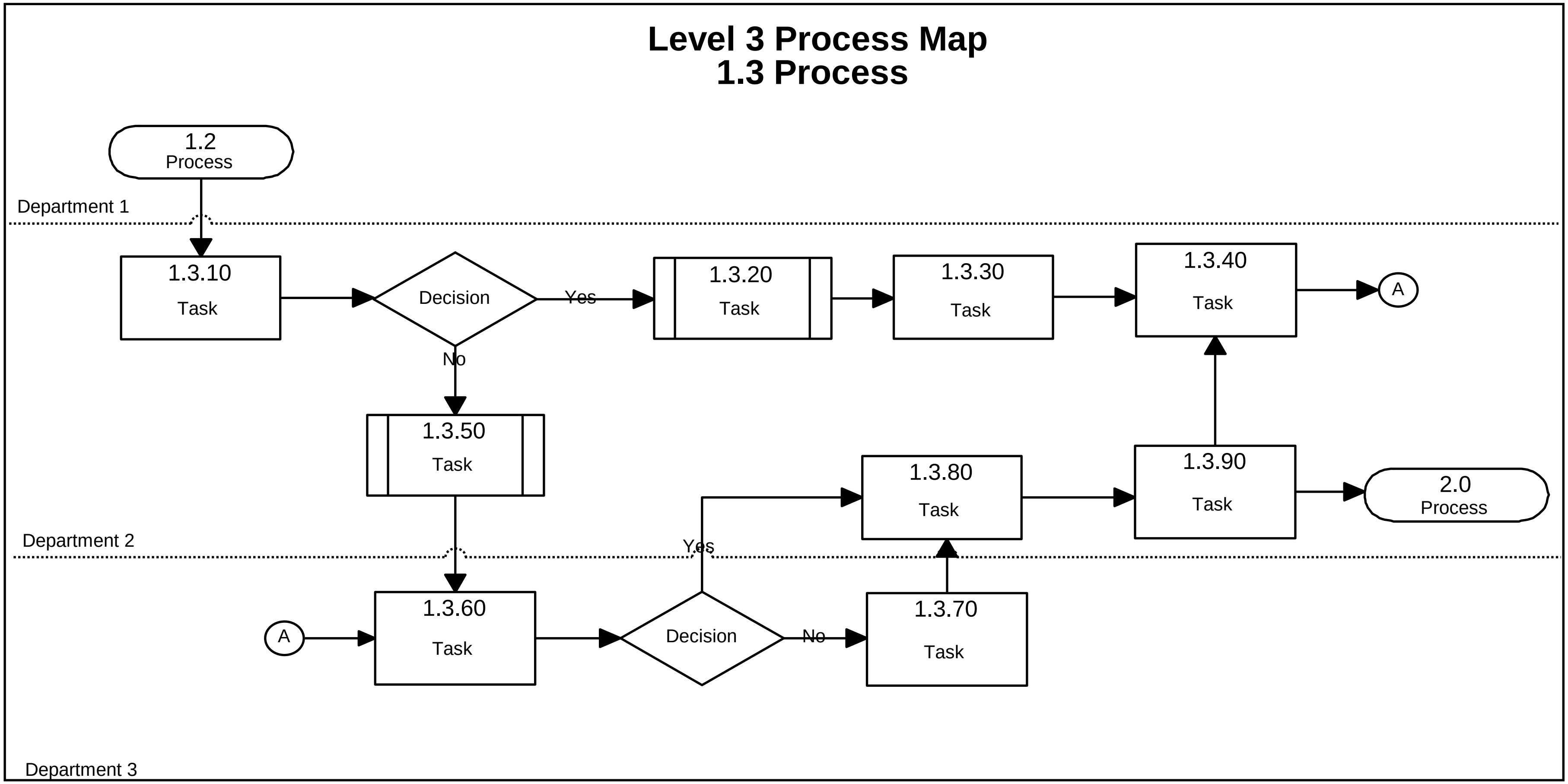

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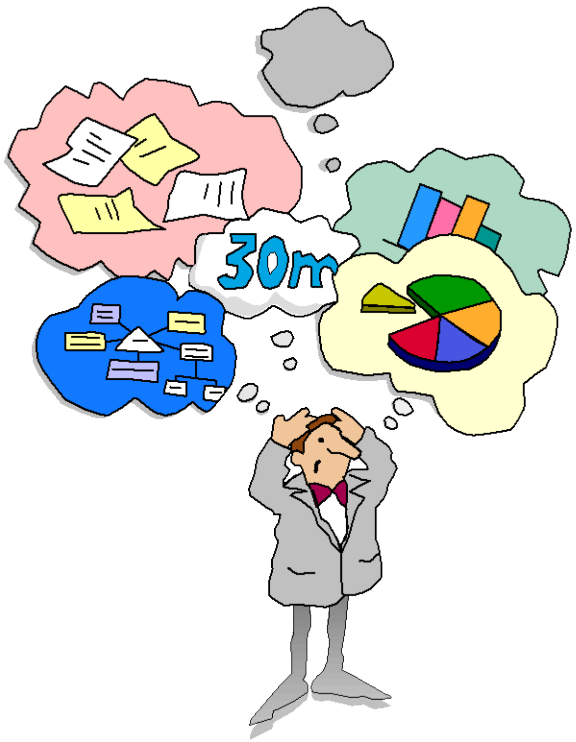
Questions?



BUSINESS
information
SYSTEM

Facilitating
BPR Tiger Teams

Agenda

- Purpose
- BPR Tiger Team Goals
- Challenges
- Facilitation Tips
- Facilitating BPR Workshops
- Basic Visio Overview

Purpose

- Provide guidance in facilitating a BPR Tiger Team
- Provide an understand BPR Tiger Team Goals
- Understand BPR Challenges
- Provide General Facilitation Tips
- Provide Tips for Facilitating BPR Workshops
- Provide Tips on Utilizing Visio to Document Processes

Pulling Together!!

The goals of the Tiger Team are to document the Business Process by:

- Understanding:
  - What and where at Levels 1 and 2
  - What, where and when at Levels 3 and 4
  - How and who at Level 5
- Achieving consensus on how the process is performed
- Illustrating areas for improvement; identifying bottlenecks, rework loops, and hand-offs. Where possible the Team will resolve these issues and build the improvements into the new process.
- Developing “Straw-man” Business Process

Challenges

- BPR must be done quickly to meet aggressive timelines
- Many personnel will not have the requisite skills in BPR methodology and/ or tools such as Visio
- Lack of skills in either BPR methodology and/ or tools such as Visio should not be an excuse for Functional Areas not participate in BPR
- Solid documented processes are critical for success
- This briefing will serve as a Primer to conducting BPR workshops

General Facilitation Tips

Facilitation: What is it?...

Fa•cil•i •ta •tion, *n. the act of making easy or easier*

The challenge is to get the participants to clearly define a business problem, and most importantly build agreement on the solutions, answers and action steps.

Problem -- Solution -- Implementation

If you can't agree on the problem, you probably won't agree on the solution.

Facilitation: What it is ...

- A structured time-boxed series of activities
- An objective that is stated at the beginning
- Includes and involves a number of selected participants
  - BPR Tiger Team(s)
  - Functional SME Teams

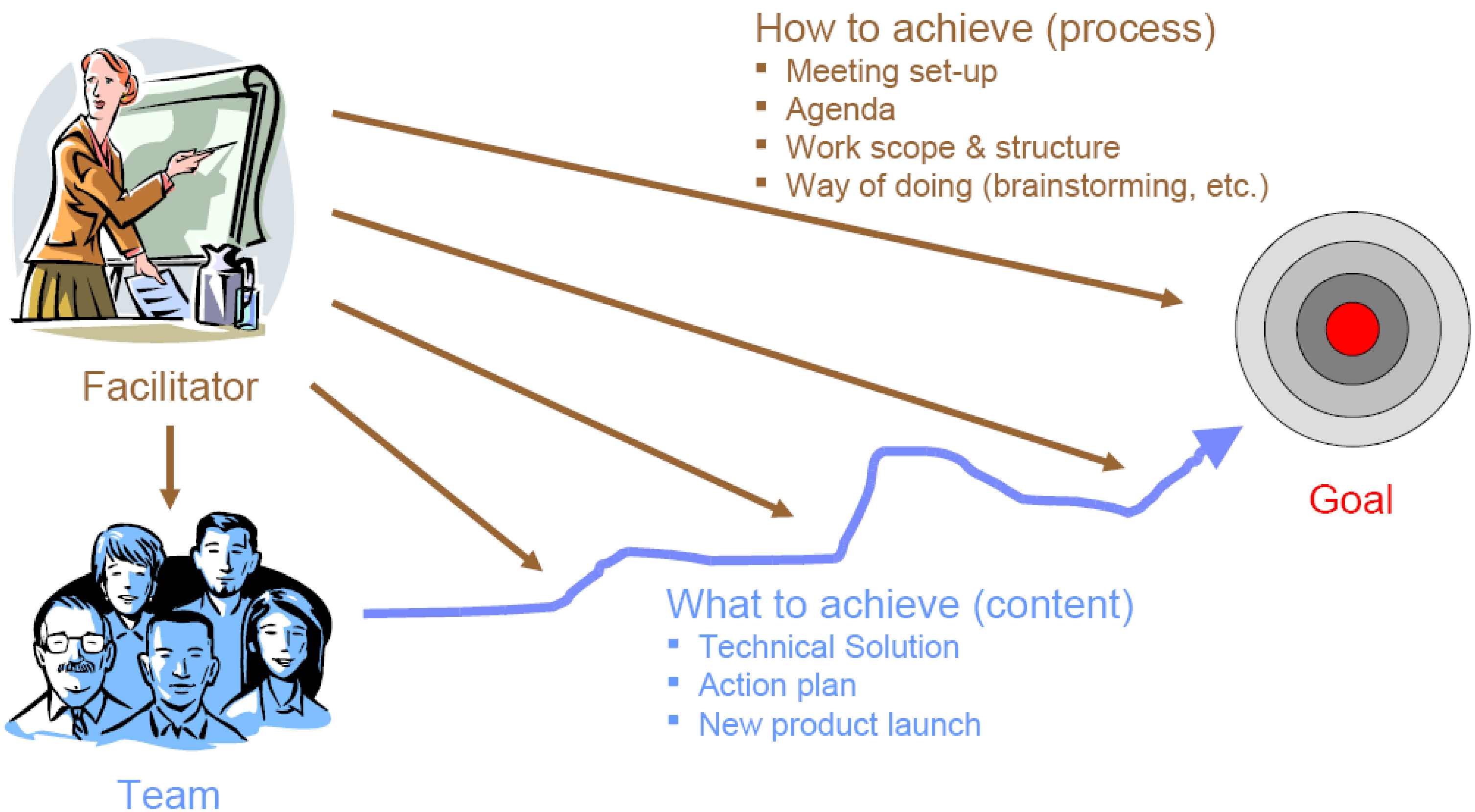
When are facilitated sessions appropriate?

- When communication and teamwork are critical success factors
- When there are time constraints
- When input and consensus on business issues and definitions has to be attained
- When a team must produce a preliminary product in a short time frame

All of these are appropriate to the BPR Tiger Teams!!

What a facilitator does ….

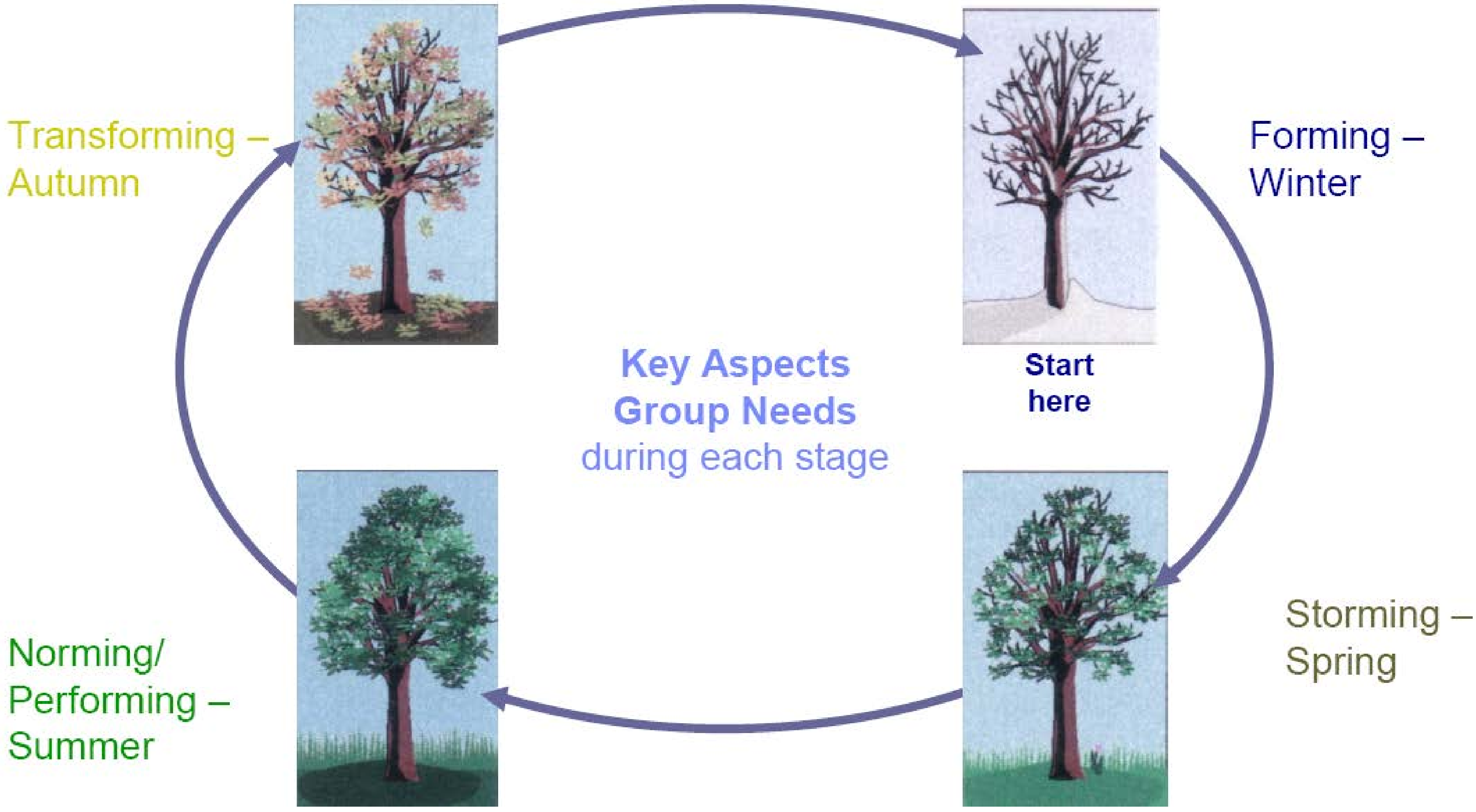
In all these definitions, the underlying concept is that the facilitator is responsible for the process, not the content of a meeting.



Benefits of Facilitation

- Consensus on important decisions can be attained more easily and faster because appropriate decision makers are gathered in the same place
- Lines of communication are opened between functional organizations
- More client involvement early on in the project
- Better understanding of the business AND system requirements by both user and IT
- Eliminates serial interviewing
- Produces a greater volume of work product within the time frame

Stages of Team Development



Adapted from Bruce Tuckman

David Kolb identified a cycle of experiences which everyone goes through as they perceive & process information

- ***Why – what are <u>my</u> reasons for doing this?***
- ***What – am I clear about what's required?***
- ***How – how do I do it?***
- ***What if – now I've done it, what sense can I make of it?***

In terms of a workshop, this translates into the following:

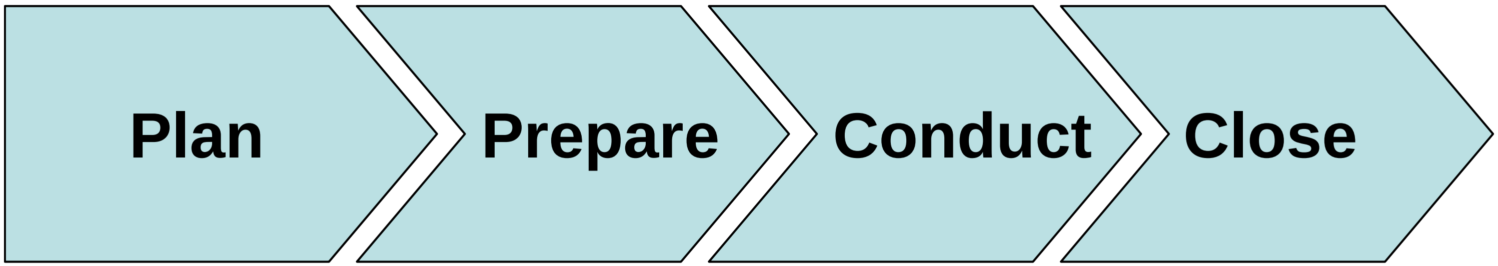
What if What are the implications? What are the applications? What are the risks?	**Why** Why am I doing this? What is the purpose? What are the benefits to me?
How *Introduction:* How shall we do it? What ground rules do we need? *Workshop session:* Discussing the topic	**What** What is the goal? What topics need covering? What is the output?

- *People need to go through the sequence Why/What/How/ What if/.*
- *Most people have a preference for one of the quadrants over the others.*

Kolb operates at multiple levels in a workshop: the entire workshop, each session within it, and indeed every time the group needs to do something.

Step	Kolb	
Opening a Workshop	Why	Buy-in to workshop
	What	Clarity about goals, topics to be discussed and in what order, deliverable, scope, priorities
	How	Practicalities; how are we going to operate (e.g. ground rules)
Workshop Session	Why	Purpose of session
	What	Agenda & deliverable for session
	How	Session tuning; letting discuss take place, intervening if it goes off track, suggesting extra ground rules
	What If	Check for practicalities (e.g. have we finished? Consolidation of agreements, issues)
Closing a Workshop	What if	Action planning

Facilitation starts from a solid model for conducting an effective meeting



There are critical task done at each stage of the meeting for it to be successful

Plan

Plan | Prepare | Conduct | Close

- Rule #1 - Understand what the business problem is you are attempting to solve
  - Discuss the requested session with the Project Leaders & Sponsors
  - Determine the scope and objectives
  - Decide who should/will participate
  - Draft an initial agenda and review with Project Leader(s)
  - Draft detailed agenda - what is being done, how & why, what the desired outcome is, and how long each agenda item should take
- Invite a neutral facilitator to sensitive meetings

Prep – Bring the MAPS!

1. **Materials** Bring relevant handouts, minutes from the last meeting, a flip chart, tape, markers, drinks or snacks, etc to the meeting. Get help from other folks in your preparation.
2. **Agenda** At every meeting, clear goals and an agenda should be set beforehand. Ask people for input on the agenda and confirm it with people beforehand. Set time limits for each agenda item and try to stay under 1.5 hours for the whole meeting.
3. **People** Get the right people in the room. Remind everyone who needs to be there more than once, including once the day before the meeting. Ask a different person to be responsible for preparing and introducing each agenda item. Having multiple voices leading the meeting will make everyone feel more welcome.
4. **Space** Reserve a comfortable space for the meeting. Pay attention to temperature, arrangement of chairs, insulation from noise, bathrooms, and windows.

Conduct the Meeting

- Remember, meetings should be enjoyable, efficient, and build organizational morale.
- Be sure to start and end on time.
- Review ground rules at start of meeting (Pg 76 for example)
- Assign, at minimum, a note-taker and a timekeeper to help the facilitator/ leader move the agenda along.
- Review the agenda at the beginning of each session and as appropriate
- Explain each activity before it is started
- Cover topics quickly as planned; when stalled, facilitator/ leader may ask group to record "Parking Lot" item and move on
- Remain flexible in activities, timing and agenda, because THINGS WILL CHANGE!

Conduct the Meeting (cont.)

- Use appropriate facilitation tools to get the most out of the voices in the room. Use a go-around to make everyone heard, for larger groups small breakout groups to generate lots of ideas quickly. Silence is good sometimes, but silence is not golden. Get everyone involved: “Joe, what do you think?”
- If you have a facilitator, the facilitator must remain neutral and strong enough to steer the group but not so strong as to dominate the interaction

Conduct the Meeting (cont.)

Example: Ground rules

- **Participate –** Minimize other business
- **Listen** –
  - One conversation at a time
  - Give others a chance to speak
  - No side conversations
- **Respect** each person's views
- **Challenge –** The norm … "the way we've always done it"
- **Share** – Your experience, thinking and observations
- **Turn off** – Phones / pagers / laptops / Blackberries

Get team to agree to a set of ground rules at start of meeting

Close the Meeting

Plan → Prepare → Conduct → Close

- Spend a few short minutes recapping your plan of action at the end of the meeting. Did you meet your goals?
- What are the next steps? Who's doing what? Answer these questions quickly and remind everyone to read the meeting minutes
- Many teams like to spend 5 mins doing +/- on a flip chart (i.e. What we did right at the meeting? What can we could do to improve?)
- Assign roles for next time and schedule the next meeting.
- Always leave on a positive note. If all else fails, don't be afraid to make up a brief enticing and inspirational story even if it isn't true. Sometimes the process is more important than the content.

Tools

- **Parking Lot** - Items that come up during a session that may or may not be related; if uncertainty, record it now, deal with it later

- **Issues List** - Items that come up that are relevant to a successful session, but can't be decided; Must be closed off and resolved

- **Action List** – Items to be accomplished by a specific time. Assign one individual to be responsible for action item, date to be completed,

Problems to watch for

- You lose the group
- A participant “buys out”
- Participants don’t understand the direction or goal
- Participants don’t understand what is going on (the process)
- Ownership or turf issues
- Saboteurs, snipers and personal vendettas

Things to Watch For

- Are people listening to each other?
- Is the group reaching agreement?
- Is the pace too fast? Too slow?
- Is the group clear about the process?
- How are the group members, facilitator and recorder sharing responsibility for managing the meeting?

Encouarge Discussion

Encoding Discussion (cont.)

- Use phrases like:
  - *To what extent, if any ...*
  - *Given the diversity expressed, how can we reconcile...*
  - *I'm not sure I understand. Would you say more?*
  - *Does anyone have something to add?*
- Avoid phrases like:
  - *This is simple.*
  - *This is not rocket science stuff.*
  - *This is obvious*
  - *I think....*
  - *The right way to do this....*

Secrets

Smooth facilitation requires a group in which *everyone*:

- Understands the **goals** of the meeting and the organization
- Keeps the group on the **agenda** and moving forward towards the goals
- **Respects** everyone in the meeting helping to create a space where shy people are comfortable enough to speak, and where people who tend to dominate a discussion feel compelled to defer to others in the group
- Makes sure decisions are made **democratically**, with input from many different voices

Specific BPR Facilitation Tips

Overview - The Levels of Process Documentation

Levels -

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- For ease of understanding and documentation, processes are defined in terms of layers known as levels
- Levels define processes in varying degrees of detail from a high organizational level (Level 1) to a detailed step level (Level 5) as shown on the next page

The Levels of Process Decomposition

Level 1

Value Chain
Top Level Map of the entire organization. Each box represents a business process chain. A business process chain is group of linked (serial or parallel) processes.

Level 2

Process Chain
Process Chain Map of one of the level one chevrons. Each box represents a group of sub-processes.

Level 3

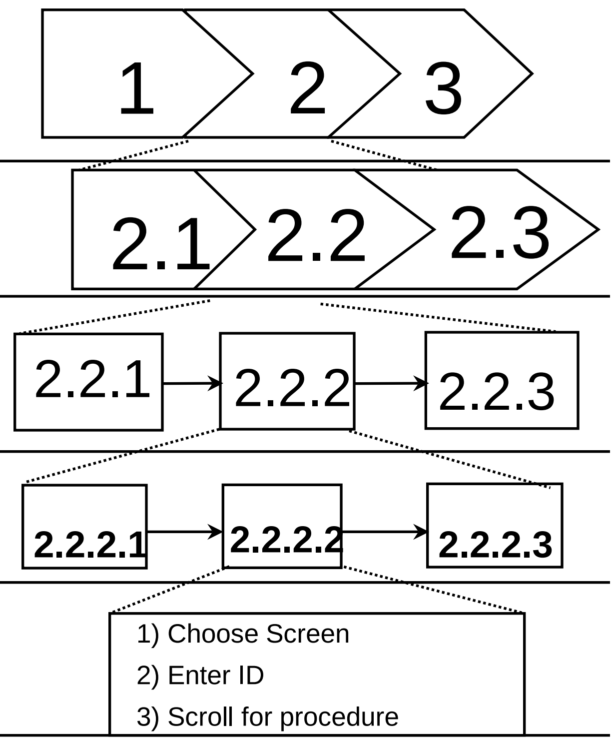
Process Map
At this level physical work is represented. Each box represents a group of activities which produce an outcome. Analysis of existing processes are undertaken.

Level 4

Activity Map
This represents a series of activities to make up a process. An activity can be observed.

Level 5

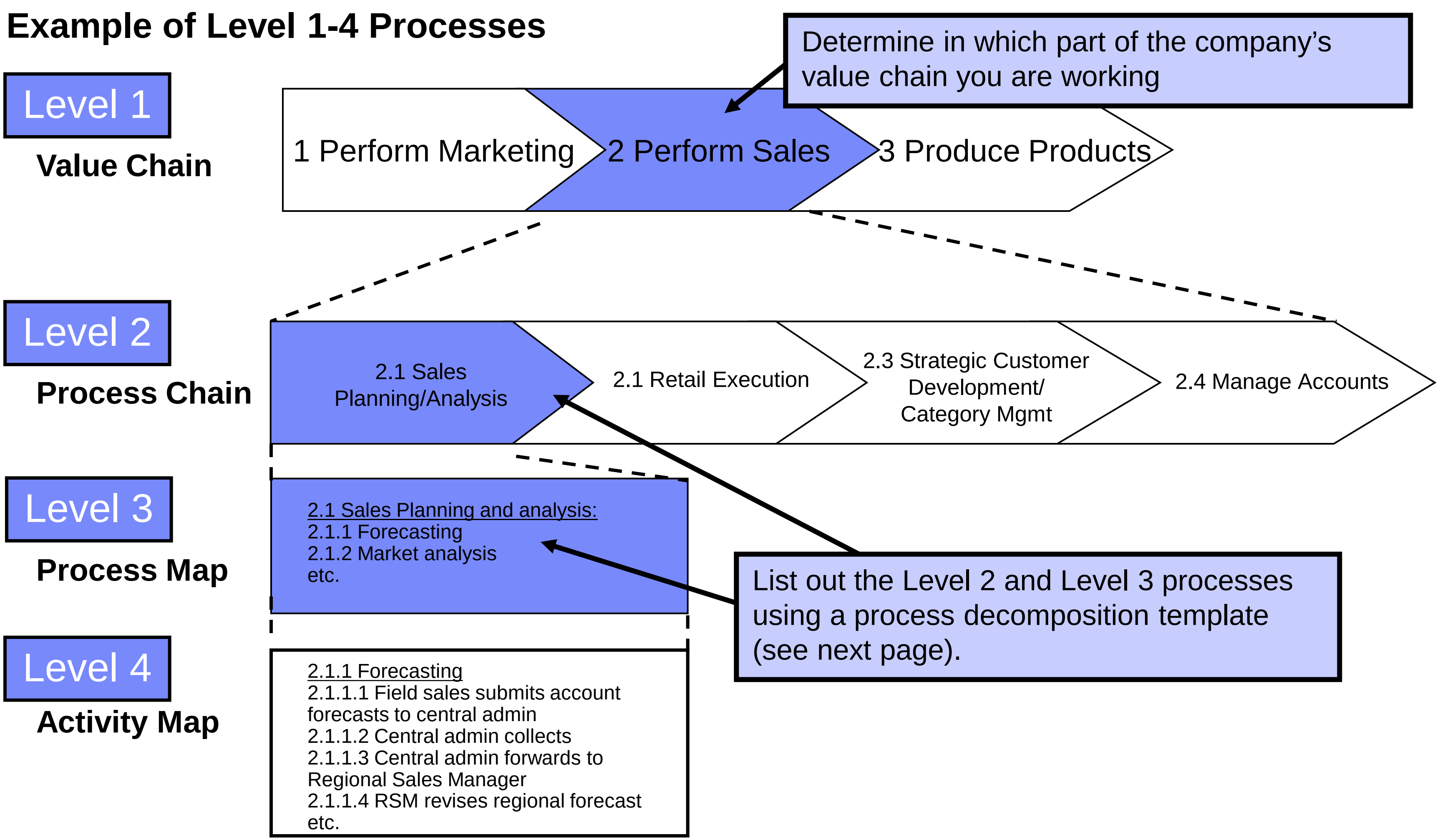
Step Map
This represents detailed information about how to complete an activity. Each item is a specific action to be taken—procedures.



Key Point

To develop and communicate the solutions, level 3 process maps are usually adequate, except for the areas requiring step by step detail

Process Decomposition Illustration



Process Decomposition Guidelines

- Processes can be documented at various levels of detail—when should you keep digging, or exploding the process map?
  - The documentation process should be done rapidly
  - “To-Be” mapping must go into detail in areas that are going to be changed
  - The criteria for deciding when it makes sense to dig deeper into a process step may be the same as the criteria for deciding which problem to solve:
    - Significant potential for cost reduction
    - Significant potential for improving customer service
    - Large impact on other areas
    - Many known problems in the activity
    - Visible within the company or to external customers
    - An area that takes the majority of the time
    - Key areas of disagreement within a process
  - Complex maps suggest improvement opportunities

Potential Pitfall

Digging deeper in too many areas may produce so much data that it overwhelms our ability to make timely decisions. It is quite easy to get “bogged down” with details

Where and How do I start?

Step 1: Start by developing a Process Summary (*a.k.a.* SIPOC)

Description -

SIPOC

- Stands for Supplier, Inputs, Process, Customer, Outputs
- Is used to completely define a process by providing more detail than can be conveyed with a process map alone
- Can be used as a starting point to a process map

Documentation – Process Summary (*a.k.a.* SIPOC)

Steps -

- Identify process customer(s)
- Identify process supplier(s) or “trigger event(s)” - e.g., “Month end”, “Year-end”, “Request cycle count”
- Identify process inputs and outputs
- Identify the process steps necessary to convert inputs to outputs
- Include the inputs and outputs of each process/task in the Process Summary
- Identify 3 to 5 well-defined performance measures for each Level 3 process (e.g. cycle time, service level).
- When describing a task in a Level 3 SIPOC, also note when more detail exists in the corresponding Level 4 procedure/SIPOC (e.g. “See Level 4 detail 2.10.40 for more information”)

Documentation – Process Summary (*a.k.a.* SIPOC)

Sample Template for SIPOC

Process Name: ______________________ **Purpose:** ______________________

Suppliers
1.
2.
3.

Systems & Info

Major Process Steps

Customers
1.
2.
3.

Inputs
1.
2.
3.

Resources

Outputs
1.
2.
3.

Draw the SIPOC Template on a flip chart. Using the questions on Pg. 93 populate the Template. Hint – Use Post It Notes to write data & stick on template.

Cycle Time/ Performance Measures/Transaction Volumes can also be developed

Documentation –
Process Summary (*a.k.a.* SIPOC)

Sample Interview Questions

An interview with the process owner used to gather information about a process.

1. What is the Process's name and what is the purpose/objective of the process?
2. How is the process managed?
3. What are the key activities associated with the process?
4. What are the key outputs?
5. Who are your primary suppliers (internal and / or external)? What do they provide to the process?
6. How do you measure your suppliers' performance? What are your requirements? What do they do well? What should they improve?
7. Who are the process's primary customers (internal and / or external)? What does the process provide them?
8. What are your customers' requirements? How do your customers measure your success / performance? What is done well in the process? How does the process need to improve? What is your competition / best-in-class doing?
9. How is process performance evaluated? What tools (technology / software) enable you to complete your tasks?
10. What (if any) obstacles exist in performing the process?

Documentation – Process Mapping

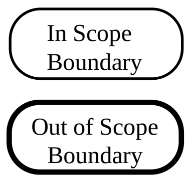
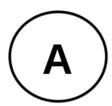
What are Process Maps?

Description

Graphical representation of the movement of material and information between activities, people, and functional groups. Graphically depict:

- steps needed to transform process inputs into outputs and their sequence of execution;
- decision points to represent the business process logic applied to inputs, outputs, and step activities;
- suppliers and customers of the given process;
- hand-offs of material and information between different work groups, e.g. divisions, departments, or functional domains.

Process Mapping – Free form Symbols

Process		Group of linked activities - indicates further detail is provided
Activity		Action in the process that is manually performed - no further detail is provided
System Activity		Task or action in the process that is enabled by a system (enter data, run program)
Boundary		Shows either other processes that bound current process, or information flow between the process and any external entity (ie marketing, customer) - a boundary or “trigger event” must begin and end every level 3 process
Linkage		Connector point to another activity on another page, or on the same page to avoid unnecessary complexity (use A, B, C, etc.)
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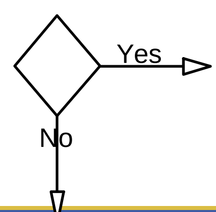
Decision Point		Process branching decision point - arrows labeled yes or no only

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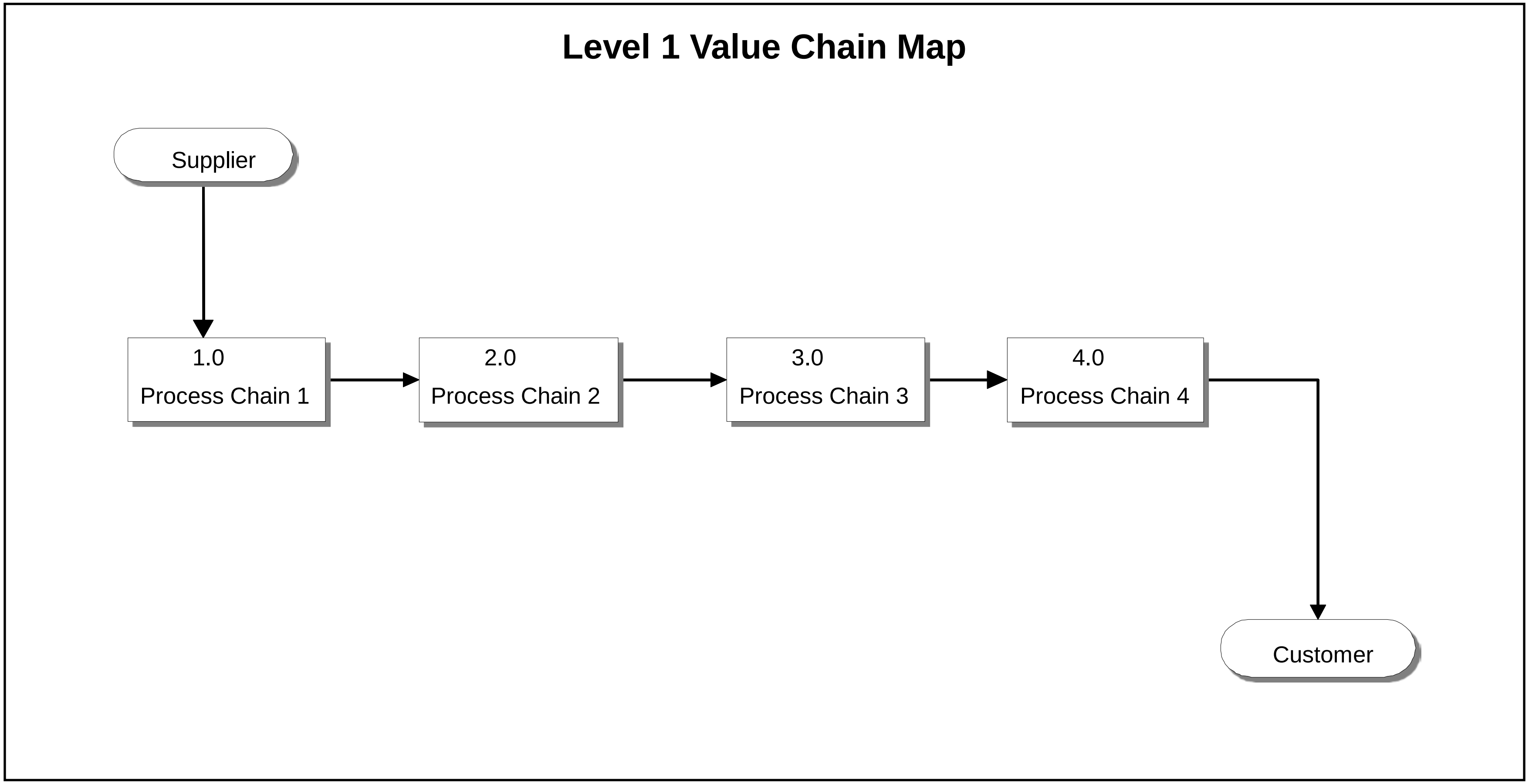

Process Maps

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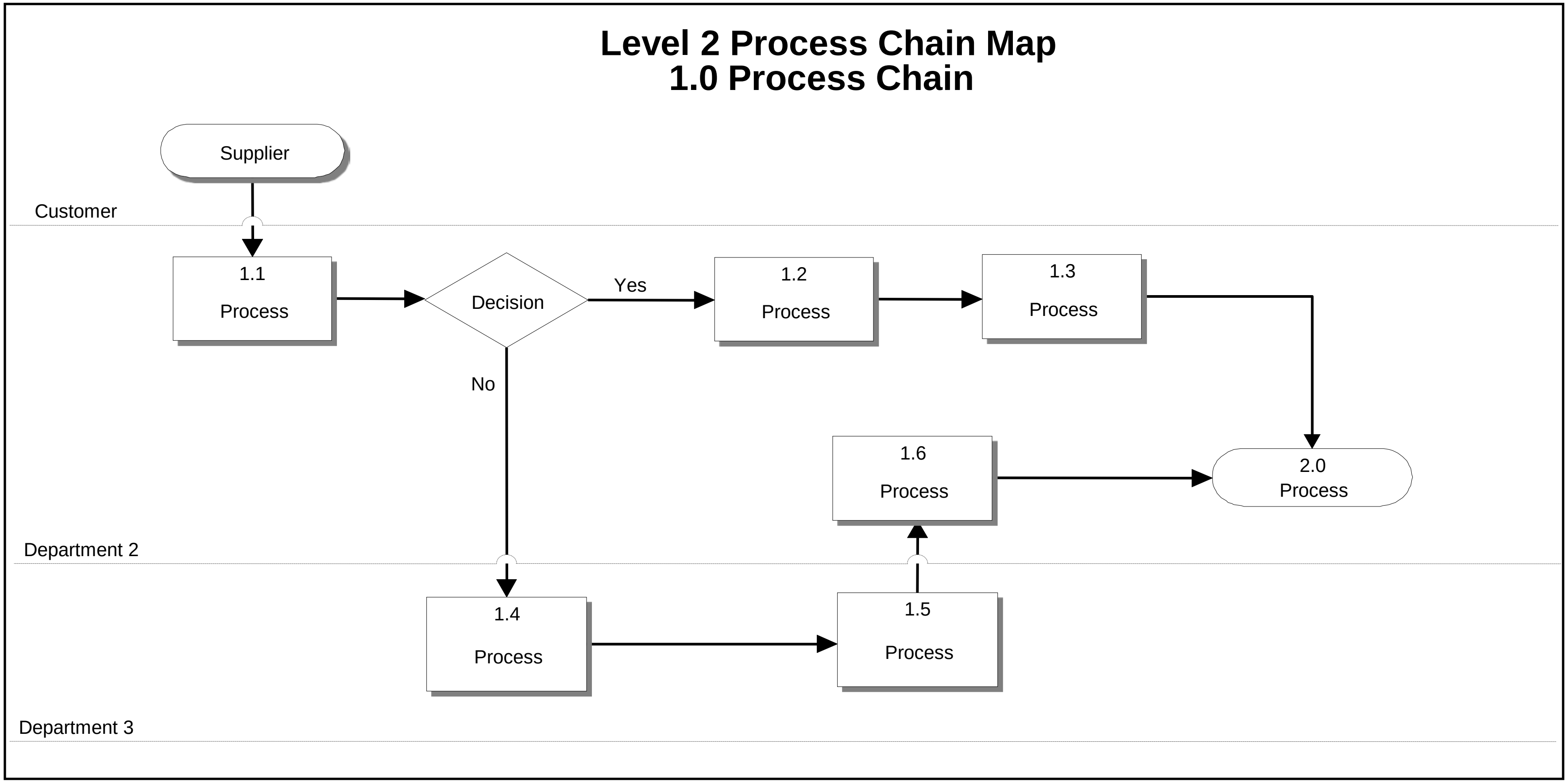
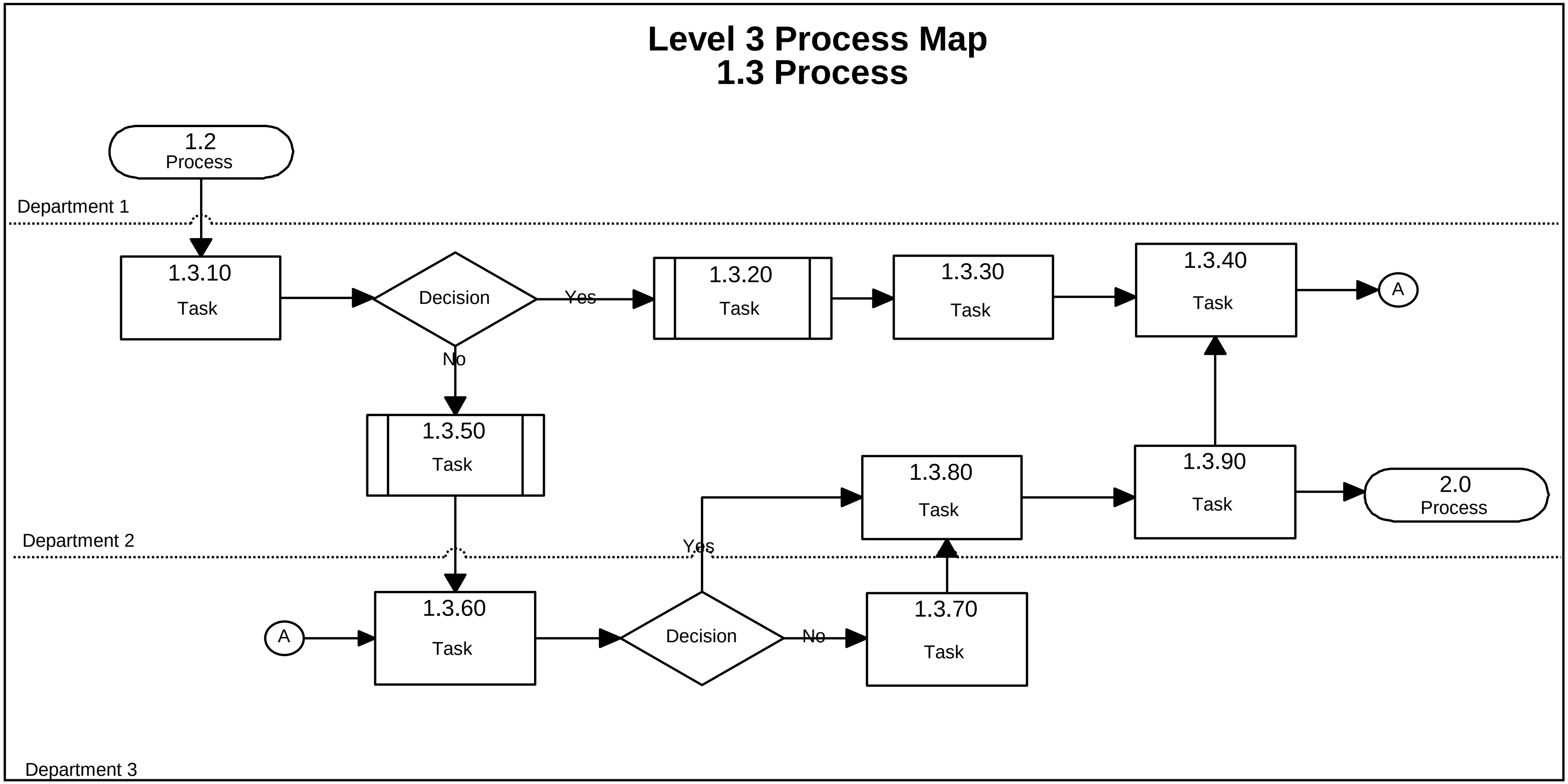


Free Form Mapping - Level 3



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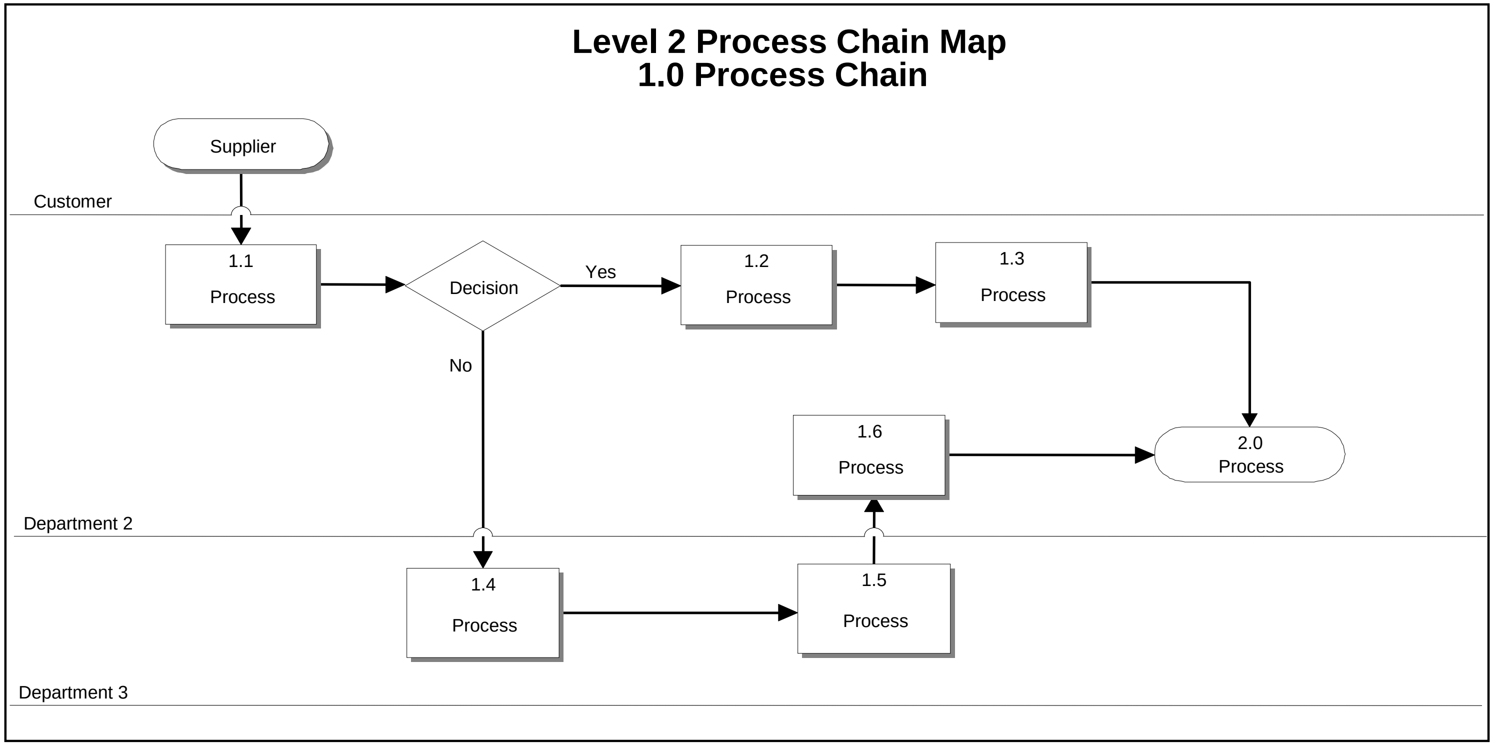
Step 2: Develop Level 2 Process Map

- Draw “Swimlane” chart on a Flip Chart & post on Wall
- Determine what areas are invoked in the process – this will define the swim lanes
- Define the 3 - 6 sub-processes that make up the process
- Use Post It Notes to show flows – follow guidelines on Pg 44-45
- Transfer diagram to Visio Template.



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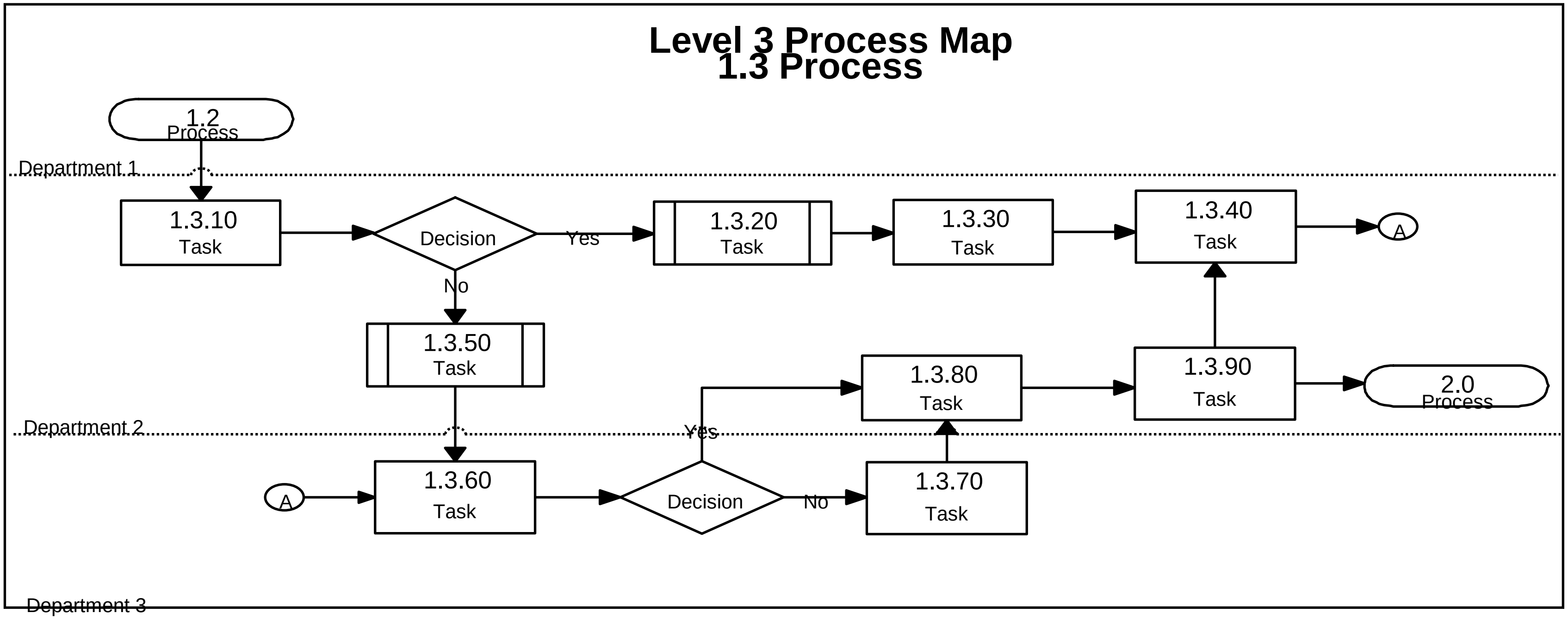

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  - Level 5 scripts may or may not be necessary for ERP system implementations

Visio Training Objectives

- Provide team members with an overview of Visio 2003's key functions.
- Educate team members on process mapping guidelines and tips.

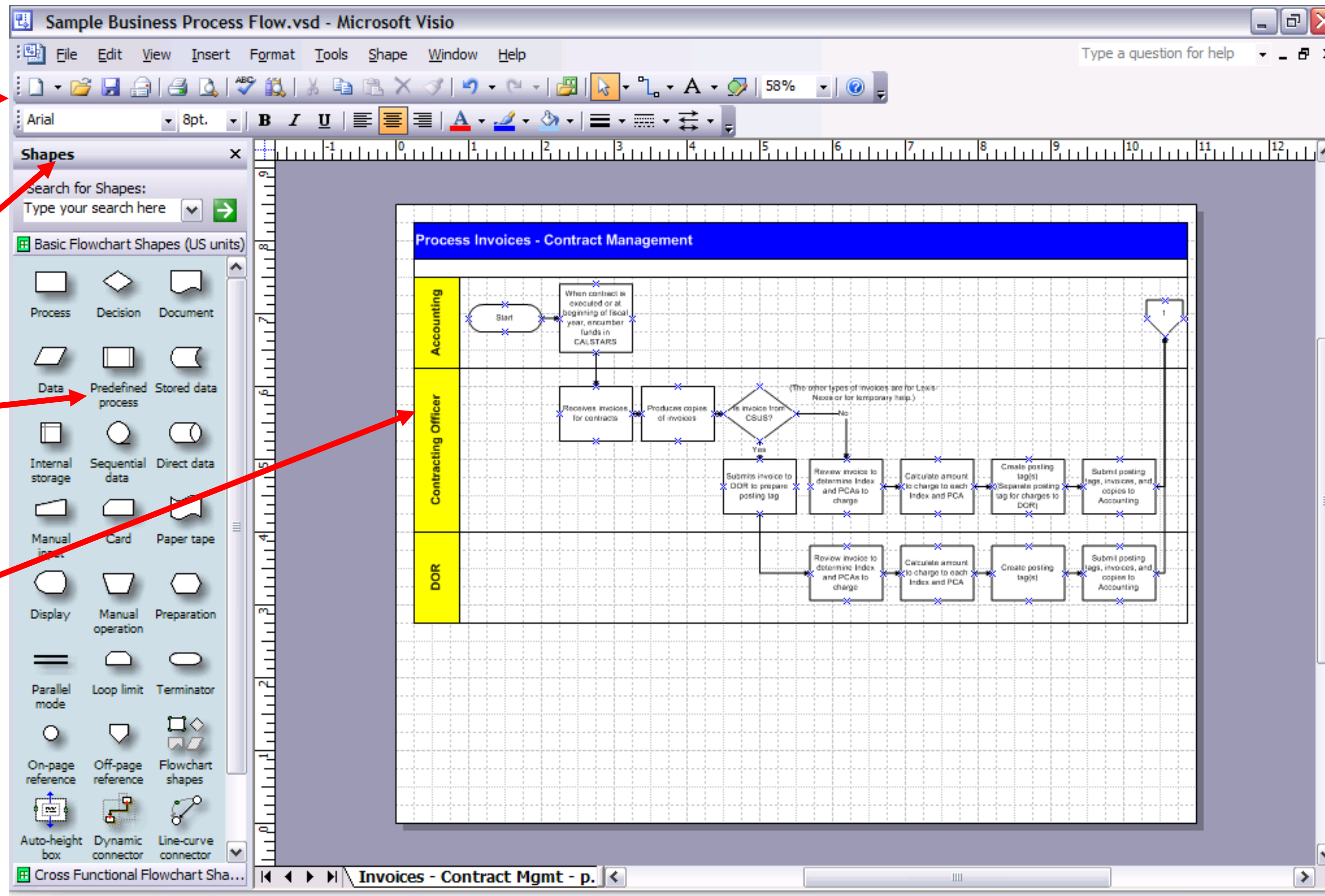
Visio 2003 Screen Layout

Toolbars

Stencil window

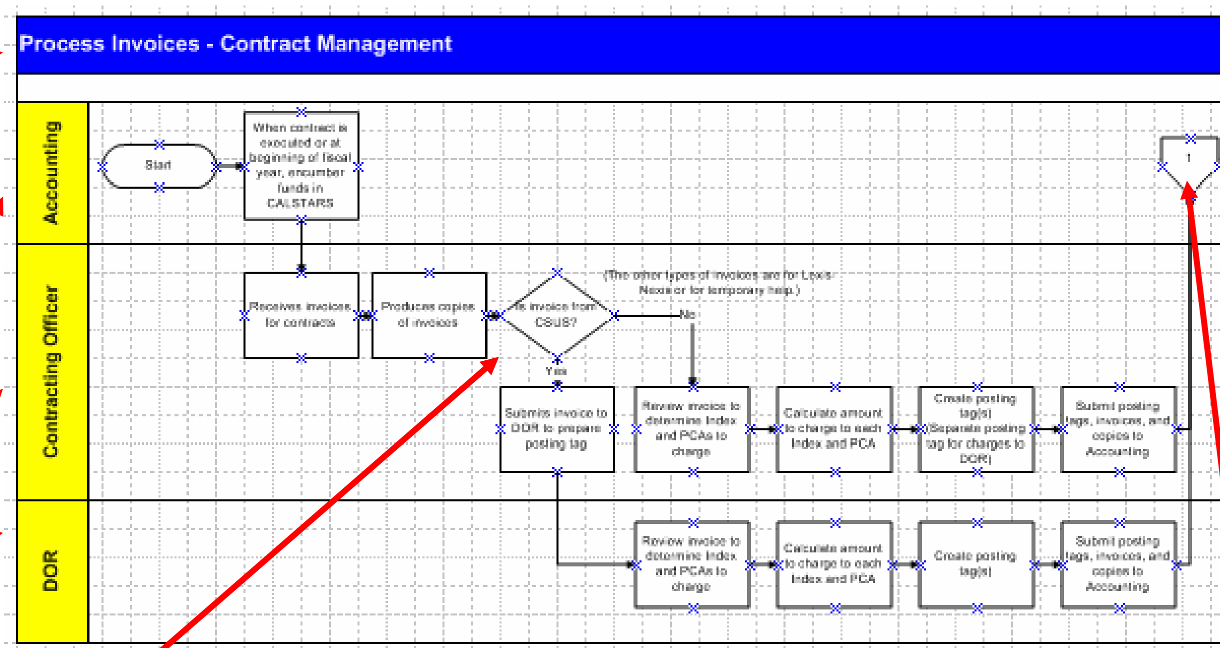
Shapes

Drawing window
(can contain
multiple pages)



Sample Business Process Flow

Process Title



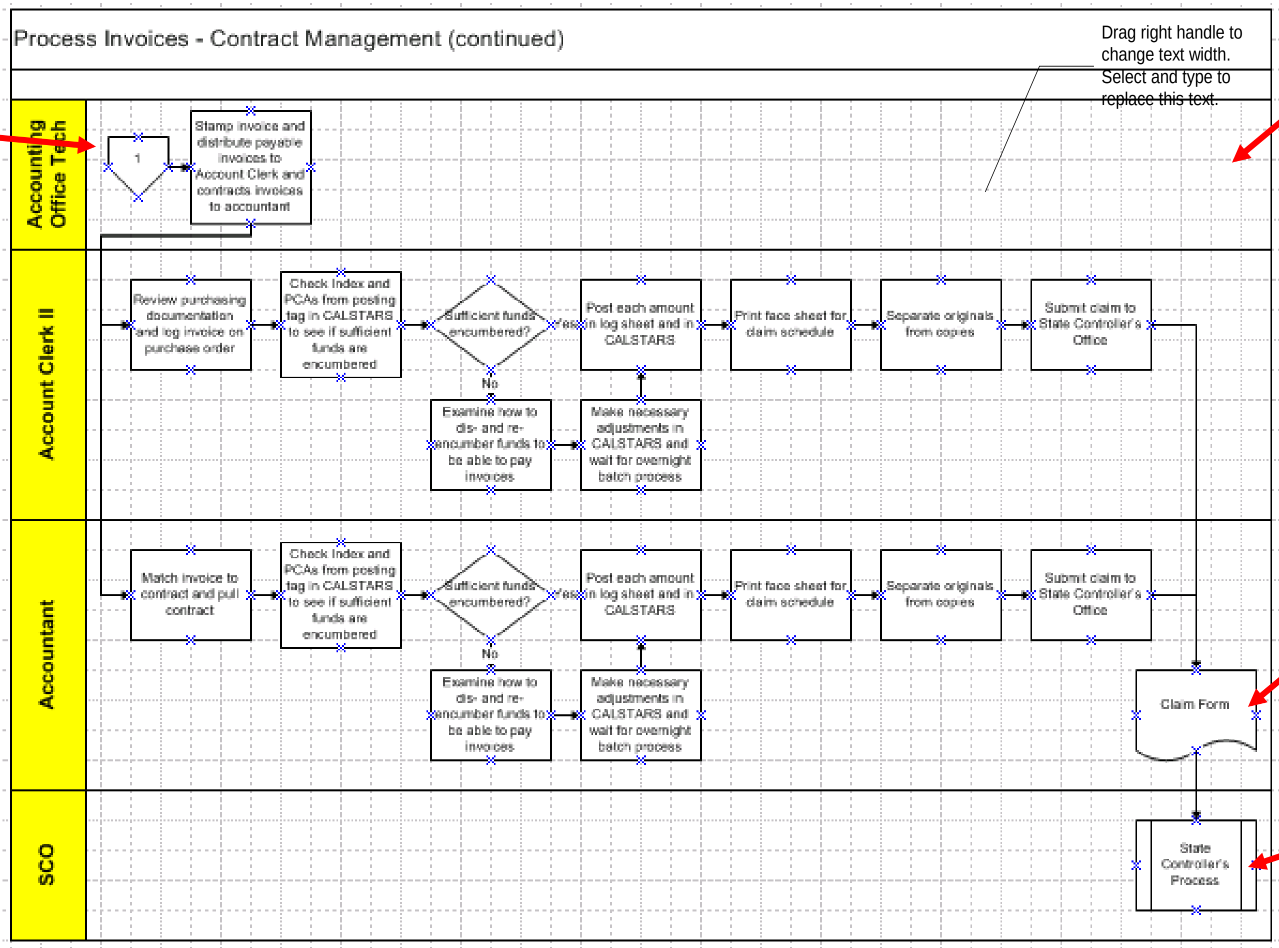
Swimlanes
(indicate actors)

Decision Point

Off-page connector

Sample Business Process Flow (continued)

Off-page connector

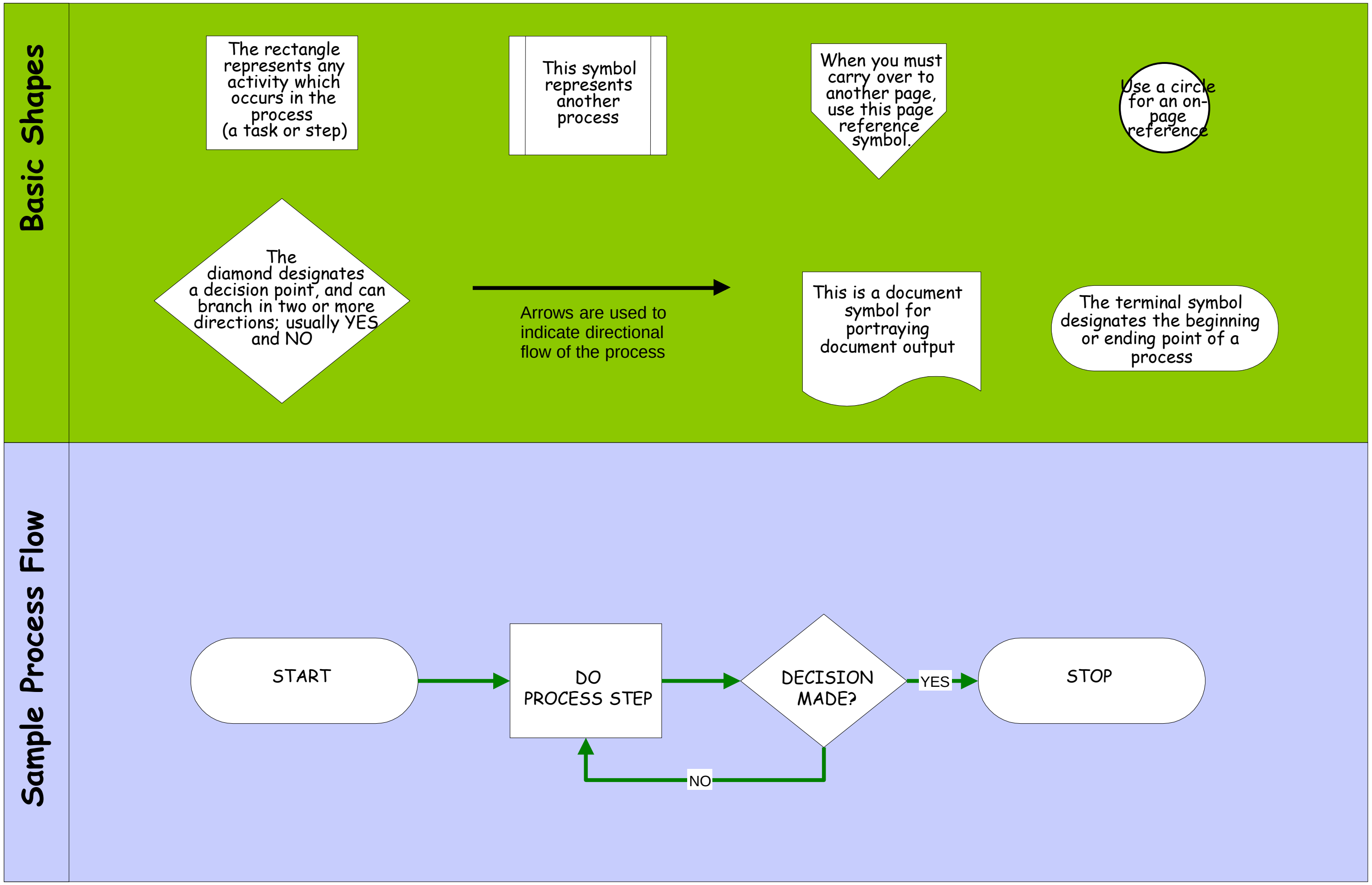


Text callout

Document

Other Process

Business Process Flow Shapes

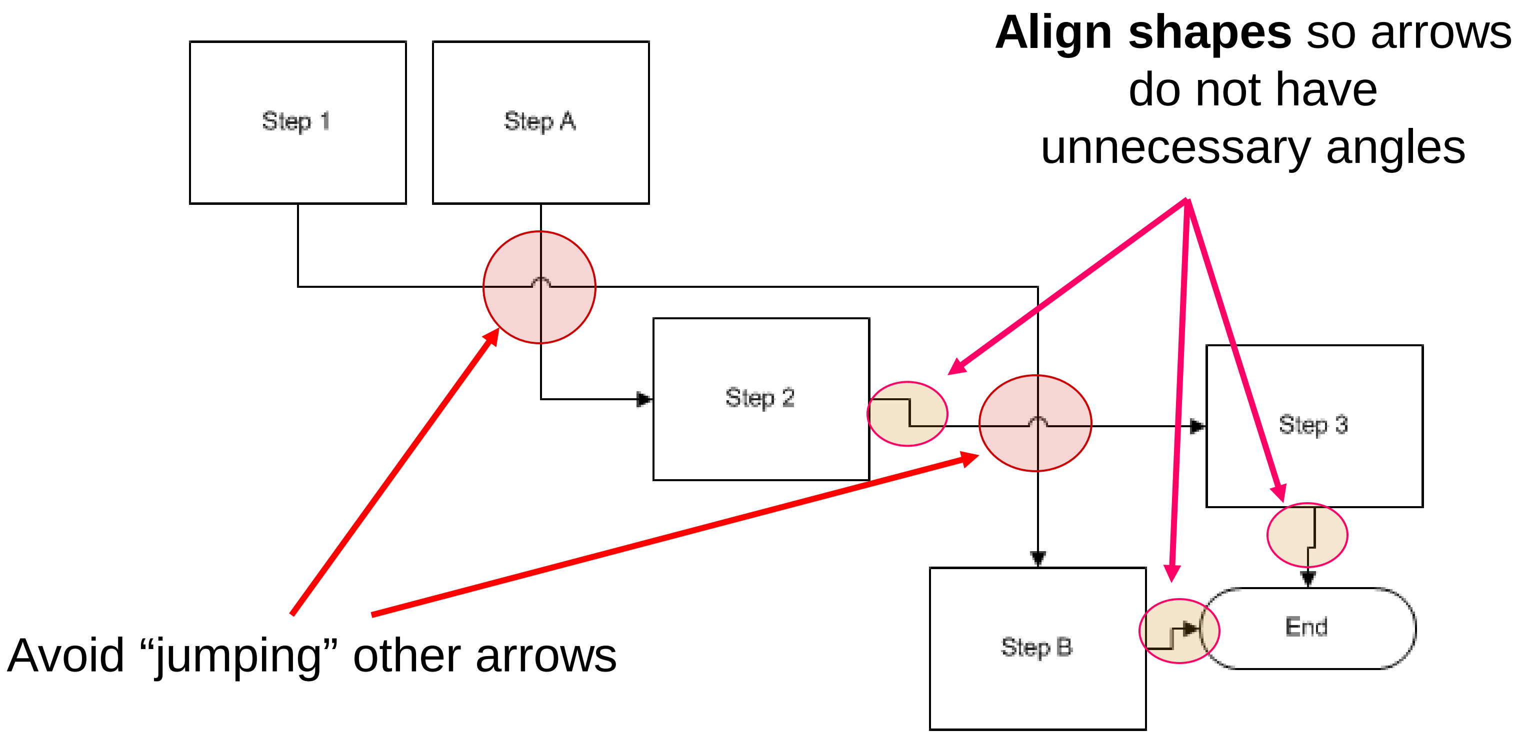


Process Mapping Guidelines

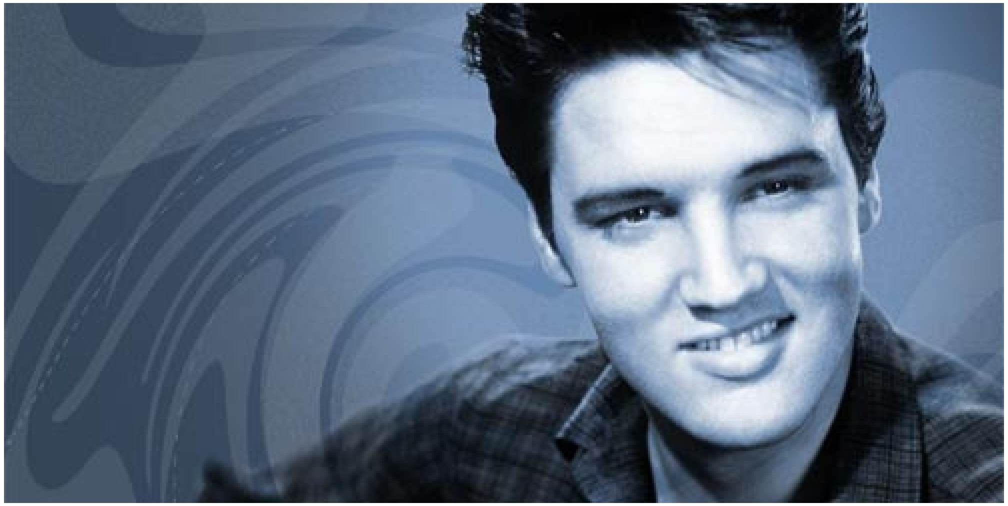
- X-Axis indicates time
- Y-Axis indicates responsibility
- Create flows left to right; do not go right to left to save space
- Begin all steps with a verb such that “Swimlane Actor”…”Performs particular action” makes a complete sentence:
  (Example: “Warehouse Staff”…”Receives shipment”.)
- All decision points should be phrased as a question. Answers are usually “Yes” or “No”, but could be something like “< $50K” or “≥ $50K”.

Process Mapping Guidelines (continued)

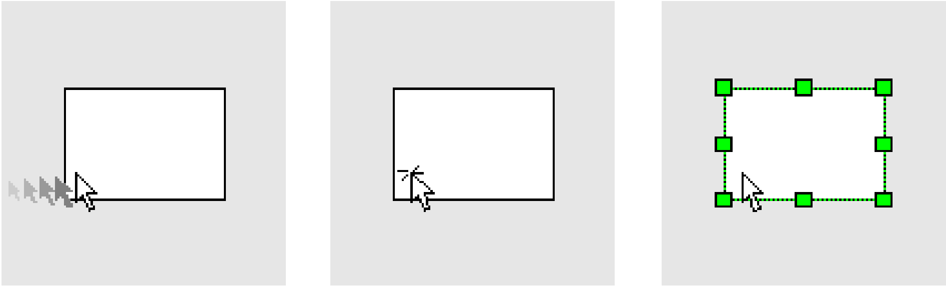
- Keep maps simple and easy to read:



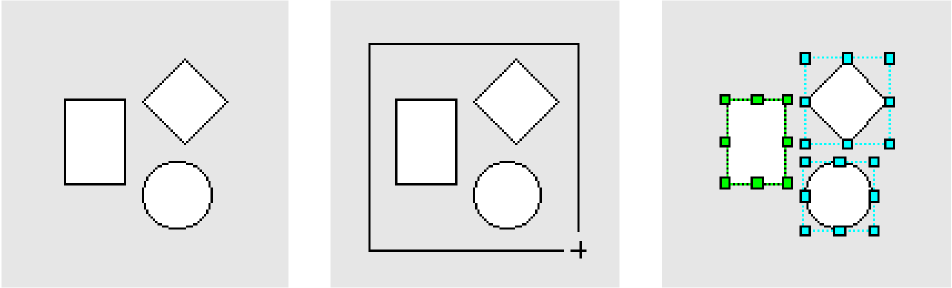
Demo



Select a shape

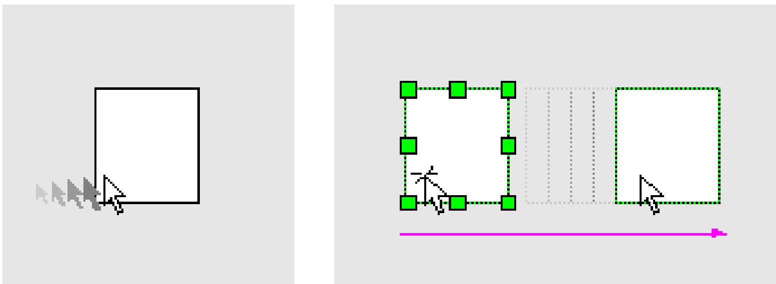


To select a single shape, click when the pointer changes from a black arrow to a white arrow.

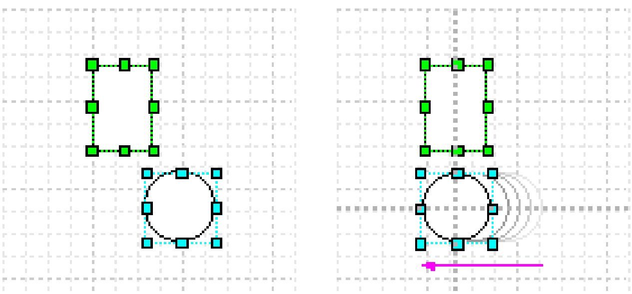


To select multiple shapes, drag a selection net around them. You can quickly select all the shapes on a page by choosing Edit > Select All. The first shape on the page has green selection handles.

Move a shape



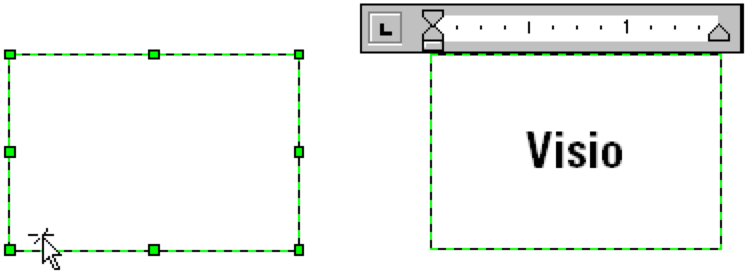
To move a shape, when the cursor turns white, hold down the mouse button and drag.



To move a shape and align it with another shape, let the dynamic grid lines guide you. To turn on the dynamic grid, choose Tools > Snap & Glue. On the General tab, check Dynamic Grid, and then click OK.

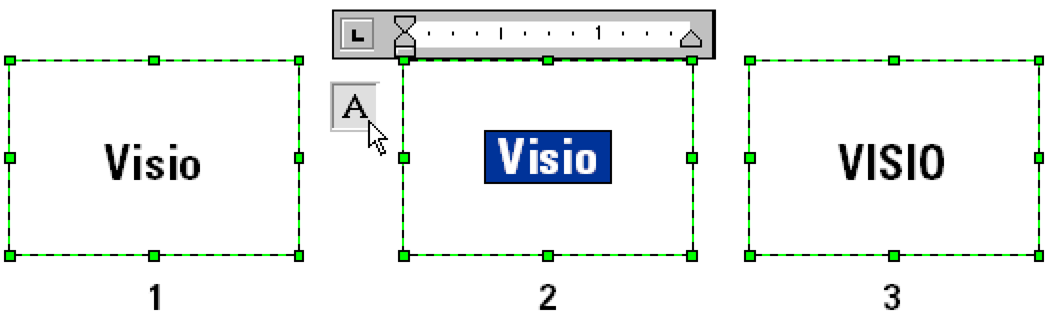
Add or change shape text

Add new text to a shape

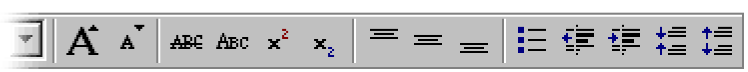


To add text to a shape, select the shape, and then type.

Change existing shape text



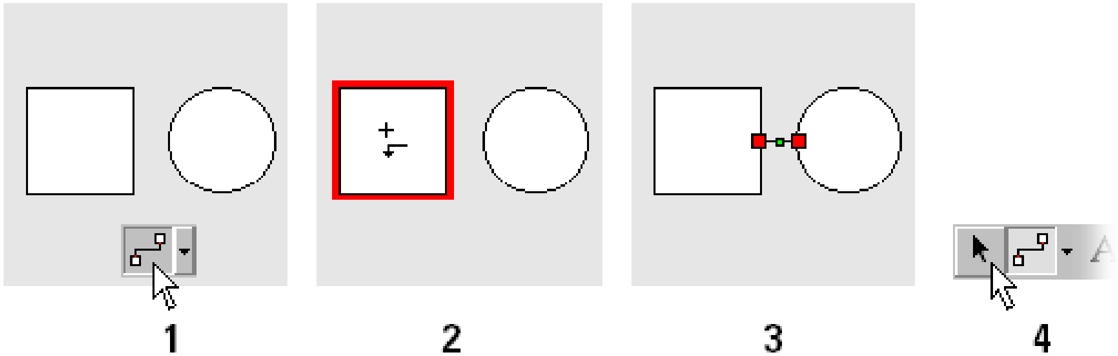
To change existing shape text: (**1**) Select the shape. (**2**) Choose the text tool. (**3**) Type the new text.



To change the way shape text looks, select the shape, and then click buttons on the Format toolbar.

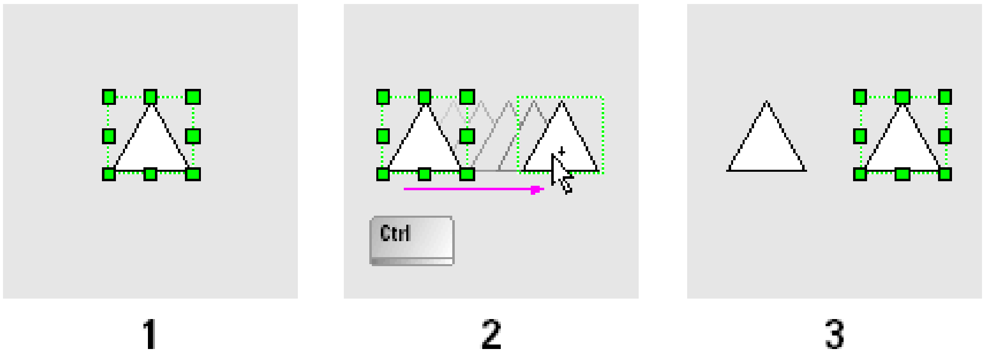
Connect shapes

Connect two shapes with a line



To connect two two-dimensional (2-D) shapes with a line: (**1**) Click the connector tool on the Standard toolbar. (**2**) Place the pointer inside the first shape until an outline appears around the shape. (**3**) Drag the pointer inside the second shape until the outline appears, and then release the mouse button to connect the shapes. **(4)** Click the pointer tool on the Standard toolbar.

Duplicate a shape



To duplicate a shape: (**1**) Select the shape. (**2**) Hold down the Ctrl key. (**3**) Drag to place the duplicate shape where you want it.

What happens when you do not have Visio?

- When all else fails, do not despair!
- Facilitate your meetings using templates (pgs 120 & 121)
- You only need two templates
- These can be pasted on a conference room wall

Start by using the SIPOC Template

Process Name: ______________________ **Purpose:** ______________________

Suppliers
1.
2.
3.

Systems & Info

Major Process Steps

Resources

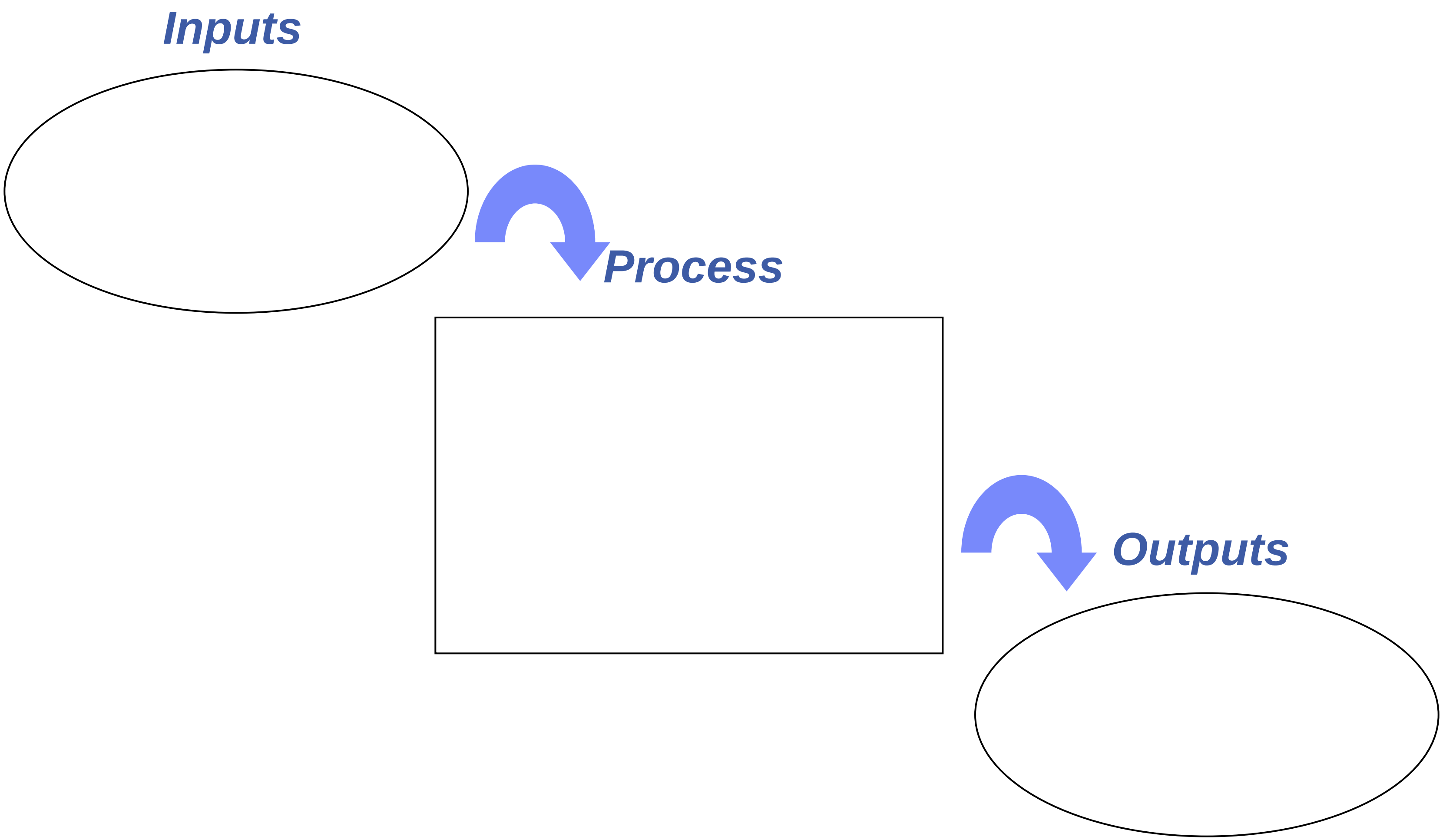
Customers
1.
2.
3.

Inputs
1.
2.
3.

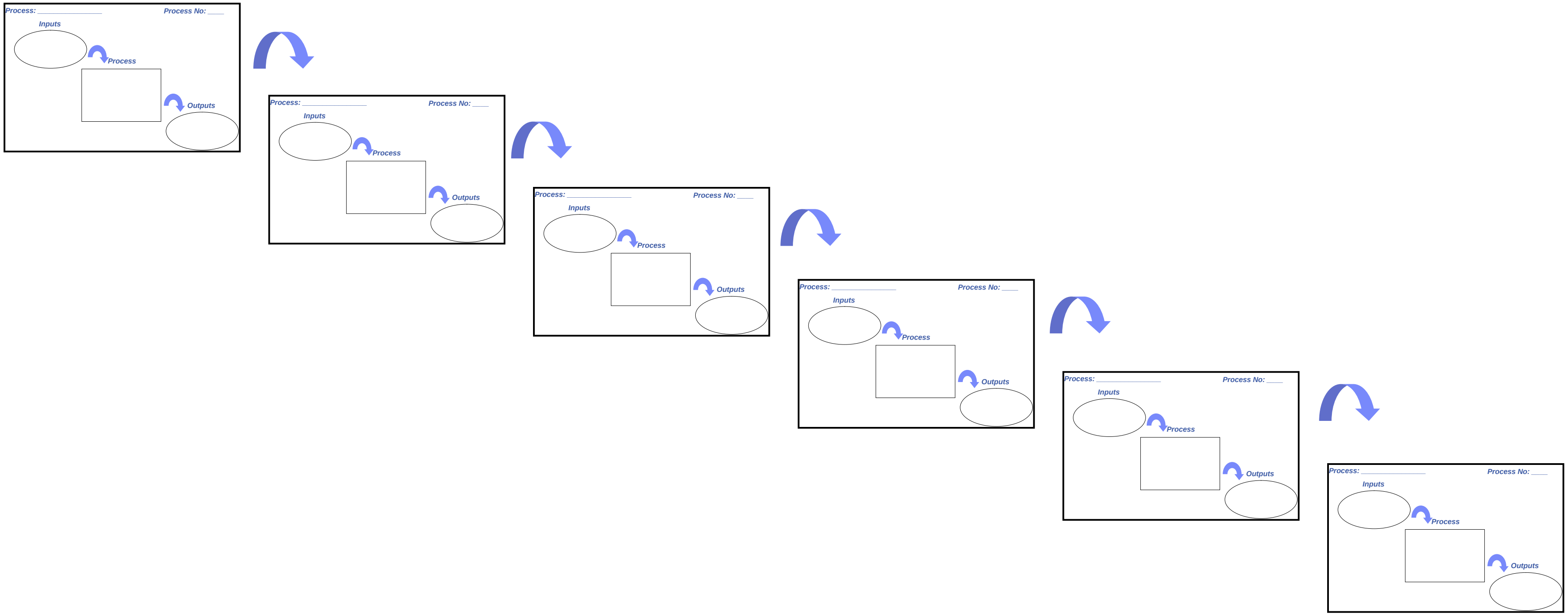
Outputs
1.
2.
3.

Process Decomposition Template

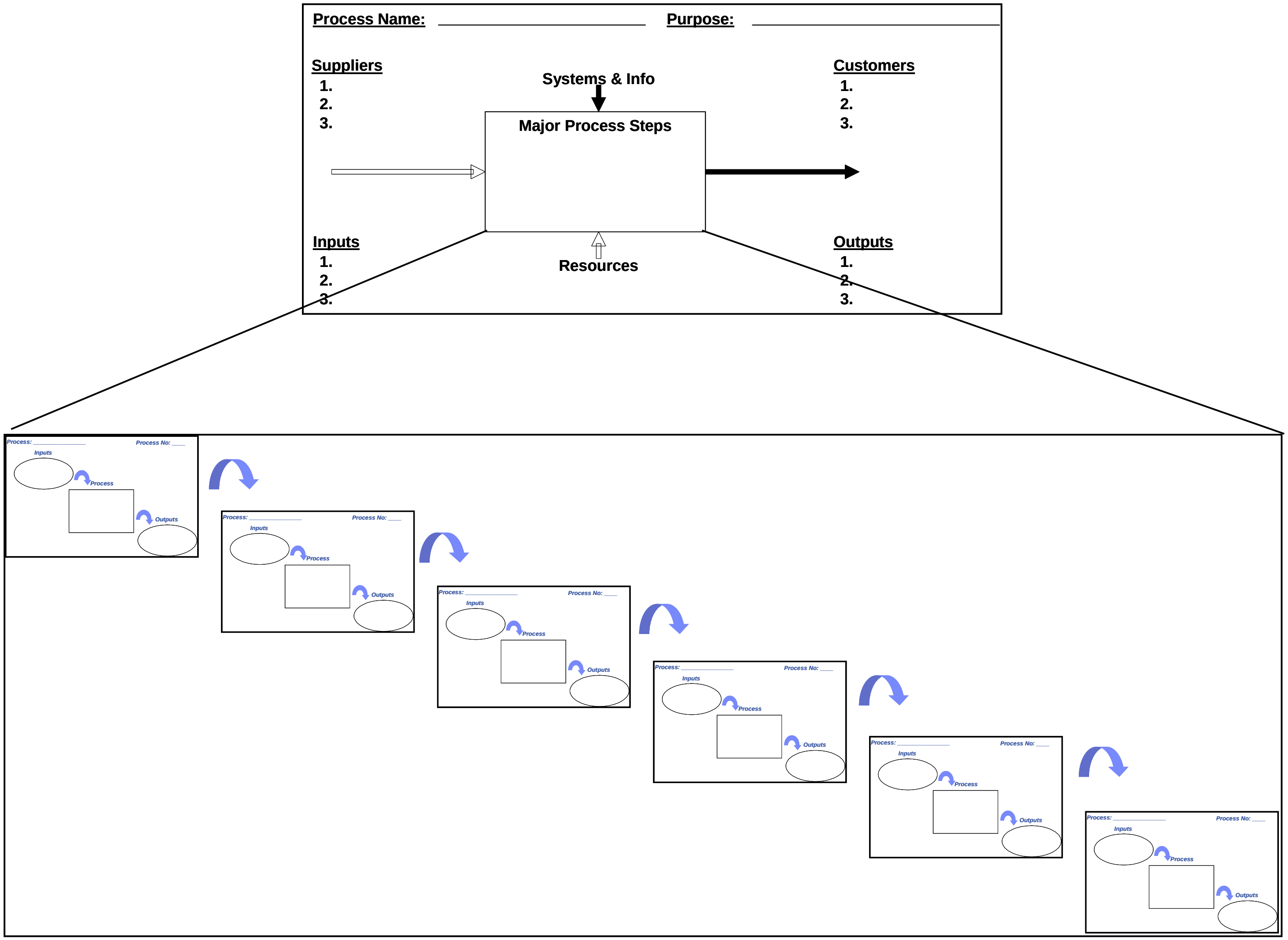
Process: ________________   ***Process No: ____***



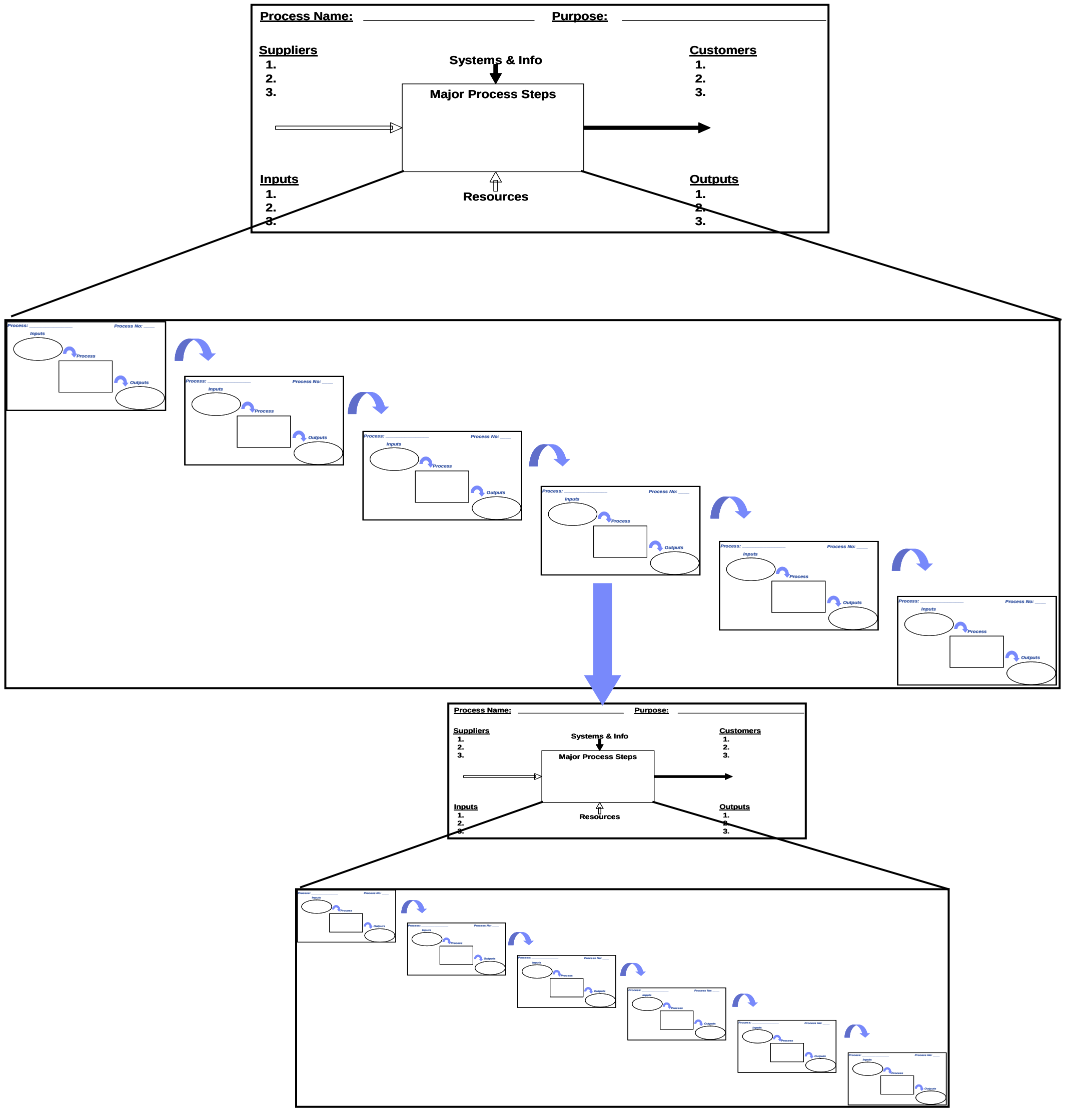
Using the template to decompose a process



SIPOC & Decomposition Template



Continue the decomposition process until you reach Level 3



The final decomposition will need to be documented in Visio. Check with your Sponsor to determine who will document the process.

Questions?