

Business Acumen: Workflow Design

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“ How beautiful the strategy, you should occasionally look at the results. ”

– Winston Churchill



Why is work flow design critical to product development?

- Productivity is key to successful product sales.
- Products succeed or fail based on ability to “generate interest” and distinguish themselves from the competition.
- Profitability is hampered by “waste” (extra steps) in the process.
- You won’t be able to remove “waste” unless you know the process fully.



8 step process to product development*

- Idea generation. Brainstorming new ideas from users of the product.
- Idea screening. Is this actually a good idea?
- Concept testing. Conduct focus groups – ask consumers – do they want it?
- Business analysis. Cost, marketing, demand, competitors, sales forecast.
- Product development. Testing out the product.
- Test marketing. Always small scale - failure or success analysis (in government we call them pilots. 😊)
- Commercialization. Large scale implementation.
- Review of market performance. Evaluation ROI.

*<http://kalyan-city.blogspot.com/2012/02/stages-process-steps-of-new-product.html>



Today's focus is on this STEP in the product development process.

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Knowledge, Skills and Abilities for good work flow design*

- Anyone can do a Business Process Modeling effort BUT they must have organized thinking and approaches
 - Ability to generate a process model or logic model (state machine)
 - Effective community of details concepts – translating the abstract into details
 - The ability to ask critical questions in a non threatening way to identify risks
 - The ability to challenge the stakeholders when they get into the politics of redesigning a given process that is controversial – that includes knowing which battles to fight.

*Source: <https://www.batimes.com/angela-wick/the-top-10-business-analysis-skills-for-2012.html>



Minnesota's LEAN efforts and history

- The ADRC started using LEAN approaches to design aging services in 2010
- Return to Community
- Many stakeholders
- Required complicated tracking and clear requirements
- Had to implement flawlessly
- Now used with all ADRC project management or program design or redesign efforts.



How process modeling supports LEAN (Kaizen)

- Identify a process improvement need
- Get everyone to the table that understands it or is impacted
- Don't use Visio (except as some person to the side copying everything into the computer) - create the process using sheets on the wall and markers
- Define and assign responsibilities for various implementation points (training, requirements gathering and marketing)

Source: <https://leancor.com/blog/how-to-create-a-swim-lane-diagram/>

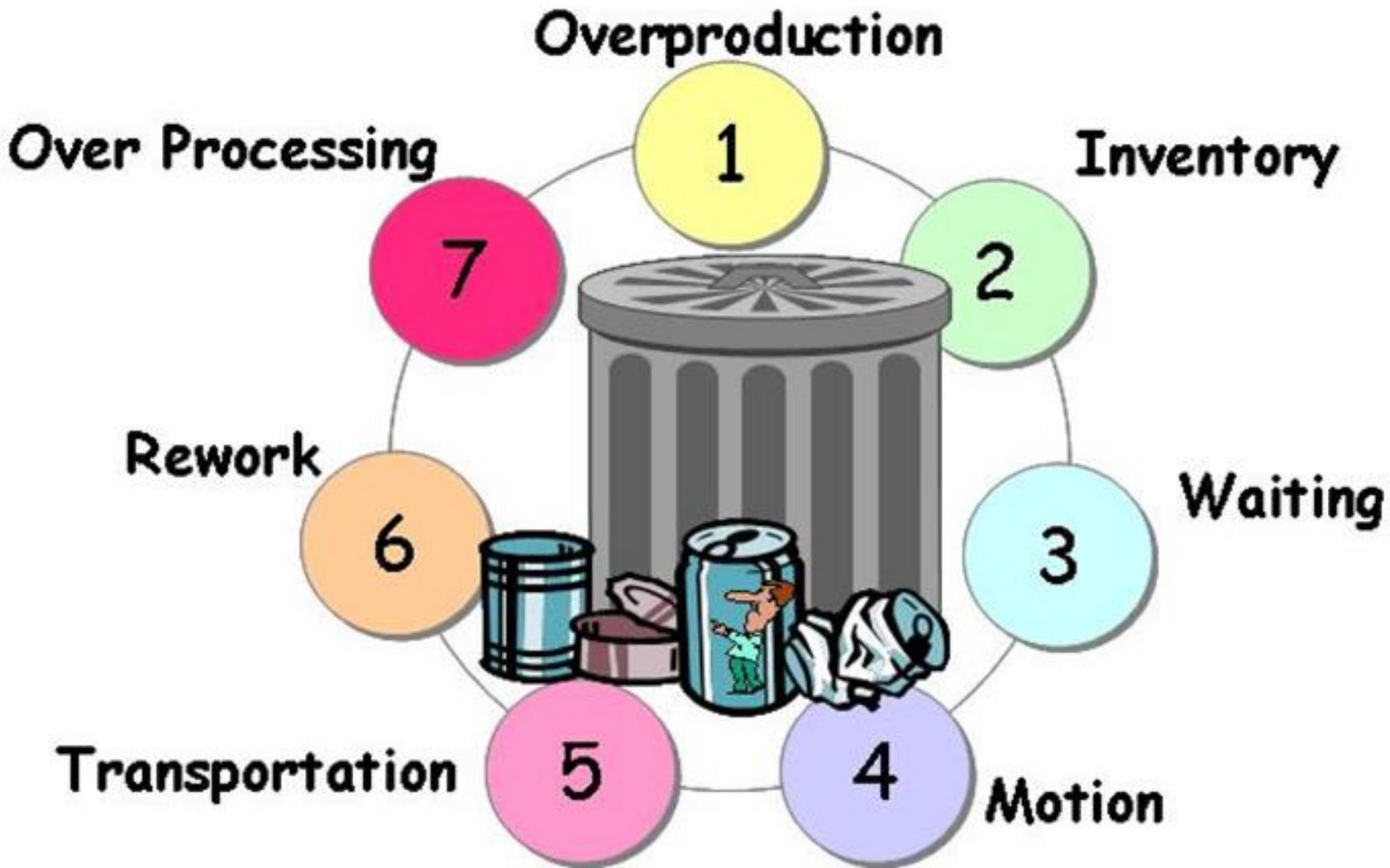


Along the way – be careful of the seven wastes...

- The Seven Wastes
- Derived from the Japanese word for MUDA meaning “futility, uselessness or wastefulness”
- We like to use a strengths based approach by describing something as “adding value”
- If something ADDS VALUE – then make sure its added in the process – if it doesn’t ADD VALUE – then work to fully eliminate it (or partially if you have external requirements.)
- The Japanese describe identifying waste as “learning to see”.



The 7 Wastes



Work flow design makes the process entirely transparent

Trust is increased in the process as a result – especially for some stakeholders or when a process is political in nature (such as many government funded services)

Corporations are starting to use it to make their processes transparent to advocacy groups

It has great potential to not only allow an interested party to “consult” but to be a part of consensus



Other Great Reasons To Do Clear Work Flow Design

- For the purposes of business acumen – you will appear far more professional to the purchaser – More planful in your approach and more concerned about them as an end customer
- Error reduction is significant
- Staff have far more predictability
- Testing, acceptance and error are more successful
- The product is higher quality as a result which **REDUCES YOUR RISK.**

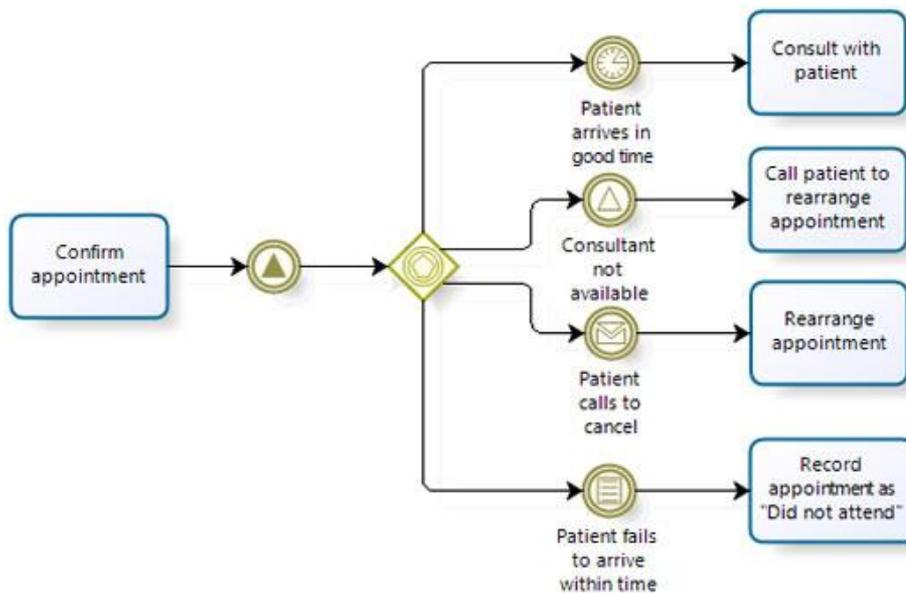


What is BPM 2.0

- Wikipedia says:
 - “Business process modeling... (BPM) is typically performed by business analysts, who provide expertise in the modeling discipline; by subject matter experts, who have specialized knowledge of the processes being modeled; or more commonly by a team comprising both. Alternatively, the process model can be derived directly from events' logs using process mining tools.
 - The business objective is used often to increase process speed or reduce cycle time; to increase quality; or to reduce costs, such as labor, materials, scrap, or capital costs. In practice, a management decision to invest in business process modeling is often motivated by the need to document requirements for an information technology project.
 - It can lead to marketing, communications and training analysis, as well.



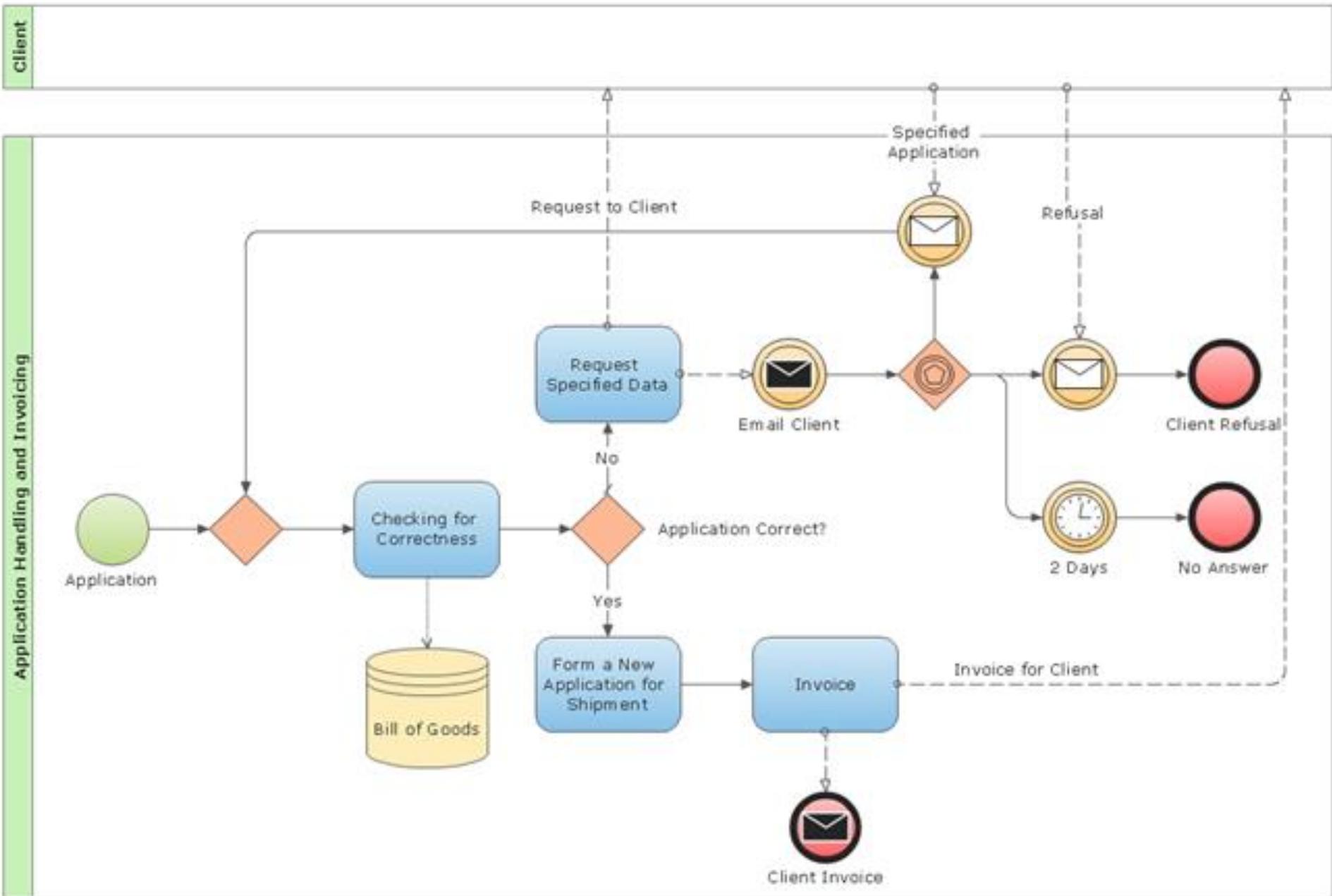
BPMN 2.0 The Symbols:



- 1) Events - start, end or an expectation in between;
- 2) Activity - represents a process or task and;
- 3) Gateways - symbolizes where paths come together or part – (we tend to use it to express a decision point since what we are designing involves people not machines)



Application Handling and Invoicing Process



BPMN 2.0 Poster(s): the WHOLE picture...

BPMN 2.0 - Business Process Model and Notation <http://bpmb.de/poster>

The poster is divided into several sections:

- Activities:** Task, Sub-process, Call Activity, Activity Markers, Task Types, and Flow Types (Exclusive, Parallel, Inclusive).
- Conversations:** Conversation Starters, Conversation Diagram, and Collaboration Diagram.
- Choreographies:** Choreography Starters, Choreography Diagram, and Collaboration Diagram.
- Events:** Start, Intermediate, and End events, categorized by type (Error, Exception, Escalation, etc.) and trigger (Message, Timer, Error, etc.).
- Gateways:** Exclusive, Parallel, Inclusive, Event-based, and Event-based Exclusive.
- Collaboration Diagram:** Shows multiple participants and their interactions.
- Data:** Data Objects, Data Stores, and Data Inputs/Outputs.
- Swimlanes:** Pools and Lanes.

Logos at the bottom include BPM Berlin, comundo, inubit, and SIGNAVO.



KISS applies here!



Using the documentation regularly and effectively will lead to

- Improved business requirements
- Relevant trainings
- More effective marketing and communication strategies



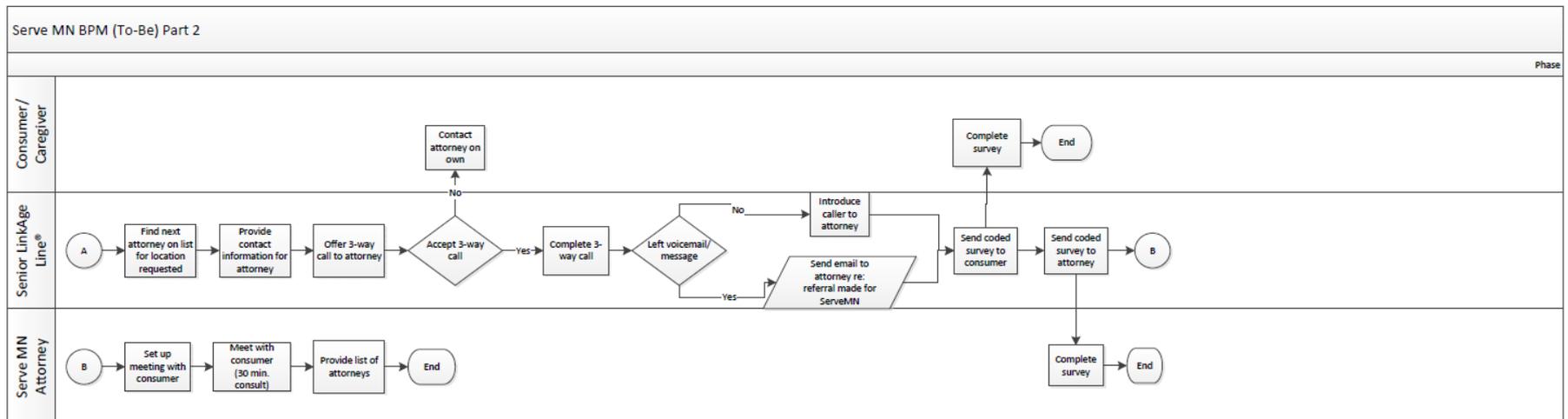
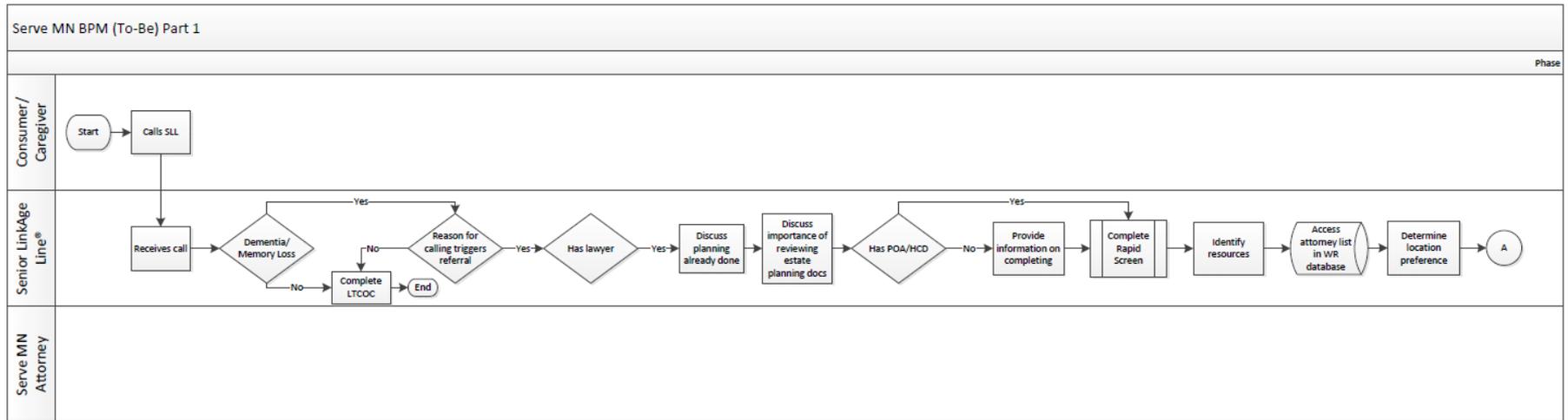


Real Examples from Minnesota...
Land of 10,000 Lakes and Services!



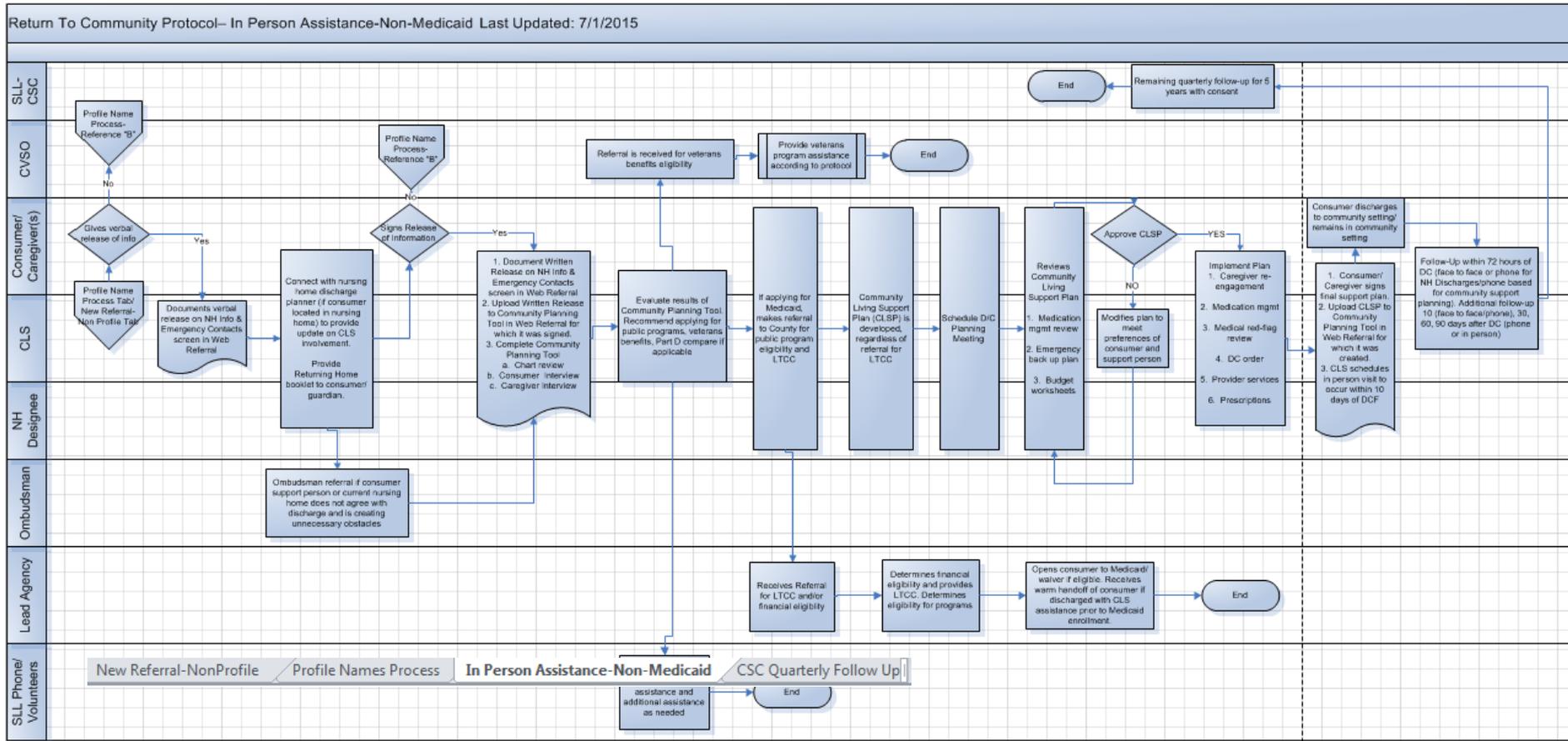
Example 1: Business Process Model

Can be simple...



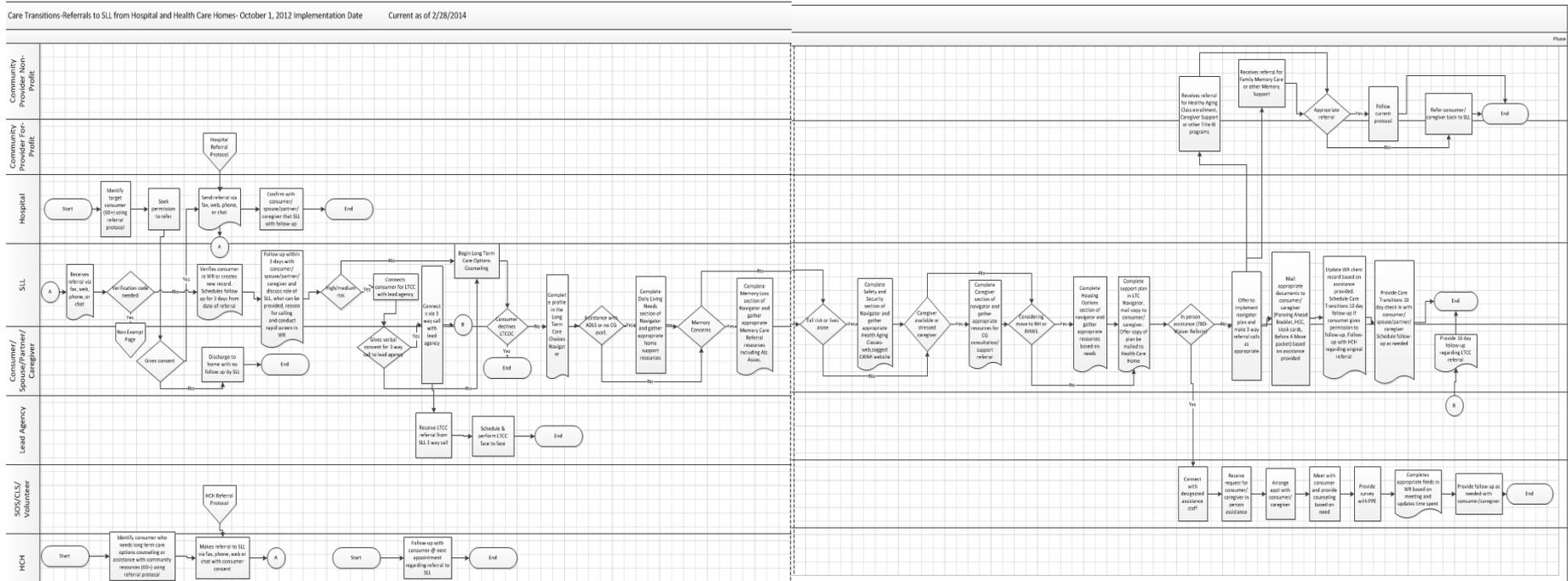
Example 3: Business Process Model

May have to break a process into sections...Process 3 of 4



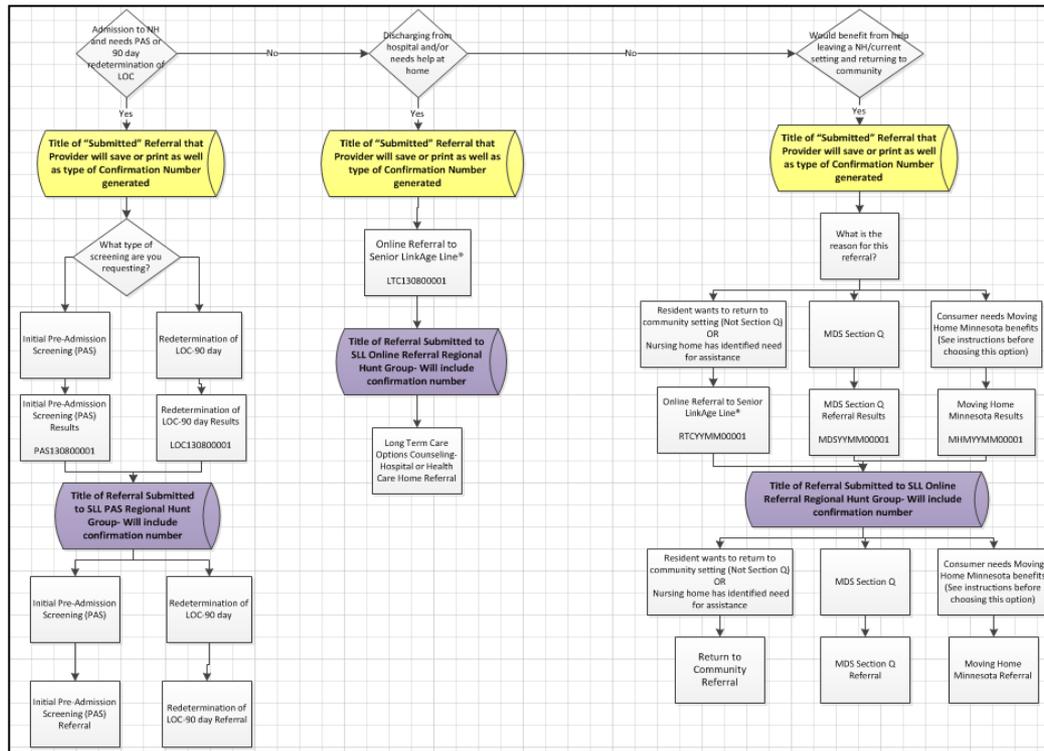
Example 4: Business Process Model

May be a main process that other BPMs point to...



Example 5: Activity Diagram

Activity diagrams document a single process flow



This example documents how a tool will triage an online referral into a specific mailbox, as well as how the database will name the referral.

When BPM doesn't work well

- Large group consensus (more than 50 – use a world café perhaps)
- When the “ideas” don't need to be specific and are more policy oriented e.g. Develop an online tool versus the tool needs the following three steps.



Identify the stakeholders that should be engaged in the design of a service

- Who are considered stakeholders in given process?
 - Users/consumers/clients
 - Providers
 - staff delivering a product
 - leadership and decision makers
 - Associations/lobbyists/advocates
 - Legislators/governor's office



Roles and Materials needed for an event

- Paper for the wall
- Facilitator(s) for processing and to watch the audience
- Scribe/recorder for the modeling (2?)
- Visio created
- Notetaker (separate that documents discussion in Word)



Putting the models into Visio

- Documenting discussions and ensuring accuracy
- Sending the Visio out for review (or a meeting if the stakeholders tend to be difficult)



How to use business process modeling most effectively to reach consensus

- The BPM process SHOULD be used to create consensus at all points
- Push the group to fully delineate out all processes
- Use good facilitation techniques – ask a lot of questions
- Don't let one person or group dominate – make sure everyone has input by using round robin if necessary
- Be firm in the need to dive into a particular step in the process – especially if its too high level because the devil is definitely in the details e.g. refer to helping agency vs. facility complaint? Yes - refer to ombudsman. No – vulnerable adult complaint? No – apply for Medicaid? Yes – refer to county.
- Use a process to gain input on the draft model



Next steps after the event

- Send it out by email
- If the group/process or topic is contentious – you definitely should have a follow up meeting (invest the time) and walk through the final model
- If you need to amend the model – go back and revisit and do a new model – don't be cavalier – take the time



What have we learned along the way?

- Planners are very good at this stuff and love it
- BUT – it takes DISCIPLINE to successfully do this work as well as CONSISTENCY and CONSTANCY
- People who want quick outcomes get impatient and might get frustrated early on but later WILL BE SOLD
 - They tend to be outcomes oriented and will be convinced when they see better results.
- People oriented individuals like the consensus but may need time to be convinced or may question if the right people are in the room – so be thoughtful about who is present.



Getting ALL Input Along the Way

- Groups can't be toooo large, so
- Not everyone at an organization can attend always,
- Don't be exclusive however,
- You may need to tell people that they have to go back and get input on behalf of their agency
- You may need to go and meet at the agency or location to get all other inputs.



I LOVE a good ROAD SHOW!



What's a road show?

- You may need to bring the model and present it to key stakeholders who couldn't come to the meeting due to time or distance or strategy (we call them road shows)
- You won't get full consensus but you won't regret it –as people will have complete buy in and ownership and implementation will go pretty flawlessly.



Implementation Realities

- Implement business process modeling to design work flows in the agency's operations
- Present the BPM to project sponsors or senior leadership within the agency for final approval of the process
- This provides key tasks and ideas to consider when making changes or developing work flows
- It's okay to add to the parking lot once the BPM is complete
- BUT Don't Forget about the Parking Lot
 - You may need to do a Phase II BPM Event



Implementation Considerations

- Determine if changes to technology or development of materials is needed
 - Example, if a new process requires regular reports, what changes are needed to technology or reporting systems ensure those reports can be generated.
 - Example, if a new process requires marketing, what marketing materials are needed



More Implementation Considerations

- What other stakeholders or players need to be informed of changes? Who did you miss because you probably did miss someone – your stakeholders will tell you.
- Are trainings or a communications strategy needed? And who gets trained beyond staff and how?
- Create a work plan to document all tasks to implement work flow and timeline
 - Work backwards from due date!
 - Assign people to tasks with clear due dates and deliverables
 - Develop a protocol based on the BPM per agency's protocols
 - This could include any of SOPs or all three!



Questions?

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