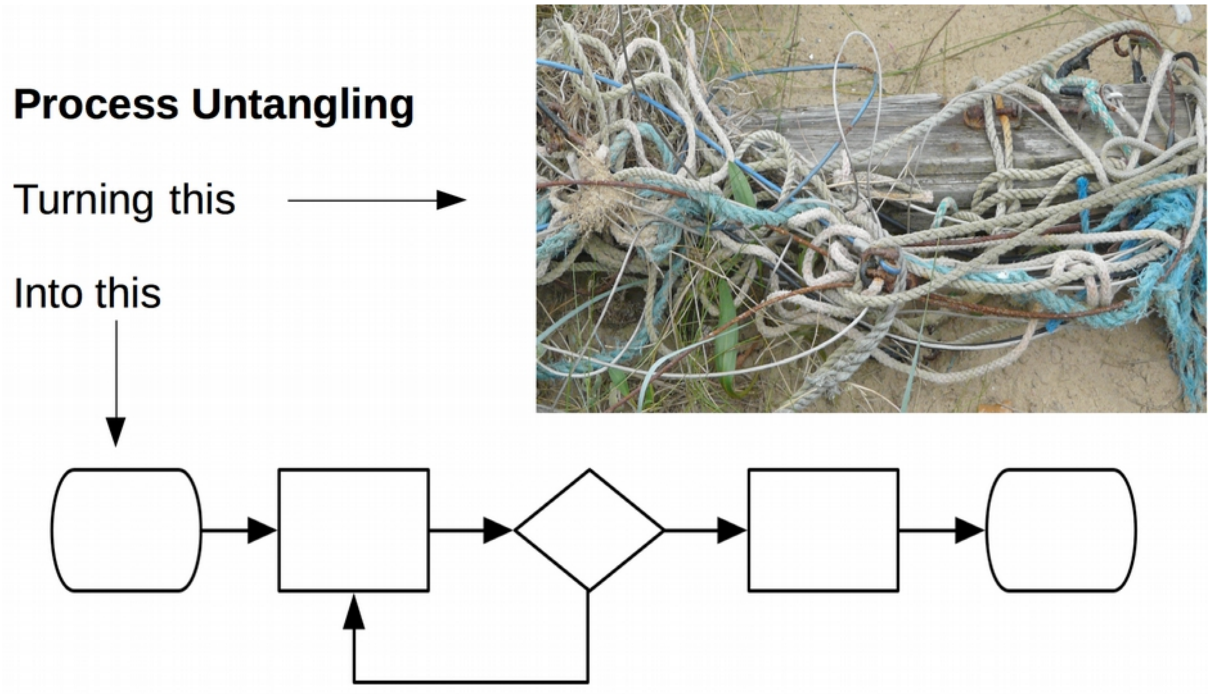


Introduction

When faced with a tangle of processes, it's easy to feel lost. The connections and interactions in a tangle are unclear: what goes in, what goes out, from where and to who cannot be easily seen.

The key steps to untangle processes are:

1. Locate the processes and activities within the tangle.
2. Classify them.
3. Catalogue them.
4. Evaluate: What don't you need, what needs to work better, what's duplicated, what needs to be created.
5. Correction:
6. Connect: Review the connections in and out of them to ensure that they are connected together as part of an effective organisational system.

Locating the processes

Brainstorming is a quick way to find the process issues within a tangle. WOMBAT (Waste Of Money, Brains And Time) is the approach that I use for running these sessions. (I describe this approach in The Mighty WOMBAT: A Simple Approach to Finding Muda at http://tinyurl.com/juwhkqr in Tand in the short video at http://tinyurl.com/h3snbur .

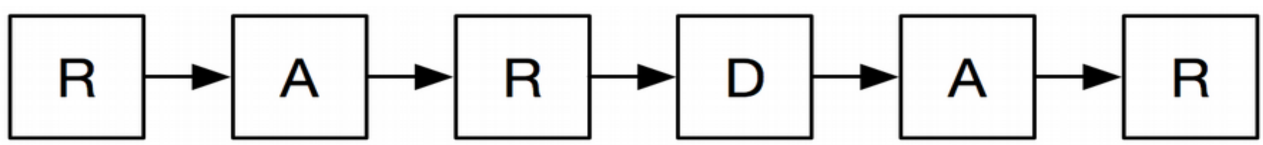
The example below is an extract of issues raised from a series of WOMBAT sessions in an organisation that provides emergency maintenance. For each issue raised, the associated process and it's status can be determined.

Issue raised	Associated process	Process status
No consistent way of receiving orders from clients	Client order process	Inconsistent
Multiple sources of orders	Client order process	Inconsistent
Management of variation orders is inconsistent	Client order process	Inconsistent
Raising subcontractor orders (not consistent)	Sub contractor order process	Inconsistent
Incorrect information from online database	Database maintenance and cleansing	Inadequate
Poor project management system	Project management system operation, availability (licensing and mobile access) and training	Inconsistent
Progress of work being done is not made visible to operators and supervisors.	KPI measurement and visual reporting	Missing
Too many people inputting the same information onto systems	System management and governance	Inadequate

Table 1: Matching process to issue

Classifying and cataloguing processes

My RARDAR model is one approach that works well for simple process categorisation.

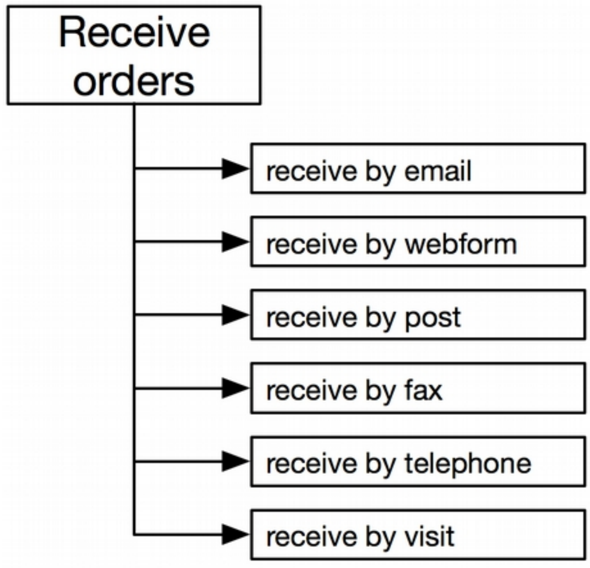


RARDAR stands for Receive, Assess, Route, Do, Approve, Release.

Function	Activity
Receive	Receive a trigger, for example a customer order.
Assess	Check that the order is complete and can be processed.
Route	Send to the person or persons that will perform the task.
Do	Complete the task or tasks defined in the order.
Approve	Check and approve, for example regulatory testing.
Release	Release to customer. Invoice customer.

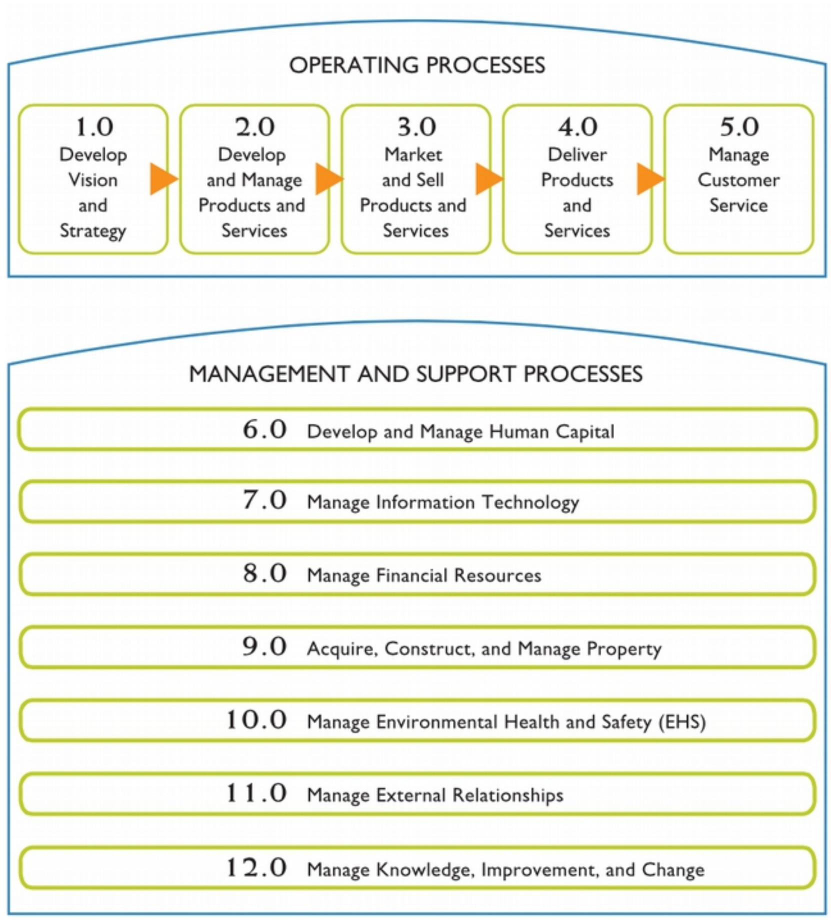
Table 2: RARDAR structure

Each step can be decomposed to show the processes within them. The example below is for the first stage of RARDAR, Receive. This shows the multiple routes into the *Receive Orders* function



Using the APQC Process Classification Framework

Illustration 1: The APQC Process Classification Framework



A business model template is a way of classifying processes and their attributes by providing consistent descriptions for the categories, processes and activities that form the business process landscape. The APQC PCF is an excellent foundation for such a template and provides a generic checklist of the typical processes and activities within an organisation.

It also provides the basis for a Common Business Language (CBL). Without the common understanding provided by a CBL, duplication of the same or similar processes and activities under different names is inevitable.

If we look at Category 3.0, Market and Sell Products and Services, the activities of Table 1, Matching Process to Issue, can be cross referenced to align with an industry standard terminology. This will help to develop a consistent business language understood by partners, clients, suppliers and employees alike.

3.0 Market and Sell Products and Services breaks down into the following process groups:

3.1 Develop marketing, distribution, and channel strategy
3.2 Develop and manage sales strategy
3.3 Manage advertising, pricing, and promotional activities
3.4 Manage sales partners and alliances
3.5 Manage sales opportunity and sales pipeline
3.6 Sales order management

Table 1 shows that order management is an issue. The processes within process group 3.5 are as follows:

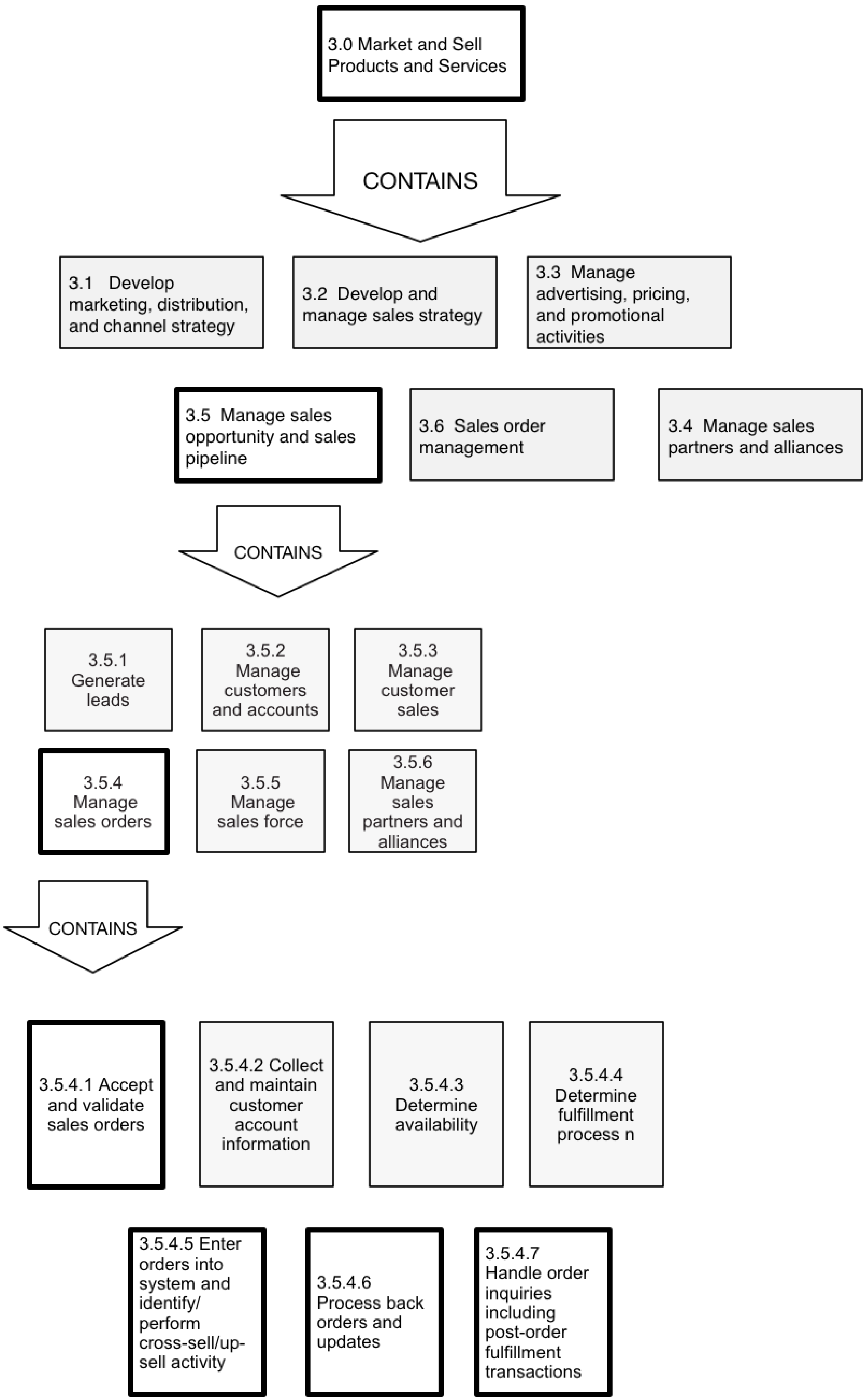
3.5.1 Generate leads
3.5.2 Manage customers and accounts
3.5.3 Manage customer sales
3.5.4 Manage sales orders
3.5.5 Manage sales force
3.5.6 Manage sales partners and alliances

The process 3.5.4, Manage sales orders, contains the activities below and we can determine which are in scope:

3.5.4.1 Accept and validate sales orders	In scope
3.5.4.2 Collect and maintain customer account information	Out of scope
3.5.4.3 Determine availability	Out of scope
3.5.4.4 Determine fulfillment process	Out of scope
3.5.4.5 Enter orders into system and identify/perform cross-sell/up-sell activity	In scope
3.5.4.6 Process back orders and updates	In scope
3.5.4.7 Handle order inquiries including post-order fulfillment transactions	In scope

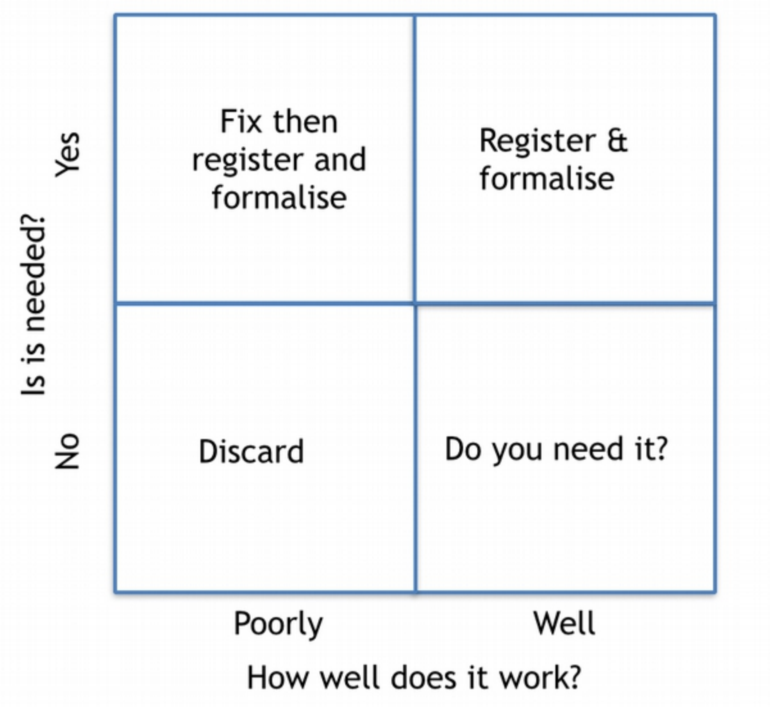
Table 3: APQC PCF processes in scope

We can then match these to the client order issues of Table 1. The activities tagged 'in scope' are ones that we need. The initial definitions and locations for the processes and activities are now shown within the overall business architecture defined by the PCF. The shaded blocks are out of scope while we concentrate on fixing the failing or missing processes that were identified from the WOMBAT sessions.


3.0 Market and Sell Products and Services
CONTAINS
3.1 Develop marketing, distribution, and channel strategy
3.2 Develop and manage sales strategy
3.3 Manage advertising, pricing, and promotional activities
3.5 Manage sales opportunity and sales pipeline
3.6 Sales order management
3.4 Manage sales partners and alliances
CONTAINS
3.5.1 Generate leads
3.5.2 Manage customers and accounts
3.5.3 Manage customer sales
3.5.4 Manage sales orders
3.5.5 Manage sales force
3.5.6 Manage sales partners and alliances
CONTAINS
3.5.4.1 Accept and validate sales orders
3.5.4.2 Collect and maintain customer account information
3.5.4.3 Determine availability
3.5.4.4 Determine fulfillment process n
3.5.4.5 Enter orders into system and identify/ perform cross-sell/up-sell activity
3.5.4.6 Process back orders and updates
3.5.4.7 Handle order inquiries including post-order fulfillment transactions

Correcting Processes

Unpicking a process tangle reveals what is in it, why it's there and if it is needed. Each identified process and activity will fit somewhere on the 2×2 matrix below. Processes approved for use within the business should then be formally registered and placed under change control.



Connecting the processes

The connections to a process can be determined by using a SIPOC table as in the example below:

Supplier	Input	Process	Output	Customer
Customer making an order	Sales order	Accept and validate order	Validated sales order	Person or persons who will do the work in the order

Table 4: Using SIPOC to identify process connections

Conclusion

As an organisation grows, it takes on more and possibly different work. That's when the processes and ways of working that were effective when it was smaller become no longer fit for purpose: they cannot cope with the volume and variety that is now presented to them. This can cause process bottlenecks, inconsistent quality of output and wasted resources. Unless processes are managed and tangles kept away, this growth may lead to eventual business failure.

Untangling business processes is not a trivial activity and this article is just an introduction to it. Please contact me at brian@businessprocessagility.com if you would like help in untangling your business process