



HIGH-YIELD METHODS

for customer-aligning business strategy, process & technology

Presenting CRM Process Support Requirements to IT

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Presenting process support requirements to IT (or to a software vendor) is half art, half science. The “art” part is documenting for IT how and what information has to function from person to person, from function to function and between outside stakeholders and employees. And that means mapping, but with a twist.

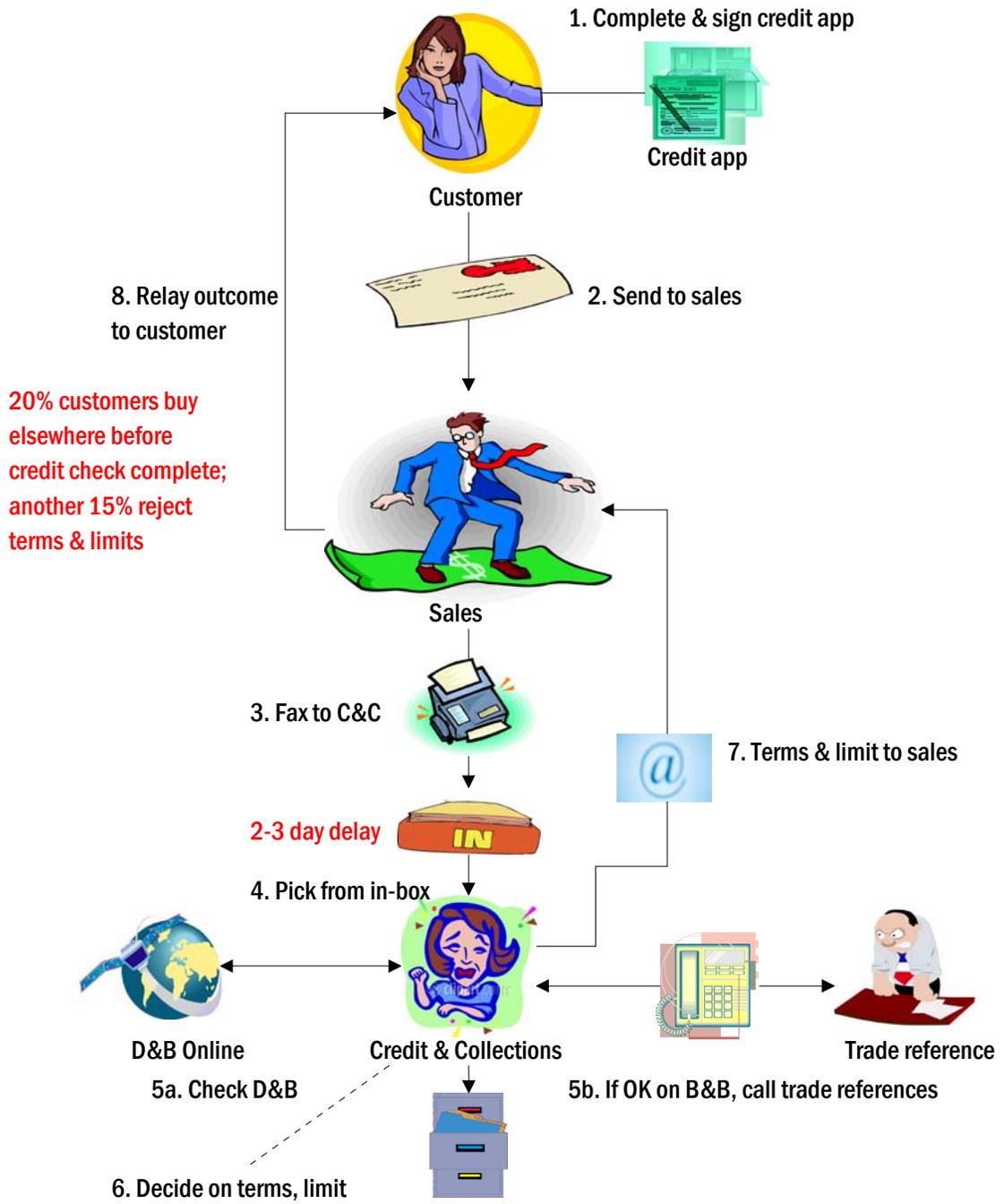
If you’ve read our whitepaper, [Visual Workflow](#), you’ll already be familiar with how VW maps workflow and information flow as a single entity, and why VW maps use literal symbols instead of process symbology. But if you haven’t, in office process (also called human process or knowledge worker process) work relates to information much differently than in manufacturing. Work is creating, modifying, receiving and sending information, which makes workflow and information flow inseparable.

Regarding the unusual mapping style, mapping with literal symbols effectively communicates with business-side people with no prior process experience. That’s a key difference between VW and manufacturing process approaches.

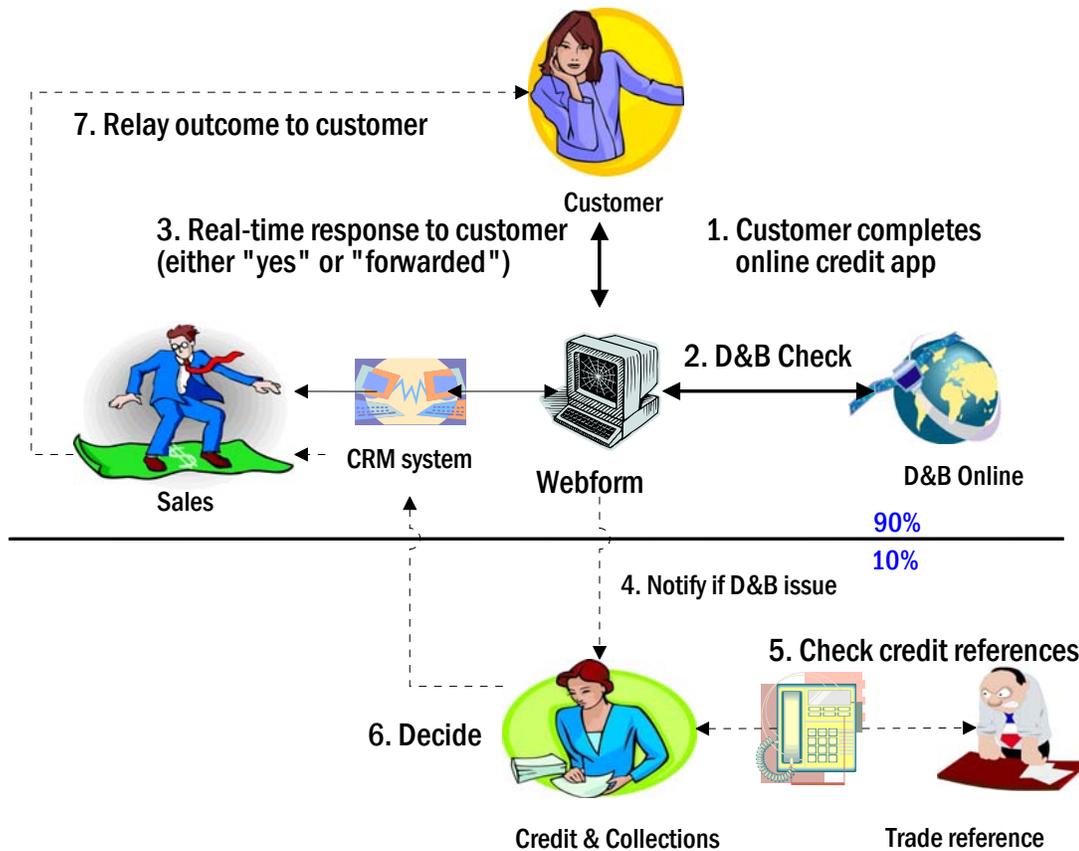
Three communication steps

An important side benefit of mapping workflow flow/information flow together is simultaneously producing information flow documentation for IT, which can work right off your workflow maps to identify the requisite systems architecture for supporting process. Here are sample “as is” and “to be” maps of the same function.

As-Is Pictograph-Granting Credit



To-Be Pictograph—Granting Credit



FYI, if you're going to build maps like this absolutely use SmartDraw rather than Visio or iGrafx. The former offers far superior functionality.

Step two

Here's where we switch to science. With workflow designed and documented, the business-side has to drill down to the individual work process level—as in how can individual roles (sometimes individual people) best perform their work in accordance with the flows. It's important to note that individual work process is a dependent function of workflow/information flow—important because process designers trained in manufacturing often start by redesigning individual workflow, a total dead end.

During this drill down process, the folks mapping individual process should note specific user technology requirements at each step and task. When the mapping is complete, the business-side will know what software systems they'll need and how to select from the pool of available applications. In fact, these maps provide excellent background for software presenters responding to an RFP or demonstrating that their application can meet requirements.

Here's a sample page from an individual work process map.

