



HIGH-YIELD METHODS

Designing process for service & front/back office environments

TEN “MUST DOS” FOR DESIGNING CUSTOMER-ALIGNED PROCESS

Dick Lee
Principal
High-Yield Methods

Many companies make a fundamental error at the start of redesigning business process to support customer-alignment. They call over to manufacturing. Or they may call a six sigma or Lean process consultant. Or, they may even call IT. Regardless, the results are the same. Manufacturing (or systems) process denizens wind up applying inappropriate process design approaches in customer-facing areas—which often does more harm than good, and at best produces mediocre results.

How do you know if this scenario is about to do a tap dance on your head? Look for these ten key elements the process design approach you’re about to apply to customer-facing functions—in fact, to *all* variable (non-manufacturing) work environments.

- 1. Start with customer-aligned strategies.** “Customer-aligned process” means business process fully supports customer-aligned business strategies. If you don’t align strategies with process, by default you’ll wind up designing for efficiency, which almost always means taking value away from customers rather than adding value. Ironically, because taking the customer-aligned approach creates the freedom to restructure rather than just trim around the edges, it almost always produces more efficiency than designing for efficiency.
- 2. You need a workflow scanning tool.** Workflow describes the movement of work and information from work station to work station, function to function, and between functions and external stakeholders—like customers. Compared to

variable work environments, including front office functions, manufacturing has relatively few key workflows—so few that there’s no need for a scanning tool. But assessing variable work environments often including hundreds of workflows requires a powerful and *fast* workflow assessment tool.

3. **Workflow redesign must be coupled with information flow redesign.** In variable environments such as sales, marketing and customer care, work means managing and communicating information. Work and information are tied at the umbilical cord. So if you optimize workflow, it only makes sense that you have to change information flow with it. Manufacturing process methods don’t need to factor in information flow because work is performed on physical objects, not information.
4. **Workflow must be uncoupled from individual work process.** In variable environments, the vast majority of work impediments, time loss, work errors and other defects—especially failure to deliver value to customers—occur at the workflow level, *not* at the individual work process level (which describes how individuals do their own work). So why start off looking at very detailed work process, as Six Sigma does? You’ll only lose the forest for the trees. Further, you’ll proceed at a snail’s pace, which you can’t afford because variable environments include so many flows.
5. **The drill-down to work process occurs after workflow is redesigned.** Individual work process is a dependent variable in variable environments. It has to support the workflow above. In manufacturing, work process is more independent. And by the way, Lean has no mechanism to reengineer and document individual work process, which is essential for the front office and most other variable settings.
6. **The process approach has to “specify” systems architecture changes.** Please don’t get thrown by the fancy “systems architecture” term. Systems architecture describes how the various technology components are arrayed and connected—which is vital to getting the right information to the right place at the right time. Of course, you don’t hand IT a piece of paper and say: “Do this.” IT should be involved in workflow redesign so they’re already up to speed on what’s happening.

But information flow must follow workflow, not the other way around, making your redesigned workflow a blueprint for IT to follow.

7. The work process reengineering must lead to application software requirements.

Variable workers need application software tools for managing and communicating information. And if the work process design doesn’t produce software requirements, you’ll inevitably wind up with software that’s misaligned with work. Manufacturing process folks aren’t concerned with application software.

8. Business process redesign, including both workflow and work process, has to be participative. On the shop floor, people are cogs in a wheel. They have little choice but to conform. Think about sales. Does sales “have to conform” to process changes? Not in our lifetime. And that’s true of almost all variable settings.

Variable workers must be involved in designing their own changes. Otherwise, you’ll raise a brick wall of resistance.

9. Process design must include change management strategies. While manufacturing workstations are “work islands,” variable functions have great interdependency. A change in one may rebound all over the company. Plus, because of the complexity of variable environments, process change inevitably triggers unintended consequences that must be carefully managed. Companies have to carefully plan and stage change—and the planning has to emanate from the process work.

10. The process methodology has to be accessible to all. Because variable process change is a participative endeavor involving mostly “non-process” people, process symbology is out. So is specialized process vocabulary. And training a special cadre of non-process people in a process approach only creates “process police,” who try to take away variable worker empowerment—often with disastrous outcomes.

Making sure your process methodology observes these nine basic rules will prevent you from trying to drive square process pegs into round process environments.

Consultant, author, educator Dick Lee, Principal of High-Yield Methods, ranks among the leading practitioners of business process design for office (non-manufacturing) environments and CRM/CEM. While his influence is global, for travel and family reasons Dick works primarily in the U.S., with numerous clients in the upper Midwest, close to his home base of St. Paul, MN. To comment on this white paper or to contact Dick, e-mail dlee@h-ym.com.