Business Process Improvement: Mission Possible!

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What is it and why?

A method to identify potential areas in a process that:

- Consume excessive resources:
  - Time
  - Budgets
  - Personnel
- Bottleneck the flow of information or documents
- Do not effectively utilize available technologies
- Do not meet the needs of staff, administrators, students and other stake holders
- Do not align with current policy and regulations
- Are not well understood or are incomplete
- Enables you to gain a complete understanding of the service area where the process resides

When is Business Process Improvement (BPI) commonly applied in higher education settings?

- As a means to help reach a new vision or mission
- When a new technology is about to be applied
- When policies or regulations change
- On a regular basis of review of the operations
  - This is a sign of a healthy process environment
  - While students are not "widgets", most manufacturing processes now require the documentation of a process as a matter of course in business

Components

1. Process mapping – Understanding how the process currently works in the real world
2. Process re-engineering – Making the process better
3. Change management – Throughout

Dimensions of Change (Source: UK NHS Institute for Innovation and Improvement www.institute.nhs.uk)

- Comfort zone – status quo change is unlikely
- Discomfort zone – uncertainty but more likely to change an learn
- Panic zone – people freeze and will not change or learn

Effective Facilitation is Key to Success

Good facilitation is key to process re-engineering

- Asking questions that start with, "What if?", can lead to discussion of the pros and cons of trying something new
- Make sure that people are heard
- Sometimes, it requires a nudge to get people to try something new
- This is where skilled leadership can help

- Be clear about goals, roles and procedure
- Confirm expectations
- Facilitation is not –
    - Chairing a meeting
    - Group therapy or counseling
    - Not teaching and training

Tips for Effective and Sustainable Change (from *The Change Handbook*, 2006)

- Explore other's assumptions
- Seek and expand common ground
- Shape a desired future
- Generate authentic human connections across siloed organizations
- Jointly take ownership of the solutions to the issues at hand "We are all in this together."

Process Mapping

Building your team

- Involve all appropriate staff, both new and veteran
- Don't assume all offices, or people within an office do it the same way
- Include representatives from offices that touch the process from start to finish
- Include all parties in each discussion, particularly if the process crosses departments
- Involve students as needed to include their part in a process

Map the process as it exists today

Seek to understand why it works the way it does

- Ask questions to understand but not challenge the process
    - What is working well?
    - What is the benefit of a particular step/action?
    - How long has this process been used?
    - What policies or contracts dictate how a particular step in the process must be completed?
    - What technology is being used to support the process?
    - What are the exceptions to the process?
    - How much time is used in each step?

Some Common Goals in Re-engineering

- To become 'best of'
- Improve service
- Eliminate silos
- Decentralize a process
- Take advantage of technology
- Eliminate paper
- Align with compliance requirements

Process Re-Engineering

A holistic approach that involves all process stakeholders in constructive inquiry with the common overarching goal of improving service.

Uses the process map to analyze potential areas of change OR start from a clean slate either way aim to -

- Challenges the status quo:
  - Where are the problems?
  - What do people like least about this?
  - Are we meeting processing or response time goals?
- Review the technology that supports the process
- Identify improvement opportunities, especially high-impact improvements
- When improvement opportunities are identified; offer quick and tangible results; and make sure to communicate changes and results to all stakeholders.
- Involve a mix of front-line staff and administrators
- Assure that there is an atmosphere of "no wrong answers"
- Front-line staff often can see the places where time and effort are being wasted and/or areas where stakeholders may complain about unmet needs
- Involve a mix of veteran and new employees
  - Veterans possess process and policy history
  - New employees see obvious areas where process breaks down and may have some insights from outside experiences

Encourage new ideas

- From within your teams
- From all stakeholders (students/faculty/staff)
- From outside experts to help you analyze your practices against best practices or other successful ways of doing things
- Some changes will be minor, but impactful
- Don't be afraid to wipe the board clean!

Document the new process

- New process map now serves as the "current" process map
- Helpful for training new employees
- Good resources to have online and in training manuals
- Establish improvement goals - measures of success
- Share the new process

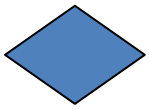
Measure Success

- Meet your goals?
- Reduce silos and increase collaboration and understanding of services?
- Increase available one-on-one time with students?
- Optimize technology?
- Reduce the total time for a process?
- Eliminate unnecessary steps?

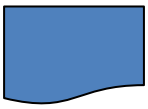
Standard Flowchart Shapes

Process: Show a Process or action step.

Off-page Connector: shows continuation of a process flowchart onto another page

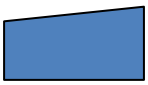


Decision: Indicates a question or branch in the process flow.



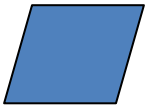
Document: Used for a process step that produces a document.

Predefined Process: A marker for another process step or series of process flow steps that are formally defined elsewhere.



Manual Input: Show process steps where the operator/ user is prompted for information that must be manually input into a system.

Manual Operation: Show which process steps are not automated.



Data (I/O): Indicates inputs to and outputs from a process.

Terminator: Show the start or stop points in a process.

Connector to Another Process: Used to show a jump from one point in the process flow to another.

Some Flowcharting Solutions

Visio	Cacoo
Flowcharter	Diagram.ly.com
Creately	Smart Diagram Pro
Lucidchart	Cubetto App
Gliffy	Lovely Charts

Resources

A Handy Guide to Facilitation (2010) NHS institute for improvement and innovation http://www.institute.nhs.uk/images/documents/No_Delays/2010%20Handy%20Guide%20to%20Facilitation%20FINAL%20%28low-res%29.pdf

Balzer, W. K. (2010). *Lean Higher Education: Increasing the Value and Performance of University Processes.* New York: CRC Press.

Holman, P., Devane, T., & Cady, S. (2006). *The Change Handbook: The Definitive Resource on Today's Best Methods for Engaging Whole Systems.* Berrett-Koehler.

Kano Model Analysis http://people.ucalgary.ca/~design/engg251/First%20Year%20Files/kano.pdf

LEANOhio http://lean.ohio.gov/