

WARUCC Conference 2009

Process Mapping “The Theatre of Life”: The RO That Knew Too Little

Presenter: Teri A McIntyre, Grant MacEwan College

Date: June 26, 2009

Presenter Background

Experience:

- 5 ½ years experience working in a Registrar's Office
- 8 years experience working as a business analyst
- 10 years experience working with post-secondary institutions
- Currently employed with Grant MacEwan College, as a business analyst for Project Phoenix

Education:

- BA Honours degree – UofA
- MA in Communications and Technology – UofA (IP)

Member of PMI and IIBA.

Overview

Business processes are the production lines of a Registrar's Office. When processes fail in the RO, services fail students, faculty, staff, and in some instances, the entire organization.

This session will provide an overview of the fundamentals of business process mapping and demonstrate the value of such an activity for post-secondary institutions.

“The Man Who Knew Too Little”

Film Synopsis:

Wallace Ritchie flies to spend his birthday with his brother, James. James has business guests coming over and must find something to occupy his brother until dinner's over.

Wallace ends up taking part in the "Theatre of Life," which promises to treat the participant as a character in a crime drama.

Trouble begins when Wallace answers a phone call intended for a hitman, and is mistaken for a real spy. He becomes tangled up in a plot to kill Russian and British dignitaries on the eve of the signing of an important peace agreement between the nations. For him, it's all an act, but to the men who want a second Cold War, Wallace is public enemy number one.

Tag Line:

He's on a mission so secret, even he doesn't know about it.



“The RO That Knew Too Little?”

Everyday, staff in a Registrar’s Office partake in the “Theatre of Life” of their institution. They are a participant as a character in various scenarios and situations.

And, with each character comes a set of skills and knowledge that a staff member draws upon for a successful scene/production.

For a student...	babysitter, best friend, assassin
For a faculty member...	roadblock, partner-in-crime, mediator
For an organization...	jailer, bondsman, judge, champion
For a community...	guardian, peacekeeper, helping hand

“The RO That Knew Too Little?”

Staff also draw upon the 3 P's:

Policies

Procedures

Processes

“The RO That Knew Too Little!”

But, does the RO know too little?

No!

If anything, it could be stated that it knows too much.

Which is why business processes are so important to its survival and growth; they can tie everything together and make the roles played by staff members more efficient, effective, and fulfilling.

Business Processes

What is a Business Process?

“It is a set of coordinated **tasks and activities**, conducted by both **people and equipment**, that will lead to accomplishing a **specific organizational goal.**”

--http://searchcio.techtarget.com/sDefinition/0,,sid182_gci1088464,00.html

Simple Formula

$$\frac{\text{Goals}}{\text{Activities/Tasks} + \text{People/Equipment}} = \text{Process}$$

Business Process Mapping

What is Process Mapping?

With any business, there are times when business processes do not work as effectively and/or efficiently as they should. Or, they may not work at all.

This is where business process mapping can be championed.

Business process mapping is a tool that takes into account:

- business objectives
- work being/to be accomplished
- client impact

And as a tool, it represents a process or a series of processes to aid in defining the activities of a business entity, all the people responsible for the activities, the quality of the process execution, and the desired achievement level.

Why Process Map?

Organization Evolution

Organizations grow and change over time and space. To deal with expansion and change, quick-fix solutions are often implemented to maintain a certain level of throughput or output.

A common quick-fix is to increase labour resources.

Quick-fixes work in the short-term. But they tend to reinforce incomplete or inefficient business processes. They are disablers to long-term innovation, by providing a false sense that everything is going well.

Why Process Map?

Diagnostic Engine

- Identifies bottlenecks, waits, delays, gaps, duplications, issues.
- Identifies ownership for the process and encompassed tasks/activities.
- Identifies inefficiencies through a controlled fashion.

Why Process Map?

Tangible Representation

- Is a visual method to explain processes.
- Creates a 'vision' of what is and what is to be
- Establishes a shared language for enhancing and achieving business goals.

“A picture is worth a thousand words.”

What? How?

So, what is involved in mapping?

Processing Mapping - 4 Steps

According to J. Mike Jacka and Paulette J. Keller, in their book *Business Process Mapping: Improving Customer Satisfaction*, there are 4 major steps to business process mapping:

- Process Identification
- Information Gathering
- Interviewing and Mapping
- Analysis

1. Process Identification

In this step, importance is placed on attaining a full and complete understanding of existing processes.

This can be achieved through different methods: documentation, job shadowing, interviews, workshops, etc.

It is important to note that most organizations believe they know their business processes. For example, if we were to start a 'straw dog' of processes as defined by a Registrar's Office, some processes identified may be:

Registration
Transcript Maintenance/Production

High School Admission
Program Transfers

1. Process Identification

While it is important to collect processes from the business entity being examined, focusing solely on a business perspective can create a siloed approach to how processes are identified and defined.

Such an approach loses a client-centric approach. Processes based on an organization's understanding loses context; they also should be defined based a client's understanding.

Identifying processes from multiple perspectives leads to cross-functional understanding and to a comprehensive rendering of a specific process.

2. Information Gathering

In this second step, effort is expended on identifying the risks, controls, and objects in a given process.

There is much discovery work that needs to be completed to discover all the ins and outs of a process.

Jacka and Keller talk about using worksheets – Process Profile Work Sheet and Work Flow Surveys – to document the outcomes of this step. The Work Sheet all the vital information regarding a process such as the trigger events, objectives, risks, etc. The Survey is completed by the individuals actually working on the process and lists their tasks.

2. Information Gathering

A key piece of data determined through this step are the process owners.

Process owners are those individuals that can execute change to a process. Without their agreement and support, mapping activities will not get far in an organization.

For example,

Process	Owner
Transcript Production	Records Supervisor
Transcript Design	Registrar or Assistant Registrar

3. Interviewing and Mapping

For the third step, emphasis is on understanding the view points of the individuals in a process. This may require sitting with the individuals to get the nuances of the process that they may not have logged during the information gathering step.

It is at this step that the actual process mapping activities are initiated.

The mapping effort may take different forms, depending on the mapping technique used.

4. Analysis

In the final step, tools and methodologies are leveraged to analyze the process to identify improvements to make it run more effectively and efficiently.

Although this is the last step, this analysis work inherently occurs throughout all the other steps.

For example, it may be discovered during the information gathering step that RO objectives for posting final grades do not match the success factors assigned to the process.

Business Process Mapping Techniques

Mapping Techniques

There are different techniques for mapping that can be used to complete business process mapping.

Choose the technique that fits best with your organization.

If you chose a technique that people do not understand, then the use-value of the process mapping project is lessened.

UML

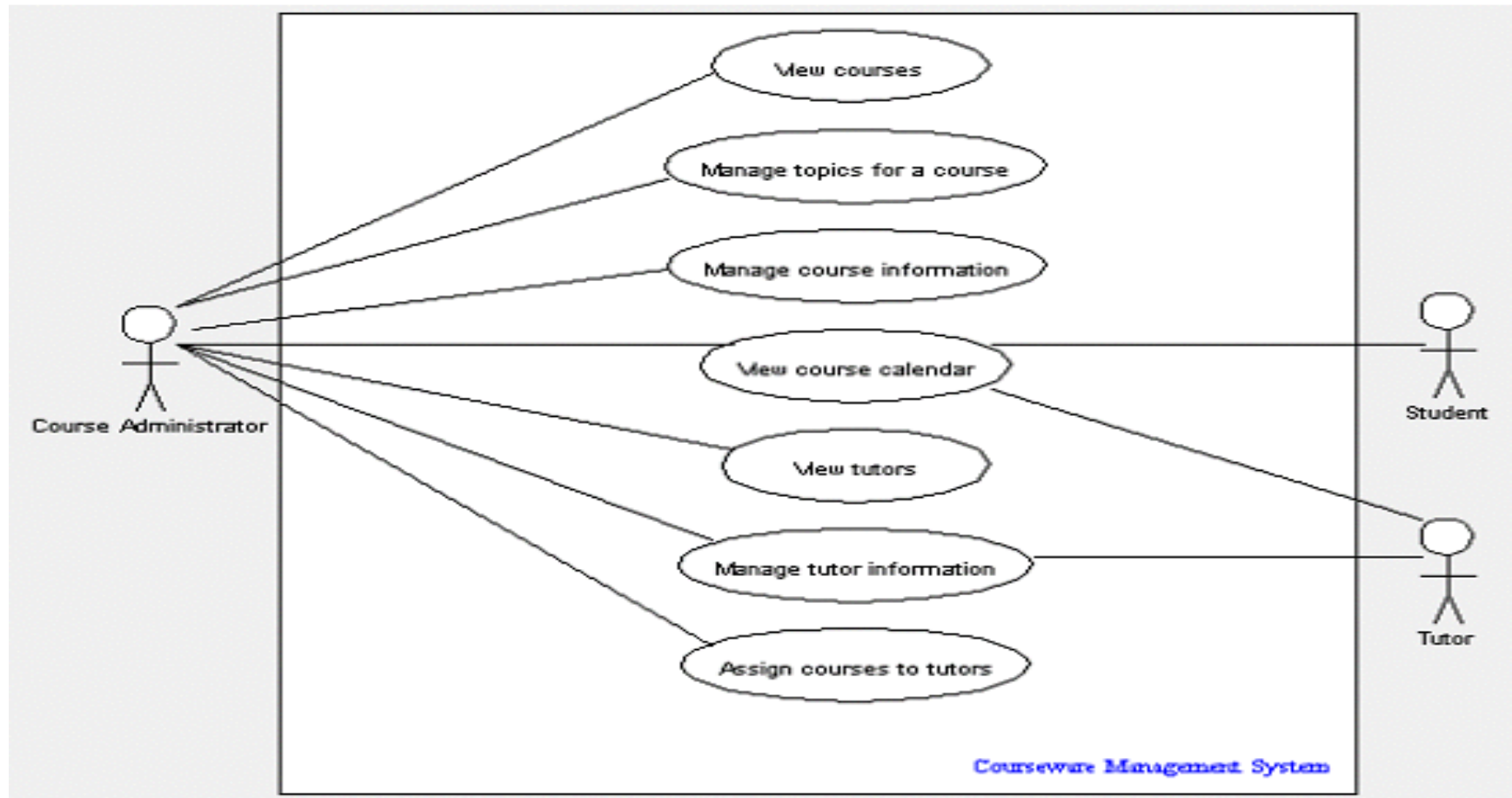
Unified Modeling Language

- Graphical language used for object-oriented software engineering
- Has approximately 12 different diagram types that are used at various phases of a project.

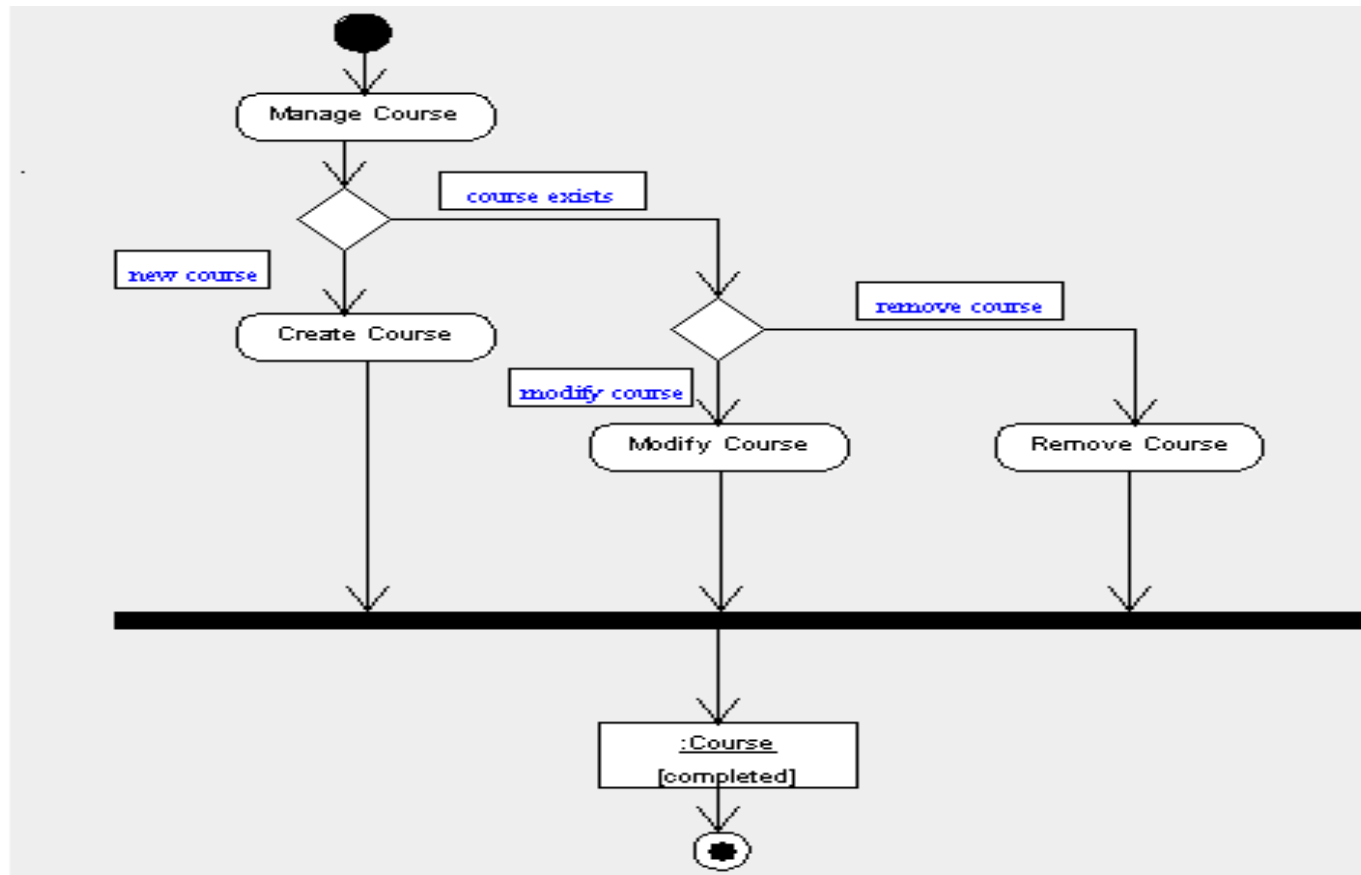
For example,

- For requirements gathering, the Use Case, State, and Activity diagrams may be used.
- For design, the Class and Object diagrams may be used.

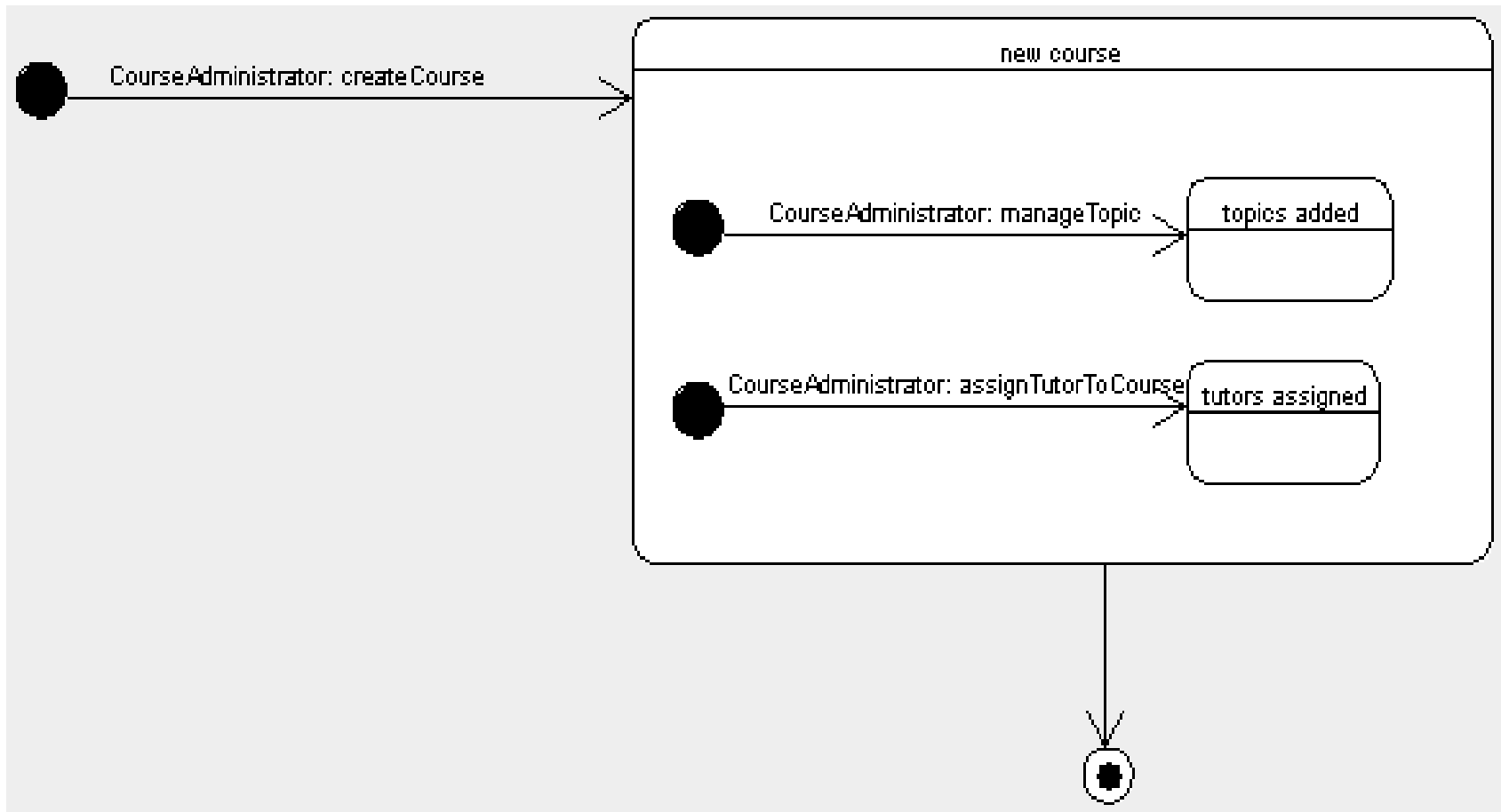
UML Example – Use Case



UML Example – Activity



UML Example - State

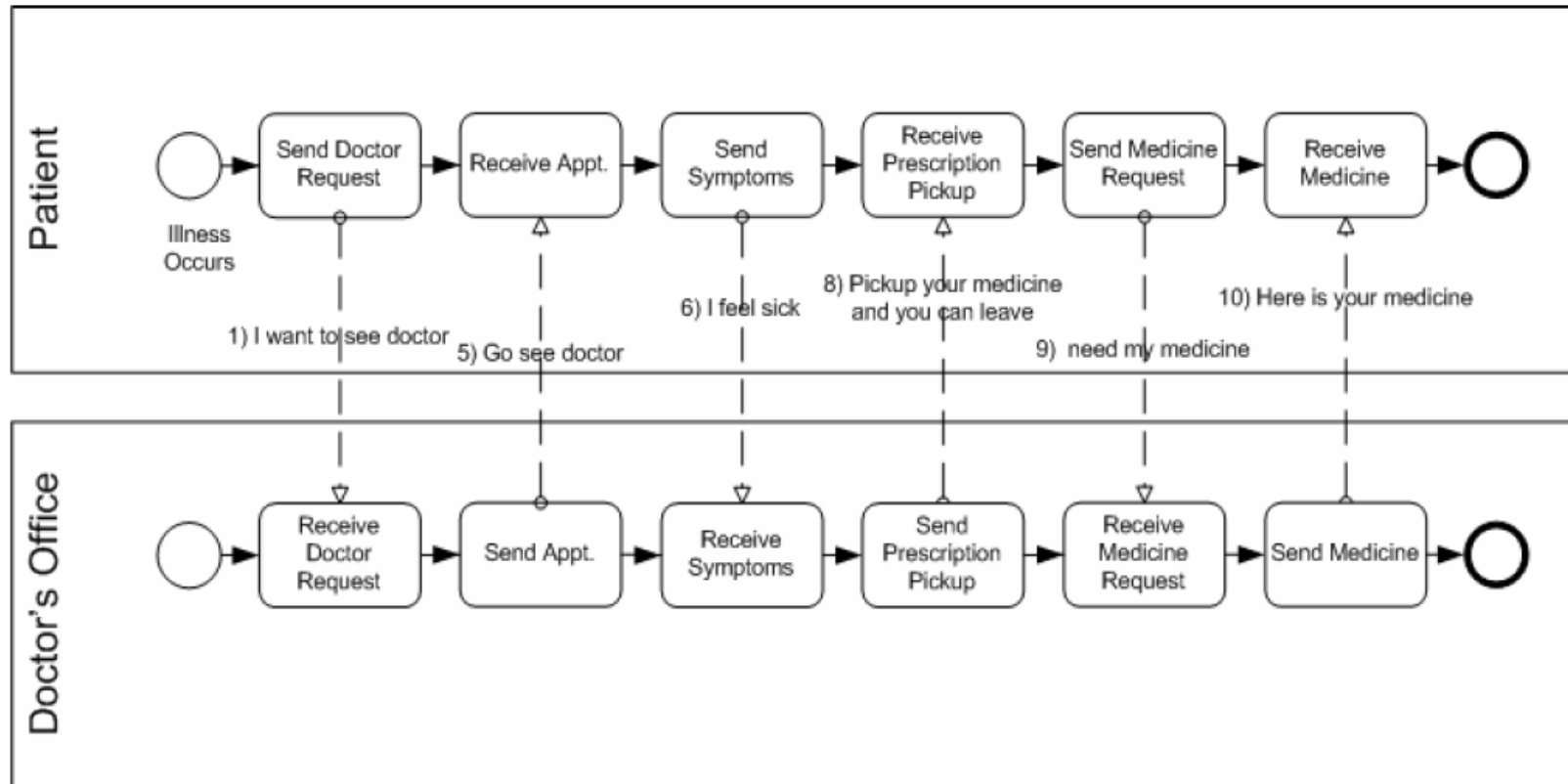


BPMN

Business Process Mapping Notation

- Based on flowcharting technique.
- Goal is to provide a standard notation format that is understandable by both business and technical users.
- It has a small set of modeling elements that reduce confusion and over documenting:
 - Flow Objects – activities and events
 - Swimlanes – pool, lane
 - Connecting Objects – the sequence flow, message flow
 - Artifacts – data object, notation

BPM - Example



Summary

Summary – Additional Points

- Do not underestimate the time requirement for process mapping.
 - Rome was not built in one day
- No one person can own all the processes.
- Start mapping when it makes sense.
 - If a process is simple and contained, then you may want to complete it earlier than a process that is large or complex.
 - If you have numerous process participants to reconcile.
- Not every process needs to be mapped.
 - Prioritize
- Have fun!

Resources

Object Management Group – resources on UML and BPMN

<http://www.omg.org>

Business Process Mapping: Improving Customer Satisfaction

J. Mike Jacka and Paulette J. Keller

International Association of Business Analysis

www.theiiba.org