

➤ Designing a new process



ASSESSING PERFORMANCE // IMPROVING QUALITY // CREATING CONFIDENCE

Use this guide when the Customer 1st Review shows that you are doing something in an informal way and need to develop a formal process for doing it.

1. Identify all of the people who are currently involved in the activities that make up this process. Ask them to become part of a working party to design the new process.
2. Ask them to attend a meeting to design a formal process. It is useful to have someone chair or facilitate the meeting who is usually not involved in these activities on a day-to-day basis.
3. State the name of the process. Identify the process owner. This is someone who has the accountability for this process working on a day-to-day basis.
4. Identify the team who will operate this process. These are the people who perform the activities that make up the process. They may not be part of the same work team or department at present.
5. Describe briefly what the process is designed to do. For example, prepare tenders, or invoice customers.
6. Identify the inputs into the process. The people who provide these inputs are suppliers to the team that operates the process.
7. Identify the main outputs from the process. The people who use these are the customers of the team that operates the process.
8. Identify the start point and the end point of the process.
9. Go back to the start point. Ask the people in the room, "What happens next?" Write this step or activity on post-it note and stick it on the table. Repeat the question and write that step or activity on another post-it note and place it on the table after the last activity.
10. Keep repeating Step 9. It is usual to find that there is a great deal of discussion about what happens and the order in which the activities are done. Because you have used post-it notes, you can change the order, delete activities or add activities at will. Be prepared to find that two people will do the same set of tasks in two different ways. Remember, there is no single 'right' way. The object of this exercise is to come up with a series of steps that everyone agrees to follow.
11. When you have a list of agreed steps in an agreed order, draw a flow chart showing how the process operates. Electronic white boards are great for this exercise.

12. Identify 2-3 key performance indicators (KPIs) for the process. These are things that you can easily measure that will tell you how well the process is operating. For example, for invoices you might measure the number of incorrect invoices per week.
13. List other documentation related to the process and state where it can be found. You may find it necessary to write specific work procedures for certain activities.*
14. The outputs from steps 11-13 above should be circulated to staff who have any contact with the process which has been developed. Their feedback should be collected and reviewed by the working party at a review meeting held 2-3 weeks after the first meeting.
15. Once you have revised the process, you are now ready to implement it.

** Many people confuse a process and a work procedure. A process is a series of activities whereas a work procedure refers to how a particular activity is done. For example, making a cup of tea is a process, boiling the kettle is an activity. A flow chart would show the process. A work procedure would explain how to boil the kettle.*

Further reading:

*Putting the Customer First by Ian Brooks,
Nahanni Publishing, 2003.*

This book can be ordered from www.nahanni-publishing.com



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