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Process optimisation: untie knots in organisations in six steps

A checklist approach to finding pain points

Many companies want to improve their workflows. But instead of rethinking the processes completely in a greenfield approach it is worthwhile considering a step-by-step, pragmatic approach. Namely, to untie knots in the organisation to gradually address the problems and pain points. The advantage: This gentle approach has often a higher acceptance rate with employees, because it preserves a lot of the familiar ground. It maintains employee performance during process optimisation.

Order processing at a medium-sized plastics specialist stalled. Cooperation was the problem. There was a long list of issues: inaccurate documentation of order data, late acknowledgments to customers, erroneous fulfilment of special requests and late invoicing. The work processes in the rapidly growing company had simply become too complicated. For months, the managing directors shied away from completely revamping the processes. "It takes forever to get everything working," they said, "and a lot is going well. We just have to untie a few knots." That was exactly what they decided to do - to untie one knot after the other during operation. After the first inventory, the company listed about fifty barriers to its operations and then started to tackle the key issues. A year later, many knots were already untied.

More and more companies are looking for pragmatic ways to improve their work processes. Instead of taking a greenfield approach they proceed cautiously. They work on weak points and iron out errors - without directly challenging all processes. The advantage: The preservation of the tried-and-trusted. Together with the company, they solve problems that they have often recognised themselves. Therefore, the performance does not suffer when employees are switching to the changed processes. "The approach of small steps is usually well accepted," explains Wolfgang Rabl, Managing Director of the consulting firm "next level consulting". In addition, companies focus on real problems and quickly achieve tangible results. But even this pragmatic approach needs a lot of preparation. Wolfgang Rabl describes a six-point plan, with which companies optimally untie the knots in their organisation:

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First: As-Is analysis and envisioning

At the beginning you have to acknowledge that processes have to be changed. Wolfgang Rabl recommends to define a common view so that the planned changes can be explained and justified better. For example: Where should the company be in four years? Where is the journey going? What is the purpose of the improvements? Professionals develop distinctive headlines for this: "We want to underpin our technological competence with customer friendliness and reliability". Or: "We put the customer at the center of our workflows and processes." Such a common picture, the vision, as well as the explanations provide employees with important orientation.

Second: Make a strategic decision

As tempting as the strategy of the small steps sounds - companies should proceed with caution down this route. "With this approach, we pick up real problems and everyday worries of the employees," explains Wolfgang Rabl, "we carefully evolve what already exists." Those who are looking for a big hit and want to fundamentally change an organisation may prefer to completely redesign their processes. It is also important that the decision be made by top management. The approach of the small steps also requires the backing of the management. In plain language: The top should explicitly commission the change project, justify, explain and lead it - and then support it all the way to the end.

Third: Take stock

Where are the knots that stand in the way of the company's success? Many companies use interviews to identify the barriers. They ask their employees about the pain points: Where are the disturbances in the processes? How do you explain mistakes? Where are problems? What causes stress? Change professionals also ask what works best and where the strengths of existing processes lie. "It is always worthwhile to include these strengths in the change and to build on them," says Wolfgang Rabl. For example, if a department has successfully introduced a 15 minute team meeting in the morning, other departments may want to adopt this as well. In practice it has proven successful that interdisciplinary work teams that deal with the knots are also later made responsible for untying them.

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In addition to employees from different departments, these teams should also include colleagues who mastered process management and who are prepared for the specific task at hand.

Fourth: Survey the knots

Some companies fail because they want to untie too many knots at once. A thorough inventory often leads to an explosion of the number of knots identified. It is important to list the knots carefully, categorise them and decide on their priority. Which knots cause the most urgent problems - and require urgent untying? Which issues have a high improvement potential - even if their resolution does not seem urgent?

Fifth: Profile each knot

If you overlook the knot, you cannot untie it. Blind trial and error only tightens the noose. Experts recommend that the interdisciplinary work teams carefully study "their" knots and describe them in a profile. Such a profile includes information about the initial situation and the problem that the knot causes - in addition to the goals, the approach, the interfaces involved, the risks, the deadlines, the (internal and external) effort, the tasks involved, and the responsibilities within the interdisciplinary work team.

Sixth: Untie the knots

With the help of the profiles, the work teams address one knot at a time. Professionals recommend involving the employees in the enhancement who will later work in the optimised workflows. On one hand, participation increases acceptance and improves success. On the other hand, the employees have a wealth of experience. They can provide important insights into the design of the processes. "The work teams define the new processes together with the affected employees in workshops." explains Wolfgang Rabl. But in the ardour of success, the work teams should not untangle too many knots at the same time. Professionals work on no more than a dozen issues at a time, even in larger companies. As sympathetic and pragmatic as the approach of small steps may seem - even the loosening of knots takes time, energy and, above all, care.

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