

BUSINESS PROCESS IMPROVEMENT CHECKLIST



By: Don James and Joe Bockerstette





The Business Process Improvement Checklist

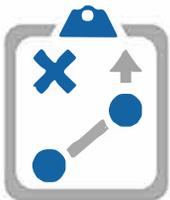
Significant and sustainable Business Process Improvement is achievable through a simple, standard methodology that can be taught to all employees and systematically deployed throughout the organization. Before embarking upon a new Business Process Improvement project, assess your organization's preparedness through the checklist of key considerations below.



1. Identify Project Improvement Goals

Meaningful goals are essential to the completion of a successful project. They can range from cost reduction to revenue enhancement to regulatory compliance. Knowing what you want to accomplish is key to designing a project that achieves your desired outcome.

- Revenue growth
- Quality improvement
- Cost reduction
- Time reduction
- Customer experience enhancement
- Compliance attainment



2. Develop the Project Plan

The project plan includes elements such as the following items that provide a roadmap for successful execution.

- Project team
- Actions
- Timeline
- Resources
- Schedule
- Logistics



3. Select the Business System or Value Stream to Study

All processes within a Business System or Value Stream should be studied as a single project to assess alignment and connectivity. Cause and effect relationships rarely exist within the same process.

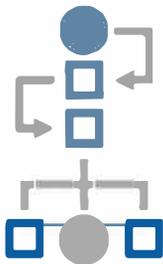
- Business system/value stream scope**
 - Business system/value stream boundaries**
 - Process SIPOCs definition**
 - Process purposes**
 - Process goals**
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4. Identify, Educate and Engage Process Teams

A Process Owner is the most essential element to a successful study of a business process and its improvement, and the viral spread of a continuous improvement culture. Those who do the work should be intimately involved in documenting and improving their work.

- Process owners**
 - Process users**
 - Subject matter experts**
 - Process customers**
 - Process suppliers**
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5. Develop Current State Process Maps

The current state is a beginning snapshot, good, bad, and ugly, of how the process is executed. While there are a variety of process mapping methods available, the fundamentals remain the same. Every process map should define suppliers, inputs, activities necessary to fulfill the process, outputs, and customers. The definition of process boundaries is a particularly important characteristic of process mapping.

- Select mapping tool**
- Schedule mapping sessions**
- Identify customers/suppliers**
- Define main inputs/outputs**
- Define process tasks/decisions**
- Identify information/records requirements**
- Capture problems/opportunities**



6. Assess Connectivity and Alignment

Business System alignment is an essential element of Business Process Improvement, where all Process Owners come together to evaluate their customer-supplier relationships. This leads Process Owners to find and fix the connectivity gaps between processes within the system or value stream.

- Schedule System Alignment Workshop**
- Assess business system/value stream alignment**
- Identify process disconnects**
- Resolve Process Owner differences**
- Update process maps from workshop**



7. Assess Customer Value

The team should assess the Process Owner's understanding of the primary process customer and, when validated with that customer, define the process output specifications that meet that customer's need.

- Define customer requirements**
- Articulate value proposition**
- Determine customer satisfaction**
- Assess customer value gaps**
- Product/service specification**



8. Perform Process Analysis

Process analysis further informs the process improvement opportunities that may be pursued by the team.

- Value added, the assessment of waste**
- Responsibility, the assessment of authority**
- Information, the assessment of knowledge**
- Records, the assessment of documentation,**
- Cycle time, the assessment of synchronization**
- Resource productivity, the assessment of asset performance**
- Process efficiency, the assessment of consumption performance**
- Process effectiveness, the assessment of quality**



9. Identify Process Improvement Opportunities

The process team should identify the problems and improvement opportunities known to exist by process users. We commonly find 50 or more opportunities per process.

- Process development, identified while mapping**
- Process analysis, identified during analysis**
- Discovery, identified while measuring**
- Feedback, identified with customer**
- Identified Quick Wins, fixable within 90 days by process team**



10. Define Process Metrics

Business processes can be measured in several ways. The key to process measurement is designing good measures that evaluate the extent to which the process purpose is being met both effectively and efficiently, who is responsible, and how the process obtains feedback.

- Effectiveness**
- Alignment**
- Reliability**
- Cycle Time**
- Cost**
- Efficiency**
- Productivity**
- Compliance**



11. Redesign Business System or Value Stream

The redesigned Business System is a vision of what processes might become were they able to reach potential. It defines what is attainable by the project team within the organization's constraints of time and budget.

- Standardization**
- Process consolidation**
- Streamlined activities**
- Reduced cycle time**
- Information at the source**
- Clear responsibility & authority**



12. Develop Improvement Plan



The Business System Improvement Plan engages Process Owners with company leadership to define a system-level plan for sustainable business process improvement efforts that are aligned and prioritized.

- Goals, 12-18 month performance improvement intentions**
- Metrics, how to measure goals accomplishment**
- Opportunities, the top themes of the identified opportunities**
- Strategies, projects that will solve the opportunities**
- Tactics, first 90 day actions to mobilize deployment**



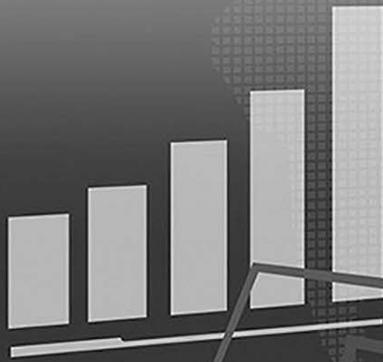
13. Deploy the Business Process Improvement Plan

A Business Process Improvement effort executed well will deploy the strategies identified above. Process performance improvement should be monitored no less than monthly and problems and opportunities that have been resolved should be replaced by new problems and opportunities that are more challenging and deliver greater benefit when solved.

- Quick wins**
- Actions to be taken**
- Personnel changes**
- Change management**
- Training and education**
- Metrics assessment**

In Summary

The Business Process Improvement Checklist provides a methodology for defining a process, understanding how to identify improvement opportunities, how to design meaningful performance measures, how to analyze problems in a systematic way, the different tools used for problem-solving, how to implement process improvements, and ongoing monitoring of business process performance. BEM's Perigon Method is the recognized best practice approach to achieving sustainable process improvement.



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ABOUT THE AUTHORS

Don James founded Business Enterprise Mapping (BEM) in 1993 to find a better way to build business maps that deliver valuable insight. His aim has always been to challenge and simplify work to deliver sustainable performance improvement. He holds a BSEE from Bath University, UK.

Joe Bockerstette has spent more than 30 years driving organization performance improvement, as a CEO, large public accounting consulting partner, private equity partner and angel investor. He has an MBA from Xavier University and a BSIE from the University of Cincinnati.

ABOUT BEM

Since 1993, Business Enterprise Mapping has successfully implemented process-based management and improvement solutions in over 300 enterprises covering 60 industries across 6 continents. BEM has partnered with clients to obtain over 50 international registrations, mapped 3,000 process-based systems, deployed 25,000 business processes and successfully implemented over 750,000 process improvements.

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