Business Process Improvement

PROJECTinsight
Project & Portfolio Management Software
Initiate Project Intelligence®
Moderator

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www.projectinsight.net
Things to Know...

- All participants will be on mute
- Questions are welcome
  - Please use the questions box to ask questions
  - The moderator will select questions
  - All questions will be answered today or by email at info@projectinsight.net
- Webinar recording available in the PI Community
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CEO, Core Performance Concepts Inc.

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Goals of the Fundamentals Series

- Deepen your understanding of fundamental project management concepts
- Identify tools and techniques that can be implemented to manage projects more effectively
- Discover practical applications for your existing projects
- Use project management software more effectively
Objectives of This Webinar

- Describe what is involved in business process improvement projects
- Discover the value of the project vision in BPI projects
- Define the purpose of documenting the AS-IS process
- Describe how the TO-BE process is developed
- Define best practices to implement within Project Insight
Poll: BPI Basics

What do you feel is YOUR biggest issue in business process improvement projects?

- No project vision of the end goal
- Inadequate documentation of AS IS process
- Difficulty in developing a TO BE process
- Uncontrolled change management process
A process in need of improvement
Can affect several parts of the organization
- Operational
- Development
- Customer service
- Project management
Foundation of BPI Projects

Methodologies to

- Plan
- Analyze
- Design
- Develop
- Transition

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Steps to Managing BPI Projects

1. Define business process improvement goals
2. Plan the BPI project
3. Analyze the existing processes
4. Design the new process
5. Develop resources
6. Transition to the new process
Question for YOU

What challenges could you experience when your organization does not have well defined processes?

Please submit your ideas through the question box
Creating a bridge to the future
  - Where is the future?
Link to corporate vision
  - Where does the company want to go?
Defining the Course

- Understand the reason for project initiation—the problem being solved
- Factors affecting success
  - Desires to fix other problems
  - Inserting non-value added activities
  - Lack of knowledge of the business problem
  - Personal agendas
Aligning BPI Projects

Enterprise Alignment Cycle

- Environment
  - Constantly monitor environment for changes
  - Identify threats & opportunities

- Strategy Committee
  - Monitor/Approve
  - Propose new goals and strategies

- Executive Committee
  - Monitor/Approve
  - Modify & align manager's objectives

- Process Change Projects
  - Proposal specific Business process projects
  - Propose changes in IT Infrastructure

- Business Process Architecture Committee
  - Line managers, Process managers, CIO, VP HR, IT strategy representatives

Project sponsor, Project steering team, Facilitator, Process redesign team
Question for YOU

Is there someone in your organization responsible for managing processes? If so, what is the name of that department?

Please submit your ideas through the question box

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Purpose of an As-Is Process

- Internal Processes
- External Processes
- System Work Processes
Objectives of To-Be Process

- Convert to the new process regardless of department
- Establish measures to track managerial performance against objectives
The TO-BE Process

- Recommendation that best supports the business problem to be solved
- Review with an ever increasing audience to gain consensus
<table>
<thead>
<tr>
<th>Process or SubProcess:</th>
<th>IS ( ) or SHOULD ( ) Analysis</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity</td>
<td>Outputs of Activity</td>
</tr>
<tr>
<td></td>
<td>Time/Output</td>
</tr>
<tr>
<td></td>
<td>Costs/Output</td>
</tr>
<tr>
<td></td>
<td>Problems/Decisions</td>
</tr>
</tbody>
</table>
Question for YOU

- What would be the benefit of analyzing the cost impact of every change requested?
- What is the challenge in analyzing the cost impact?

Please submit your ideas through the question box

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Busy Foods, Inc. – Case Study

Customer Needs

Organizational Needs

Project Charter

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Factors Affecting Busy Foods Inc.

Overview

- BUSY FOODS services over 200 clients world-wide.
- Most of BUSY FOOD’S clients are large restaurant venues who can serve thousands in a single day

Situation

- In recent years, long-term clients have started to leave for a competitor who promises overnight delivery of restaurant equipment without a minimum order.

Goal

- BUSY FOODS would like to improve their distribution process to match the competition

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Deliverable: Improve the time from order intake to shipping restaurant equipment to less than 8 hours.

Deliverable: Develop and launch a marketing campaign to clients to educate them on the new equipment shipping process.

Deliverable: Train all internal staff affected by the new business process.

Project Statement of Work

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Question for YOU

What are some of the business process challenges you see for Busy Foods?

Please submit your ideas through the question box

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Project Templates

Kick off a new project in a couple clicks.

Carry over tasks, budgets, assignments, dependencies and more,

Help your team to build a standardized process.
**Poll: Sample Exam Questions**

<table>
<thead>
<tr>
<th>Question</th>
<th>Answers</th>
</tr>
</thead>
<tbody>
<tr>
<td>A change management plan...</td>
<td>A. Contains the procedures for scope changes</td>
</tr>
<tr>
<td></td>
<td>B. Provides the product definition</td>
</tr>
<tr>
<td></td>
<td>C. Provides the direction for managing the change control process</td>
</tr>
<tr>
<td></td>
<td>D. Include corrective action, preventive action and defect repairs.</td>
</tr>
</tbody>
</table>
Review

- Describe what is involved in business process improvement projects
- Discover the value of the project vision in BPI projects
- Define the purpose of documenting the AS-IS process
- Describe how the TO-BE process is developed
- Define best practices to implement within Project Insight
- Questions & Answers ???
Compare Yourself to Others

- Use this link and answer 10 questions about managing virtual teams
- CPC will send out the results to all participants


- THIS LINK WILL BE DISTRIBUTED on Monday, February 17th.
2014 Fundamentals Webinar Series

The 2nd Wednesday of Every Month
- 8:00 am Pacific Time

Topics
- Jan 8 – Estimating Time
- Feb 12 – Conducting Meetings with Virtual Teams (NEW!)
- Mar 12 – Estimating Cost
- April 9 – Business Process Improvement Basics (NEW!)
- May 14 – Techniques to Identify & Assess Risks
- June 11 – Earned Value Basics

Topics
- July 9 – Delivering Quality in Projects
- Aug 13 – Troubleshooting 101 (NEW!)
- Sept 10 – Influencing 101 (NEW!)
- Oct 8 – Lessons Learned Basics (NEW!)
- Nov 12 – Requirements Tools & Techniques (NEW!)
- Dec 10 – Difficult Conversations

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Register Ahead of Time

» Go to www.projectinsight.net

» 2 ways to register:
  - Free Project Management Training
  - Training & Webinar Calendar
Earn PDUs

- You will automatically receive your PDUs via email after the webinar
- For further questions: Janelle.Abaoag@projectinsight.com
- Earn 1 PDU for each webinar session attended
- To register your PDUs go to www.pmi.org
- Login as a member of PMI
- Enter the information provided on your certificate of completion
- Click continue