

# Business Process Improvement



**PROJECT**insight<sup>®</sup>

Project & Portfolio Management Software

Initiate Project Intelligence<sup>®</sup>

# Moderator

**Janelle Abaoag**

Project Insight

*Marketing, Public Relations*

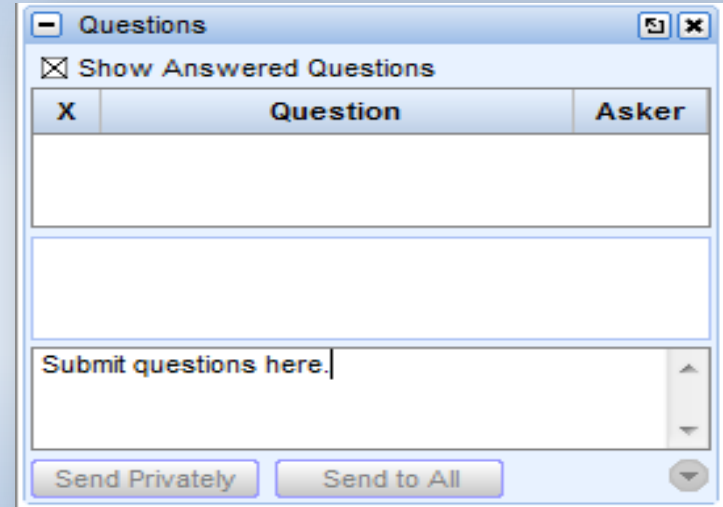
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[www.projectinsight.net](http://www.projectinsight.net)



# 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](mailto:info@projectinsight.net)
- ▶ Webinar recording available in the PI Community



A screenshot of a web application window titled "Questions". The window has a blue header bar with a minus icon on the left and maximize and close icons on the right. Below the header, there is a checkbox labeled "Show Answered Questions" which is checked. Underneath is a table with two columns: "X" and "Question", and a third column labeled "Asker". The table body is empty. Below the table is a large text input area with the placeholder text "Submit questions here.". At the bottom of the window, there are two buttons: "Send Privately" and "Send to All". A small circular icon is visible in the bottom right corner of the window.

X	Question	Asker
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Submit questions here.

Send Privately Send to All

# Presenter

## Diane C. Altwies, MBA, PMP

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*Training in project management,  
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business analysis, agile and six sigma*

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Project Management Institute*



# 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



# Business Process Improvement



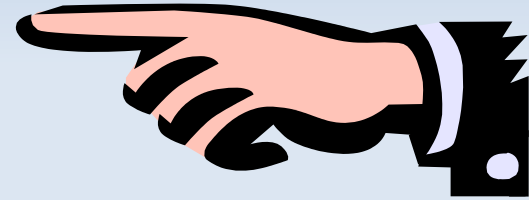
- ▶ A process in need of improvement
- ▶ Can affect several parts of the organization
  - Operational
  - Development
  - Customer service
  - Project management



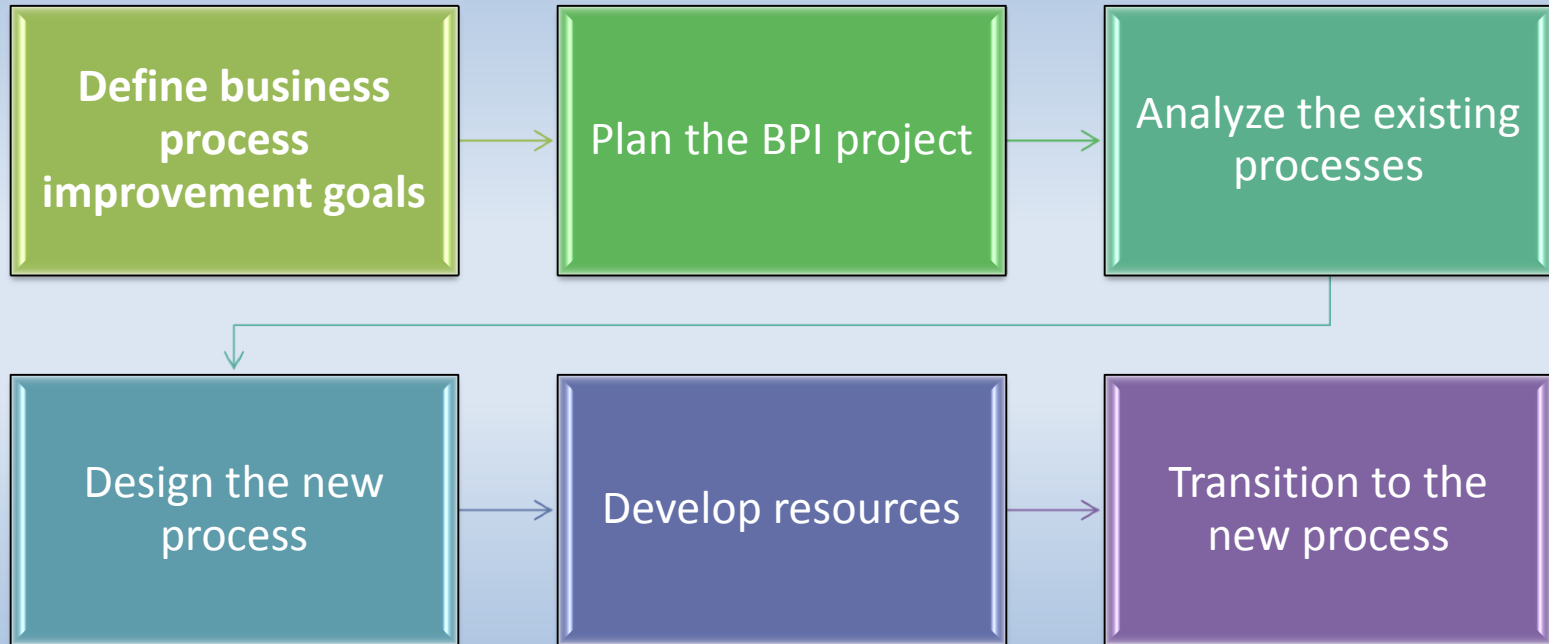
# Foundation of BPI Projects

## ► Methodologies to

- Plan
- Analyze
- Design
- Develop
- Transition



# Steps to Managing BPI Projects



# Question for YOU



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

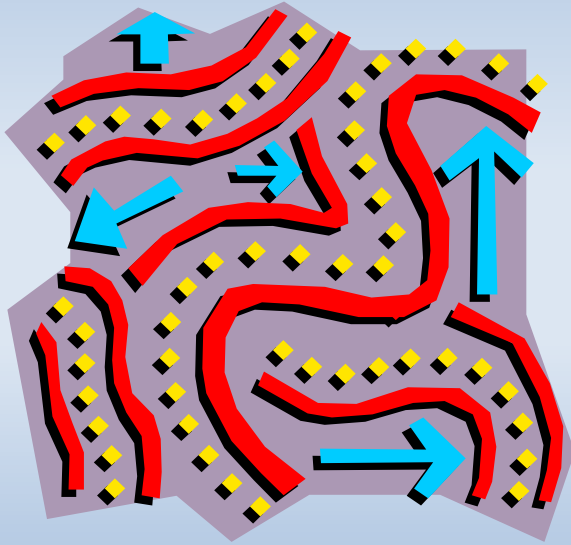
*Please submit your ideas  
through the question box*

# BPI & Project Vision

- ▶ Creating a bridge to the future
  - Where is the future?
- ▶ Link to corporate vision
  - Where does the company want to go?



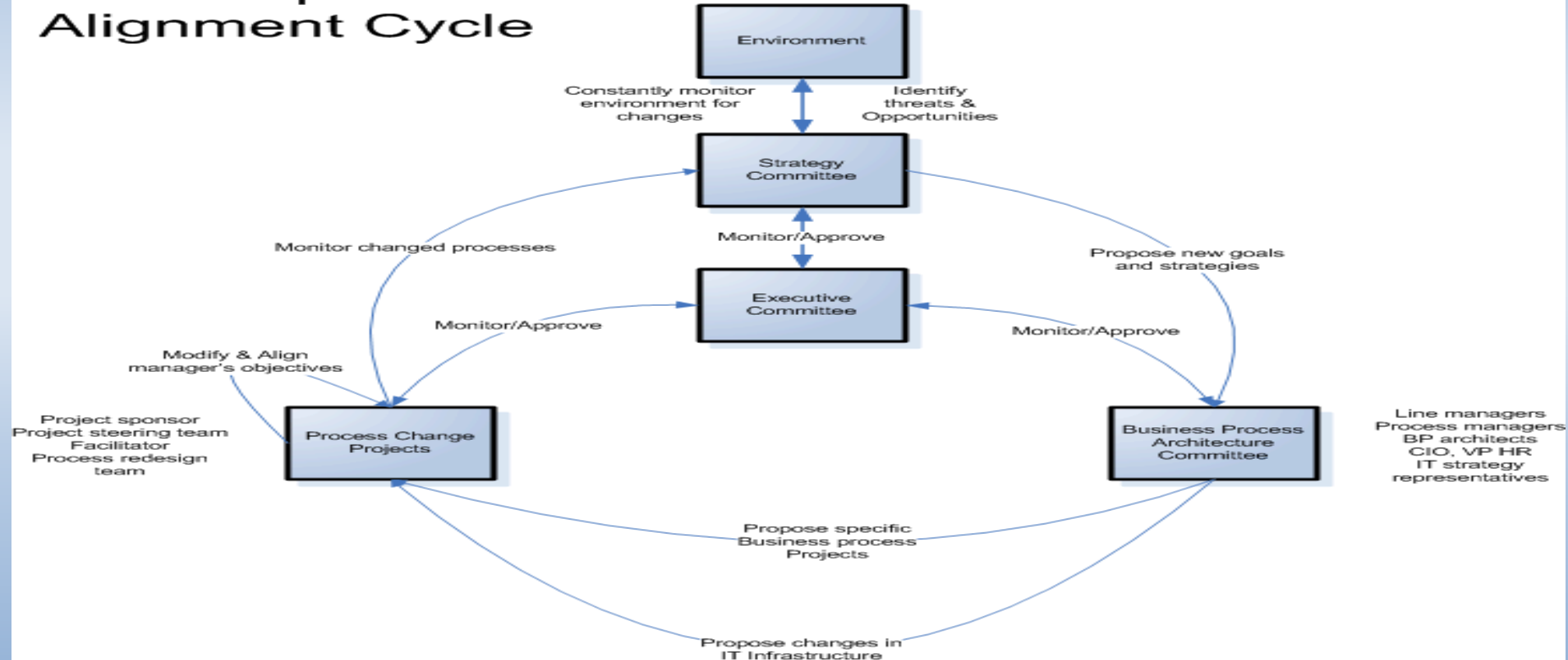
# Defining the Course



- ▶ 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



# Question for YOU

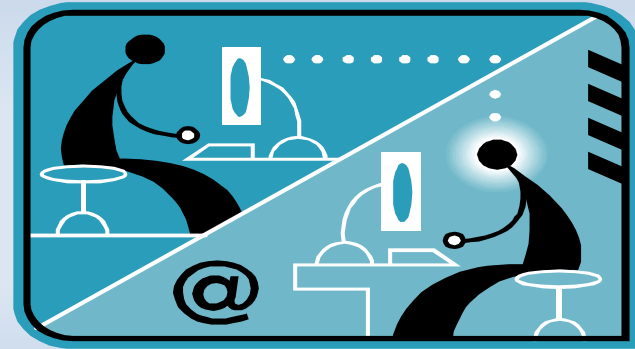


- ▶ Is there someone in your organization responsible for managing processes? If so, what is the name of that department?

*Please submit your ideas  
through the question box*

# Purpose of an As-Is Process

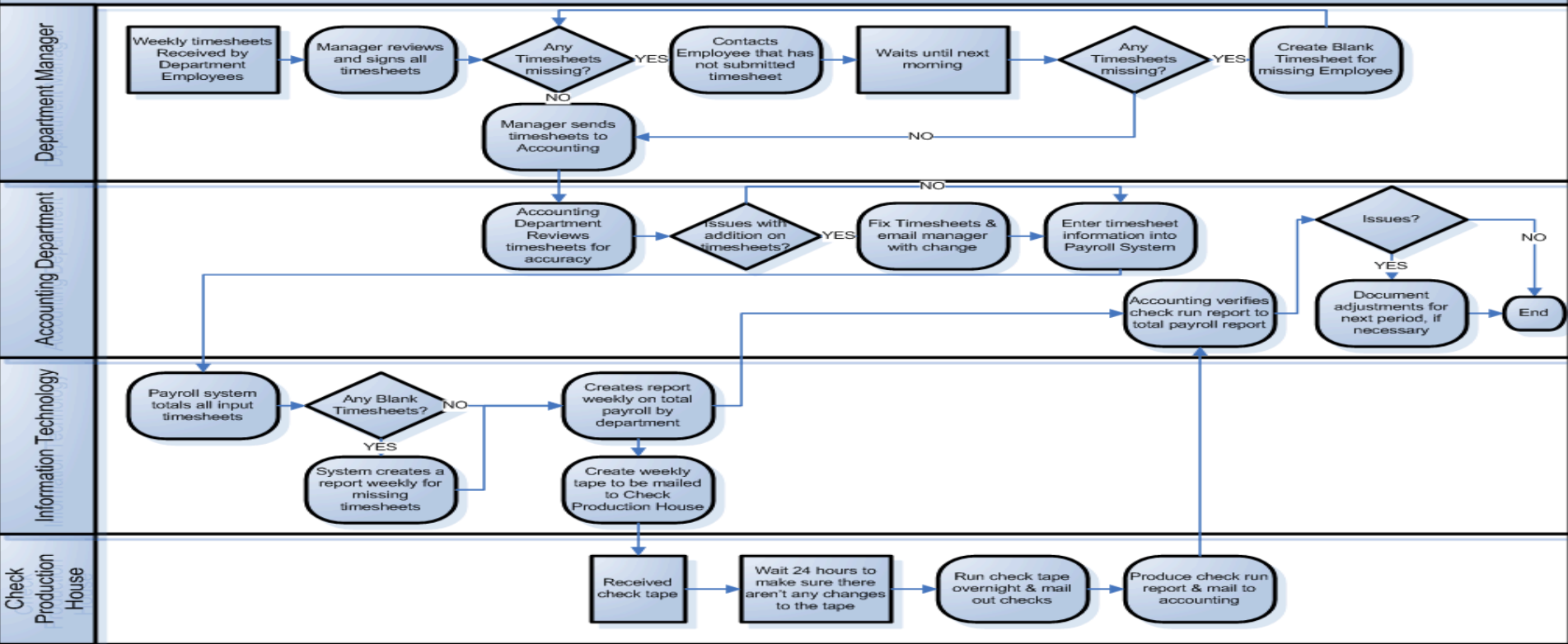
- ▶ Internal Processes
- ▶ External Processes
- ▶ System Work Processes





# AS-IS Process Model

## Processing Payroll

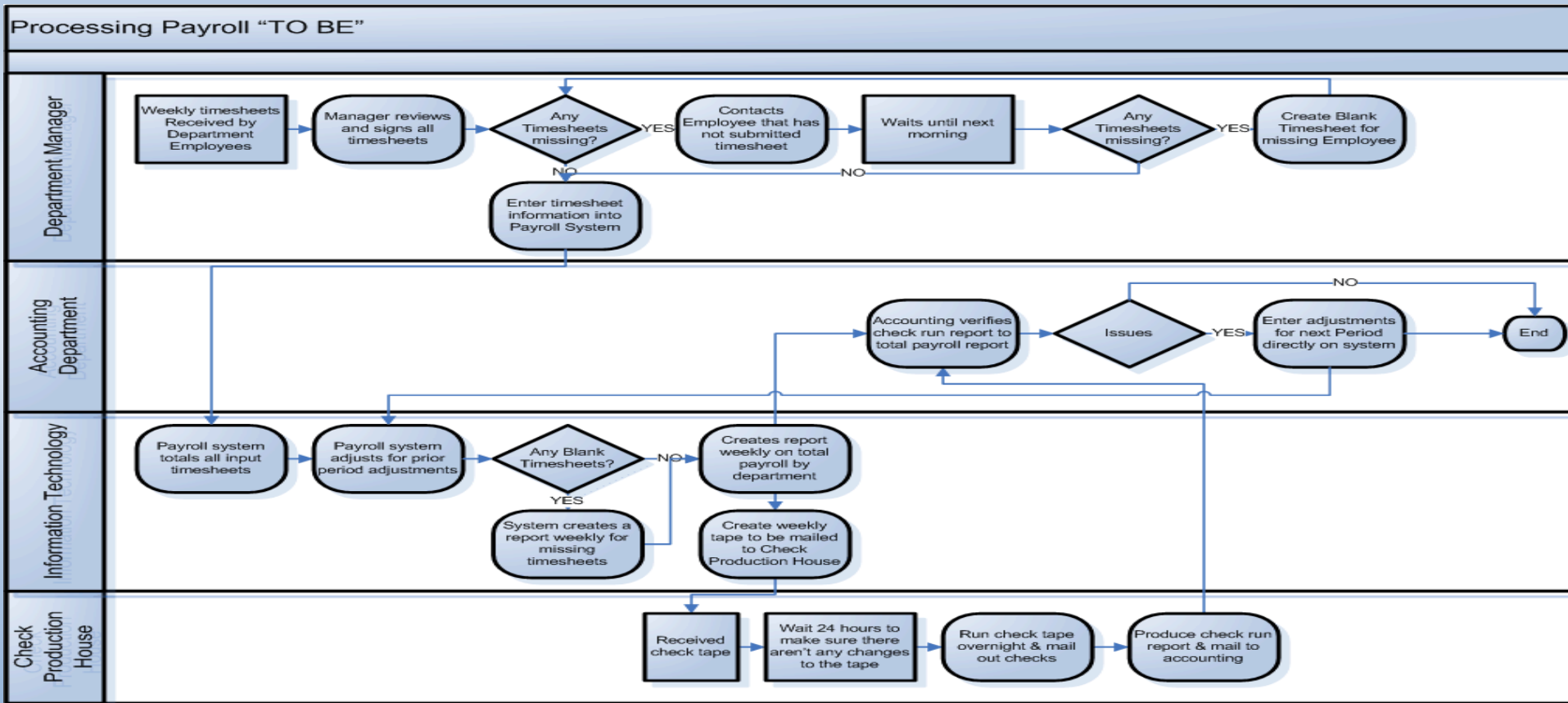


# Objectives of To-Be Process

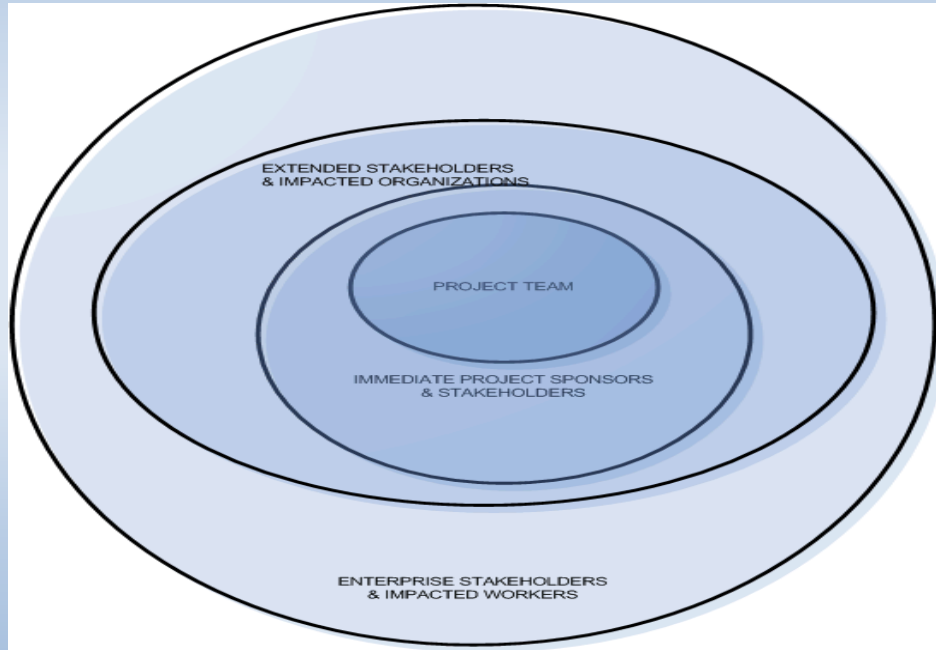
- ▶ Convert to the new process regardless of department
- ▶ Establish measures to track managerial performance against objectives



# The TO-BE Process



# The TO-BE Process



- Recommendation that best supports the business problem to be solved
- Review with an ever increasing audience to gain consensus

# Activity Cost Worksheet

Activity Cost Worksheet				
Process or SubProcess:			IS ( ) or SHOULD ( ) Analysis	
Activity	Outputs of Activity	Time/Output	Costs/Output	Problems/Decisions

# Question for YOU



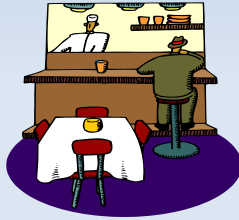
- ▶ What would be the benefit of analyzing the cost impact of every change requested?
- ▶ What is the challenge in analyzing the cost impact?

*Please submit your ideas  
through the question box*

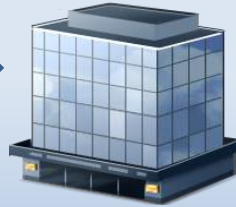
# Busy Foods, Inc. – Case Study



**Customer Needs**



**Organizational Needs**



**Project Charter**



**PROJECT**insight®  
Initiate Project Intelligence®

# 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



# Project Statement of Work

## 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

# Question for YOU



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

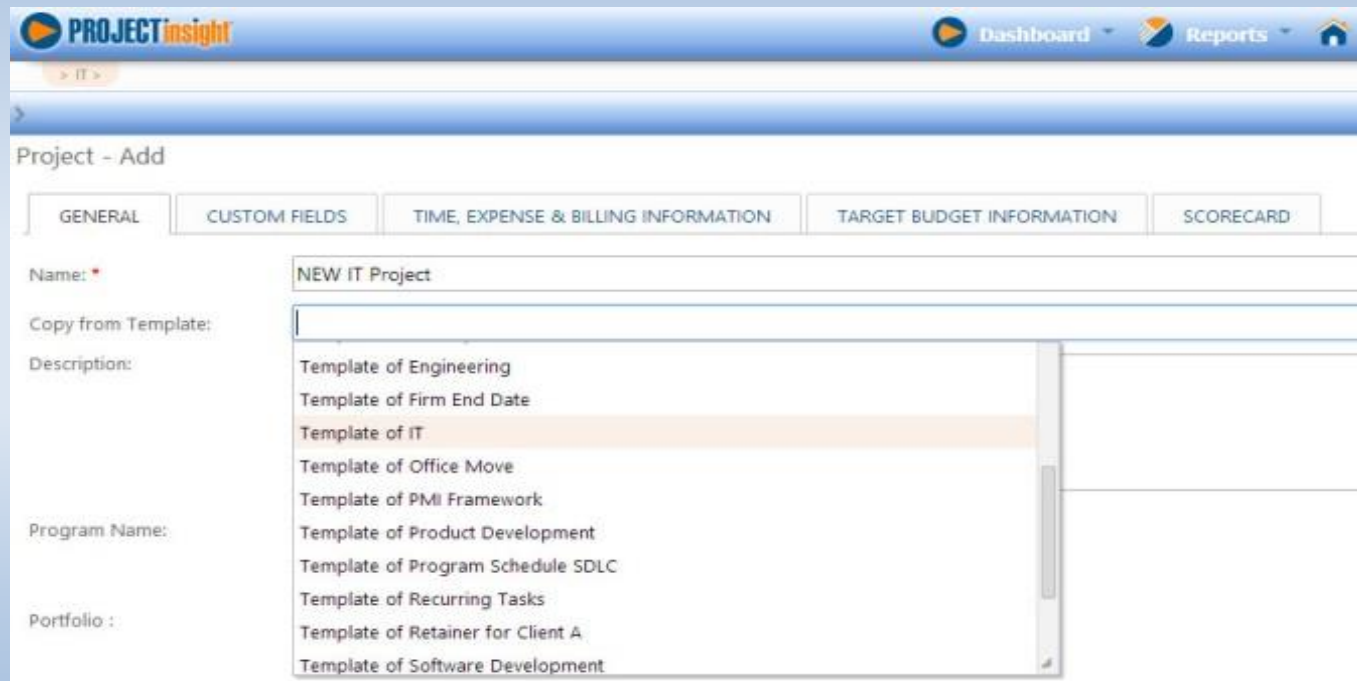
*Please submit your ideas through the question box*

# 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.**



The screenshot displays the 'PROJECTinsight' web application interface. At the top, there is a navigation bar with the logo, 'Dashboard', and 'Reports' links. Below this, a breadcrumb trail shows '> IT >'. The main section is titled 'Project - Add' and contains five tabs: 'GENERAL', 'CUSTOM FIELDS', 'TIME, EXPENSE & BILLING INFORMATION', 'TARGET BUDGET INFORMATION', and 'SCORECARD'. The 'GENERAL' tab is active. It features several input fields: 'Name:' with the value 'NEW IT Project', 'Copy from Template:', 'Description:', 'Program Name:', and 'Portfolio:'. A dropdown menu is open for the 'Copy from Template:' field, listing various project templates. The 'Template of IT' option is highlighted in orange.

Template
Template of Engineering
Template of Firm End Date
Template of IT
Template of Office Move
Template of PMi Framework
Template of Product Development
Template of Program Schedule SDLC
Template of Recurring Tasks
Template of Retainer for Client A
Template of Software Development

## ***Poll: Sample Exam Questions***

### Question

A change management plan...

### Answers

- A. Contains the procedures for scope changes
- B. Provides the product definition
- C. Provides the direction for managing the change control process
- D. Include corrective action, preventive action and defect repairs.

# 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

<https://coreperformanceconcepts.testcraft.com/assess.aspx?aid=WEBINAR-BPIPROJECTS&apass=webinar>

- ▶ 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

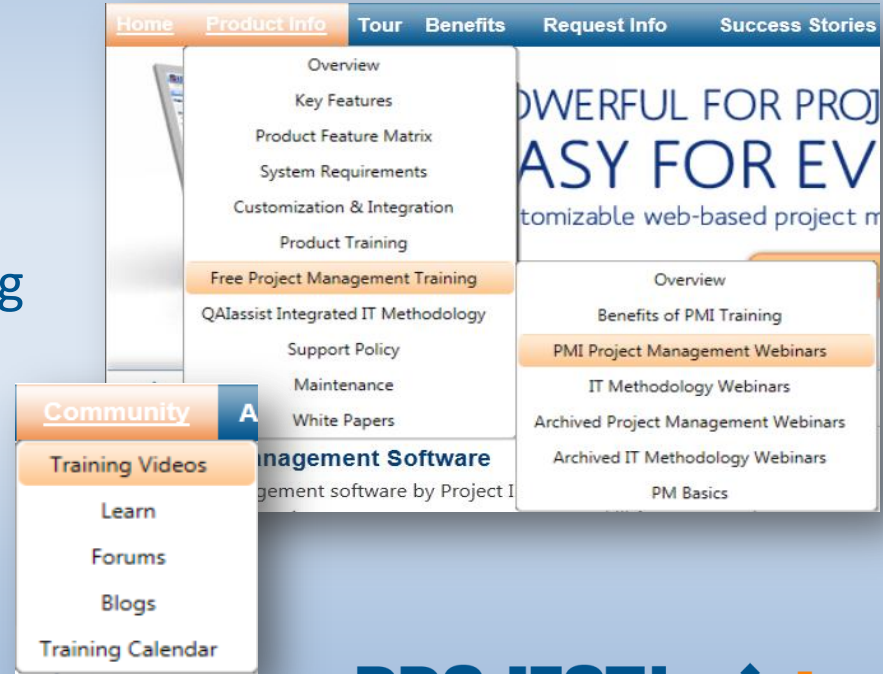
- Jan 8 – Estimating Time
- Feb 12 – Conducting Meetings with Virtual Teams (NEW!)
- Mar 12 – Estimating Cost
- April 9 – Business Process Improvement Basics (NEW!)
- May 14 – Techniques to Identify & Assess Risks
- June 11 – Earned Value Basics

## ► 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

# Register Ahead of Time

- ▶ Go to [www.projectinsight.net](http://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](mailto:Janelle.Abaoag@projectinsight.com)
- ▶ Earn 1 PDU for each webinar session attended
- ▶ To register your PDUs go to [www.pmi.org](http://www.pmi.org)
- ▶ Login as a member of PMI
- ▶ Enter the information provided on your certificate of completion
- ▶ Click continue