

First Published Effective Consulting

by Barry Tuckwood

Easy isn't it, process mapping? Anyone can tell you what their job is, and all you have to do is write it down, right? Well, maybe. Suppose you ask two people who do identical jobs and they give you entirely different answers, is it still easy? And suppose their manager has a different view of what the job is, what then? And for some peculiar reason the recipients of their efforts do not recognise the results that are claimed?

Throw into this pot the possibility that one of the people is naturally awkward, or is defensive because they think their job is being threatened, or simply doesn't like your approach how do you handle it? Suppose they know that the main agenda is to try to find all those aspects of their jobs which really can be structured to be handled by a customer services centre, lending an extra element of potential significance to any underlying suspicions the interviewee already has, the 'what happens to me afterwards?' syndrome.

Process maps provide a tool for understanding, developing and changing ways of working, and so form an essential element of business change. This story hinges on a real example from the public sector.

The public sector client began with a need for Best Value, no different in essence from the efforts of many organisations world-wide which are pursuing improvements in efficiency and effectiveness. The purpose of borough councils is to serve their customers, directly in the case of the many residents and local businesses, and indirectly in the case of the

many visitors to the area. Housing, libraries, schools, planning, street markets, playing fields, cemeteries, and dumped cars are just a few of many examples of where enquiries arise. If a large proportion of these calls could be dealt with quickly and easily by a front office, the experts in the back office could spend their time more effectively in dealing with more complex problems.

Which processes would fit into a possible customer services centre? How many processes are there altogether? Of over 200 known to exist as a result of benchmarking other boroughs which ones were actually relevant to the client? And were there any others?

Following some workshops on process mapping selected client staff embarked on research to develop a definitive list of processes, highlighting candidates for inclusion in a potential customer services centre. At the highest level they were identified only by name, and the name of the relevant manager. Candidates were readily found. Even in the complex area of benefit claims there are calls which can be dealt with speedily: forms for claimants, requirements for additional information, progress on claims.

Similarities and common processes emerged. For example, several areas of customer enquiry all require access to detailed local maps to enable the officer dealing with the case to identify the correct people or unit to pursue it: whose responsibility is removal of a dumped car, making safe a fallen tree, or

repair of a pothole? There were similarities of overall approach to various aspects, especially to the many who were making claims for benefits, or seeking housing: transmission of blank application form; completion and receipt of details; checking of information; provision of additional information; vetting of application; approval or rejection; and finally payment.

The team moved on to produce detailed maps of specific processes. The key to the first few of these was in ensuring that they could be successfully piloted, so that further processes can be included in subsequent stages. The timescale for all of this might seem generous: 6 months for the first 10 or so; two years for all of the rest; and all catering for possible inclusion of web-based facilities as part of the 'open government' initiative.

For the team, this all hinges on the use of good interview technique, an open mind, and unthreatening questioning. As processes are analysed, these are allied to some of the standard business techniques – SWOT, of course, Porter's value chain, PEST, and others. The 'decision box' is particularly useful. At many points in a process decisions are required. These are Easy or Hard on one axis, Frequent or Rare on the other, all in a neat 2x2 box. Where would a consultant be without a simple framework? To make any process efficient, decisions have to be made easier, so that everything in the Easy and Frequent quadrant can be dealt with by the front office. The more we can get into that quadrant, the more effective all of the staff will be. With time, the quadrant grows while the others shrink.



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Now we have to make it practical. All that the front office typically have is a desk-based computer and a phone. Through a series of questions and prompted answers the officer can identify the right result for the specific enquiry. For this, the person either needs to be an expert with detailed knowledge and understanding of every part of the organisation, or needs to have at their fingertips access to that knowledge.

To fit in with the decision criteria, all answers have to lead to another question; and the possible sequences of questions and answers must lead to the ultimate decision for the particular enquiry. This process of screen-based questions and automated answers, known to the software suppliers as 'scripting' is where detailed process mapping is required. While the process is in the background – unseen by the officer – questions and possible answers appear on the screen. Anyone who has ever dealt with the persistent questioning of a small child will have an idea of the detail required for the questioner to be satisfied and therefore for the screen-based customer services centre approach to succeed.

So it has to work. We have all used those automated call centre queues – and many of us have avoided them by refusing to press one for sales, two for service, three for interminable hold while awful music blasts out of the earphone - and we know the frustrations.

Not only does it have to work, but it also has to capture the enquiry so that either it can be

dealt with completely at the time, or so that the full details can be forwarded to the back office. So the process flow diagram has changed: there is more detail here than in any of the originals; more automated checking of information; more spaces for details such as contact names, postcodes, phone numbers; more room for error. In short, there are more steps all of which demand accuracy.

The target, based on rates in other sectors, is for 70% of calls to be completely dealt with by front office staff. What they need to do is identify and detail the specific processes most appropriate to their proposed customer services centre, and make sure that they can be implemented. Currently in the early stages, they expect to complete the first phase in the first quarter of 2002, and overall completion in 2003. The commitment is there. Process mapping, done effectively and in detail, holds the key.

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Useful references

The Guru Guide, Joseph Boyett & Jimmie Boyett, Wiley, ISBN 0-471-38054-7
This provides an overview of many techniques.



The Project Workout, by R Buttrick, Financial Times Prentice Hall, ISBN 0-273-64436-X
This is the book I most often recommend on project management for its practical approach.

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