

We are all project managers!

Even though “Process Mining”, “Process Discovery” and Process Automation” are becoming more and more prevalent in the media, there will always be a need to define and communicate clearly and concisely exactly how day-to-day processes need to be followed. This is essential to minimise risks, to ensure consistency, to improve performance and to ensure compliance.

The same principles apply at every level from carrying out the simplest task up to managing a major engineering project. Even if we don’t always realise it, we are all project managers! A process can be anything from “*making a decision*” through “*organising a meeting*” to “*preparing a business plan*” and “*running a business*”. It can be “*formulating and implementing a policy*” or even “*defining a process*”. A project can be a “*single instance of a process*” through “*developing a new product*” to “*running the company for the next 12 months*”.

Although some of the “standard” definitions don’t help, there are so many similarities between a **process** and a **project**. What detail do you need at the simplest level of how a day-to-day task should be carried out (“how your management system functions”) all the way up to complex projects?

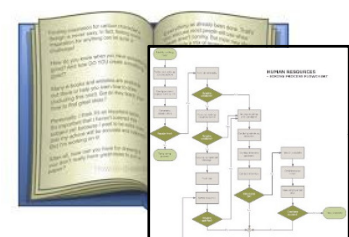
Just how much detail do you need? What should a process definition look like? Whether you are defining how work is done now with a view to i) ensuring consistency and making life easier for new starts, or ii) planning to make improvements such as introducing automation, you need to choose the best format and medium for your process definitions and supporting documentation.



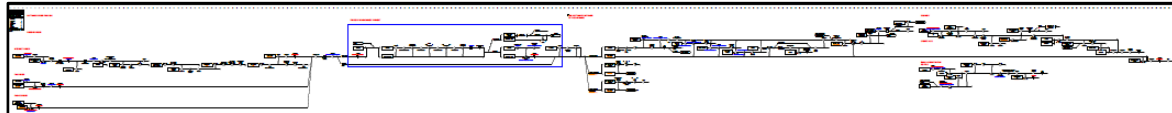
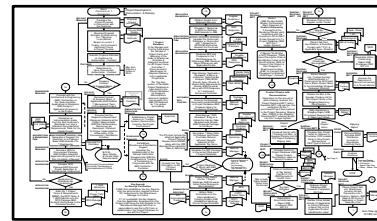
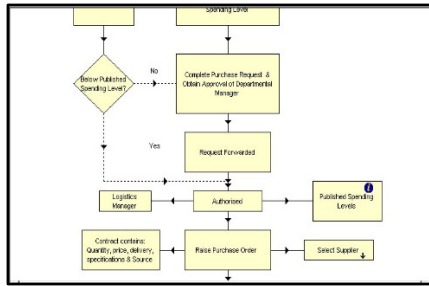
How much detail? As so often, the answer is “it depends” on...

- the competency of the people doing the work
- the leeway they have to make their own decisions given the specific circumstances they may face
- the resources (information, materials, people etc) to which they may need access
- the factors that may influence how the work is to be carried out (compliance with standards, legislation)
- the risk of “getting it wrong”.

Since the days of narrative (often long-winded) procedures, more and more software options are available with flowcharts of various styles becoming the choice of many.

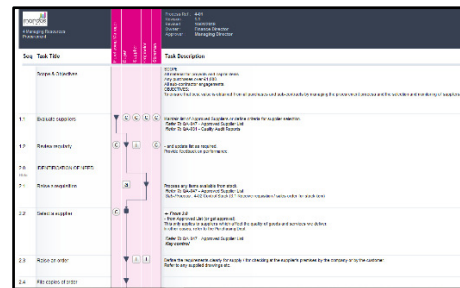


What is the best way to “get the message across”? First of all: say as little as possible, given the constraints listed above. Videos are ideal in some situations. Narrative can work, but there is always a danger that it can expand – how many old-style procedures grew arms and legs because another couple of sentences were added because something wasn’t clear? Whatever you do, be consistent – choose a clear format that lets a user see the key information easily. Software can generate flowcharts in all sorts of formats, some clearer than others:



If you decide to use a flowchart, don't get hung up on showing all the possible routes through the process as you go, or you may get tied in knots. Define the normal route first and then go back and cater for the exceptions. You can often build these into the text without having to draw more lines for the user to try to follow. But it is key to be able to access supporting documents and sub-processes at the click of a button.

Often a semi-graphical format can be the answer, to show both the process flow and the role involvements (using RACI methodology and deployment flowchart format), but also to give enough detail for a newcomer if they need more guidance on a specific task.



One of the benefits of using software which holds all the process details in a database is that the data can be cross-analysed to give a report such as Role Involvement down to task level, so that a new start can navigate through the system to see exactly where they fit in the various processes. “Words-in-boxes” Visio-style diagrams can be useful so long as the essential details of each task are readily accessible.

And you must always balance the need for precise instructions against situations where you need to person involved to be able to act on their own initiative, depending on the circumstances they face at the time. It is also key to be able to clarify exactly who needs to be consulted or informed at every stage – narrative procedures have always been less than ideal for this.

See: <https://lnkd.in/dANwVXW> on LinkedIn

#RACI #Processmapping # ISO #Compliance #Processmanagement #Flowcharting #Managementsystems #Quality #Projectmanagement



For further information on our **Author** process mapping and management system software, see www.mandosoftware.com