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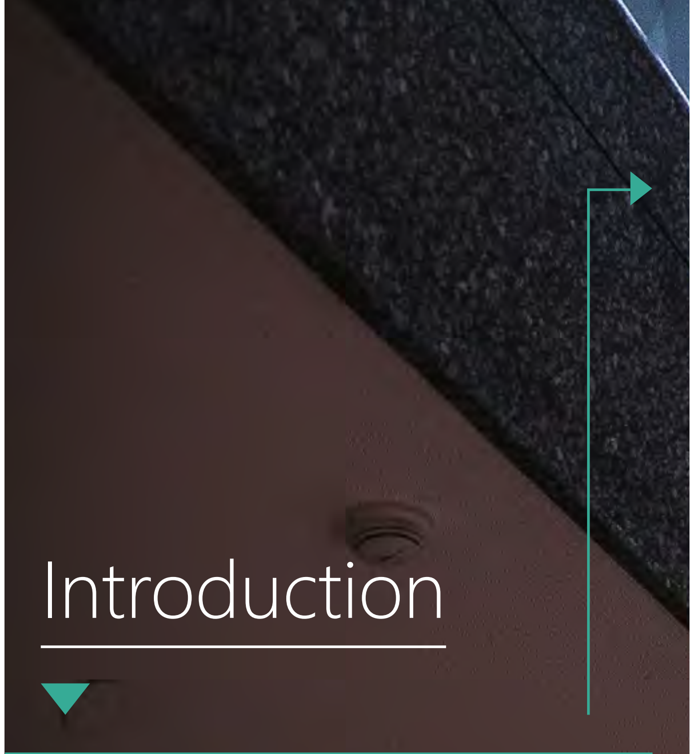
Want Better Customer Service? Simplify!

Adrian Reed



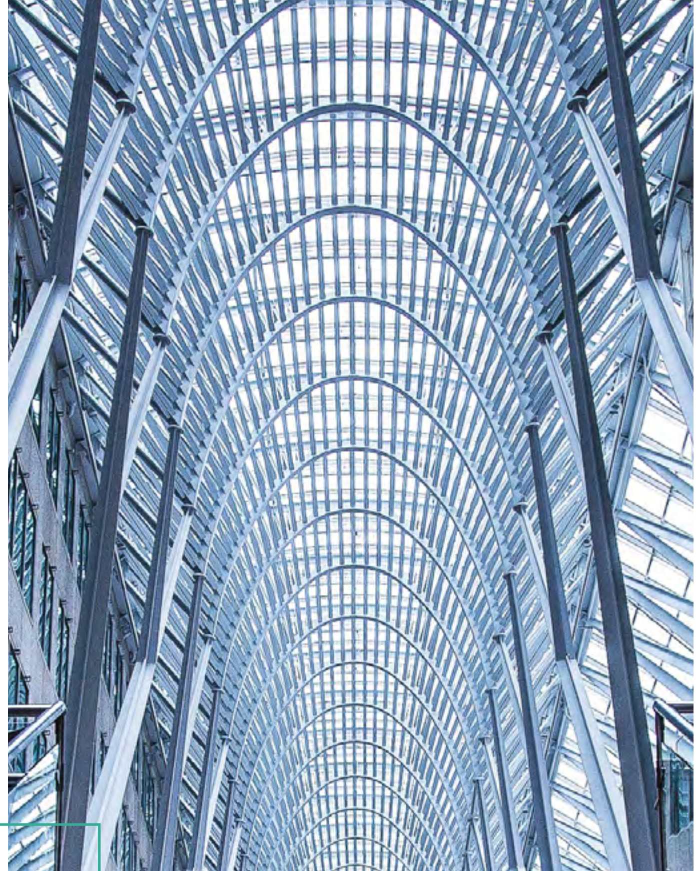
Introduction

Over time, and if left unchecked, processes have a habit of becoming more and more complicated. The business environment changes, and we might find that local teams have tactically adapted their activities to deal with different (originally un-envisaged) situations—resulting in new steps, decision logic and rules being introduced.

When an organization isn't consciously managing its processes, it may find that an unwritten rule has emerged: People are happy to add to processes but are reluctant to remove things.

For example, we might find that when new legislation and regulation is introduced, new steps or rules are added to cater for this—but we may find that no thought is put into whether to remove the now-redundant steps that related to the outdated legislation.

Over months or years, the processes grow in size and complexity. When processes become unnecessarily 'bloated', delays and bottlenecks emerge and customer service suffers. And, if we see a bloated, creaking process there is a huge opportunity



—we can examine simplification opportunities which will likely both save money and increase customer satisfaction.

The Danger of 'Process Bloat'

Process bloat is an insidious danger in our organizations. I am sure we have all seen processes that have expanded and sprawled out of control, sapping away effort and burning up resources.

Perhaps you have experienced this as a customer or recipient, or perhaps you have seen such a process within your (or a client's) organization. It is tempting to think that these processes were defined and designed badly in the first place—and whilst this may be the case—it is possibly more likely that they have got worse over time—bit by bit.

Poorly managed processes are often subject to months, years (or even decades) of incremental and uncontrolled 'tinkering'. New steps are added without fully assessing the impact on other parts of the process, the organization or its stakeholders.

For example, we might find that excessive checking is built in as a reaction to a perceived quality problem. Whilst these well-meaning interventions may have made sense in isolation, they start to look dubious when examining a process holistically; after all, dealing with perceived quality issues by introducing further inspection and checking will take time and unless there is a focus on finding the root cause then it is unlikely that the underlying quality 'issue' will ever be discovered and solved. A better way might be to find out the cause, then work to build quality in rather than try to 'inspect out' faults.

As processes start to 'bloat' we may also see inconsistencies. Since well-meaning but compartmentalized changes have been made, we might find that different members of the same team undertake the process differently.

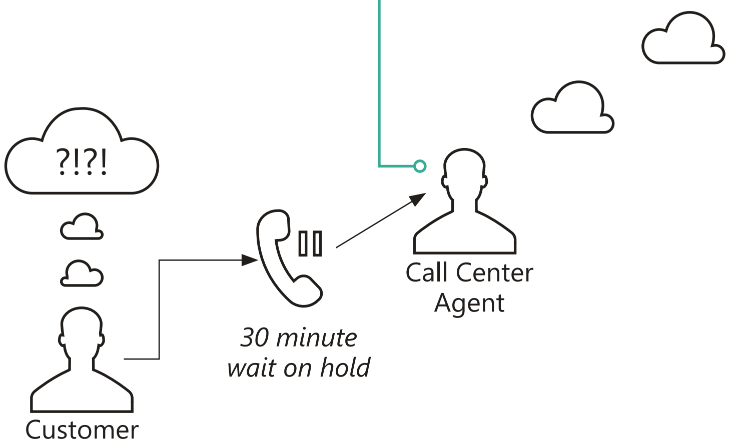
If the additional steps were never formalized or documented, how a particular individual undertakes their work may depend on who trained them. Like a legend passed down from generation to generation, the details become embellished and distorted with each re-telling.

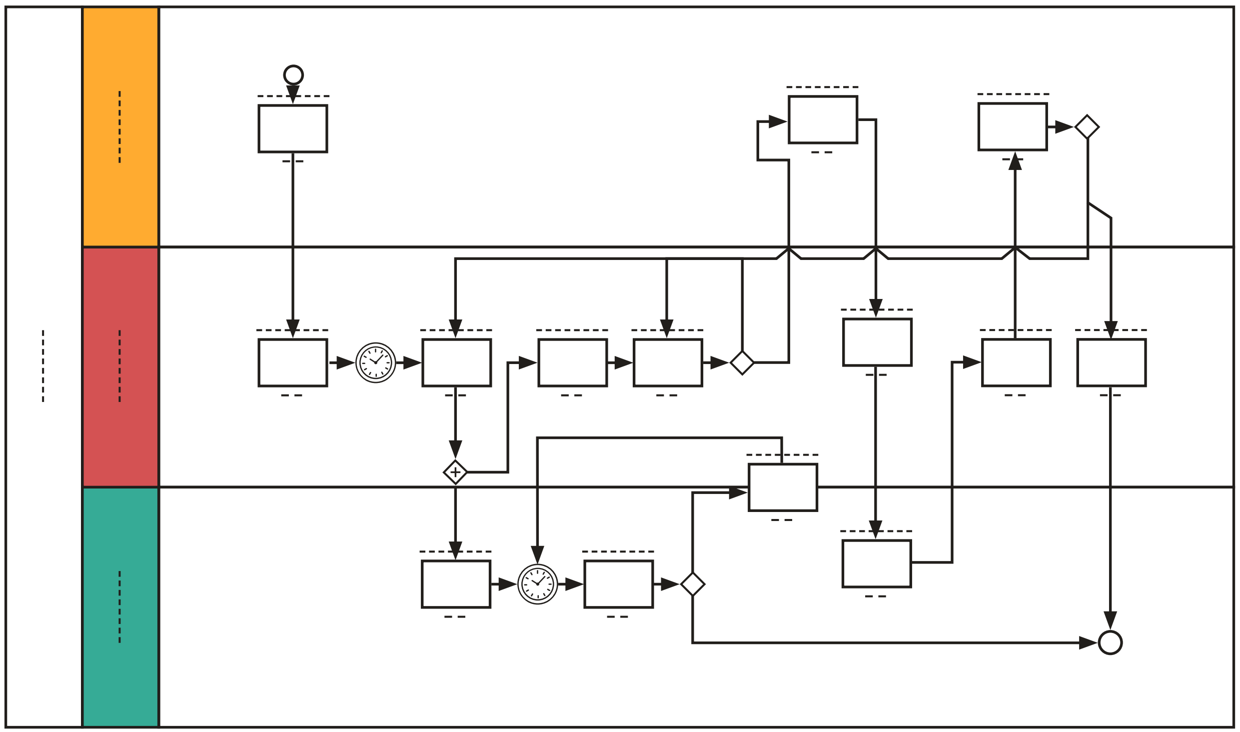
These inconsistencies can cause a plethora of issues—some individuals may look more 'productive' (on paper), but further examination may discover they are following a different interpretation or version of the process. More importantly, customers may experience inconsistency in service—particularly when different customer-facing team members have different understandings of how the process should operate.

These issues are not exclusive to bloated processes of course, but they are warning indicators prompting us to carry out further investigation. And when we investigate, we should consider whether simplification is an option. Cutting out the bloat is in everyone's interest.

Figure 1: Beware 'Process Bloat'!

No problem, we'll get that processed for you. You should receive confirmation in 6-8 weeks. If you haven't heard from us after 12 weeks, call back.





The Power of Simplification: Start with "Why"

Process simplification initiatives are not always seen as the most 'trendy' of projects. Often people get far more excited about "transformational" process improvement initiatives that are enabled by IT change.

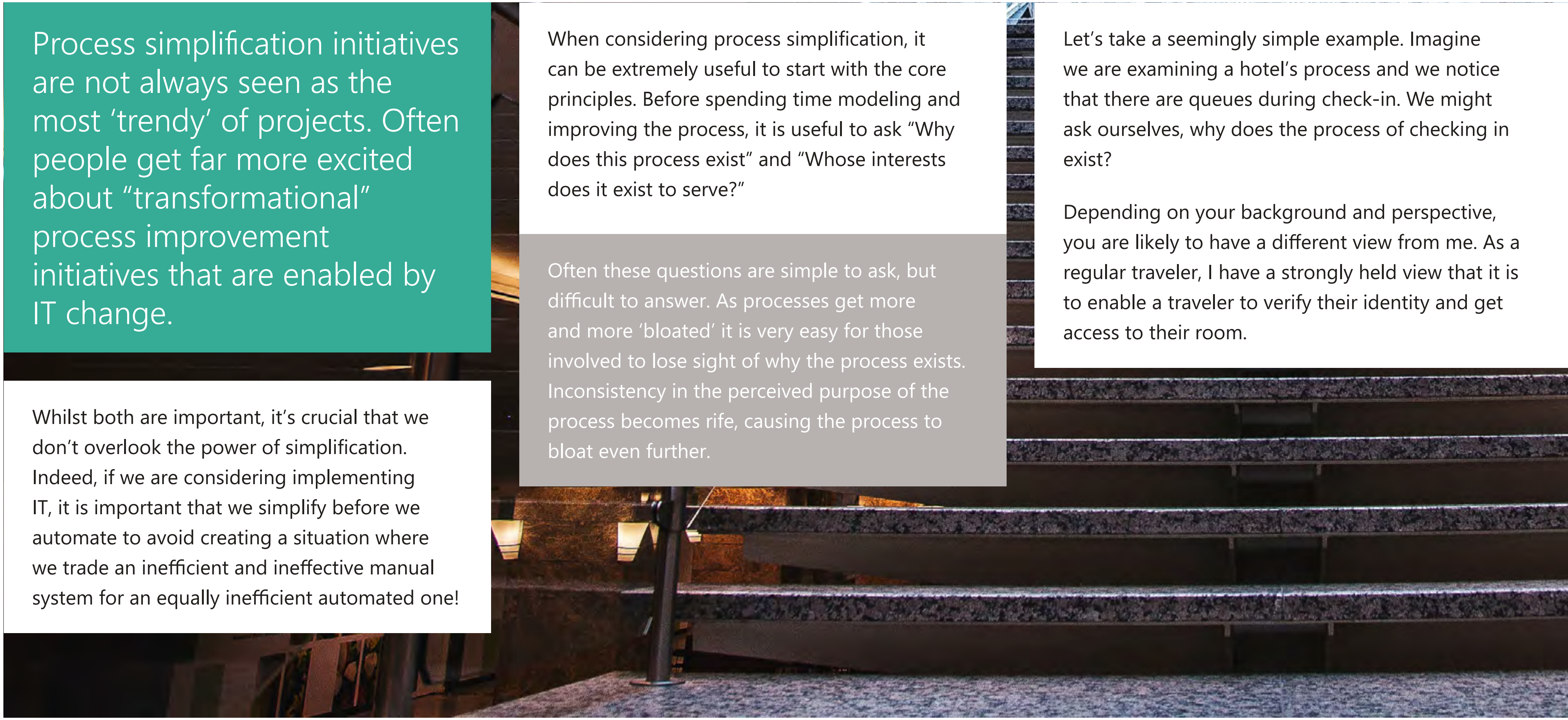
Whilst both are important, it's crucial that we don't overlook the power of simplification. Indeed, if we are considering implementing IT, it is important that we simplify before we automate to avoid creating a situation where we trade an inefficient and ineffective manual system for an equally inefficient automated one!

When considering process simplification, it can be extremely useful to start with the core principles. Before spending time modeling and improving the process, it is useful to ask "Why does this process exist" and "Whose interests does it exist to serve?"

Often these questions are simple to ask, but difficult to answer. As processes get more and more 'bloated' it is very easy for those involved to lose sight of why the process exists. Inconsistency in the perceived purpose of the process becomes rife, causing the process to bloat even further.

Let's take a seemingly simple example. Imagine we are examining a hotel's process and we notice that there are queues during check-in. We might ask ourselves, why does the process of checking in exist?

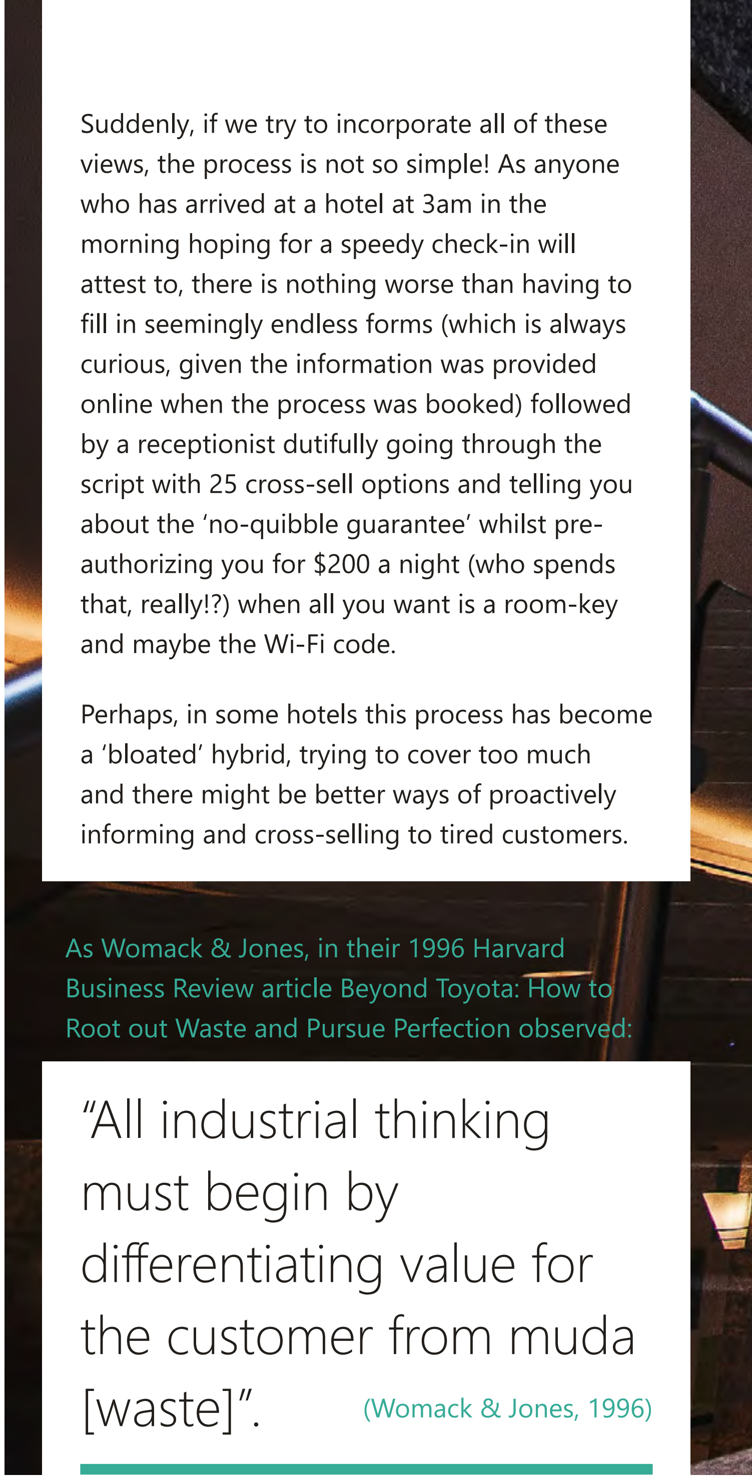
Depending on your background and perspective, you are likely to have a different view from me. As a regular traveler, I have a strongly held view that it is to enable a traveler to verify their identity and get access to their room.



Yet, as travellers around the world will attest to, many organizations have inadvertently 'bloated' out these processes.

We might find that different stakeholders have different perspectives—some complementary and some contradictory—often to the annoyance of the traveller. Take the theoretical example below, where potential inconsistencies are underlined:

Stakeholder	"Why does this process exist?"
Hotel guest	To get access to my room
Finance Manager	To protect the hotel by capturing payment details prior to providing access to the room
Hotel manager	To provide access to the guest's room, but also check the dates of their stay and capture a copy of their ID document (a legal requirement)
Restaurant manager	Primarily to ensure the guest gets to their room. Additionally, although not the primary reason for the process, it is also a great opportunity to inform them about the restaurant opening hours, breakfast etc.
Head of Marketing	To ensure the guest gets to their room, and also that we capture any missing information so we can enroll them in our loyalty scheme



Suddenly, if we try to incorporate all of these views, the process is not so simple! As anyone who has arrived at a hotel at 3am in the morning hoping for a speedy check-in will attest to, there is nothing worse than having to fill in seemingly endless forms (which is always curious, given the information was provided online when the process was booked) followed by a receptionist dutifully going through the script with 25 cross-sell options and telling you about the 'no-quibble guarantee' whilst pre-authorizing you for $200 a night (who spends that, really!?) when all you want is a room-key and maybe the Wi-Fi code.

Perhaps, in some hotels this process has become a 'bloated' hybrid, trying to cover too much and there might be better ways of proactively informing and cross-selling to tired customers.

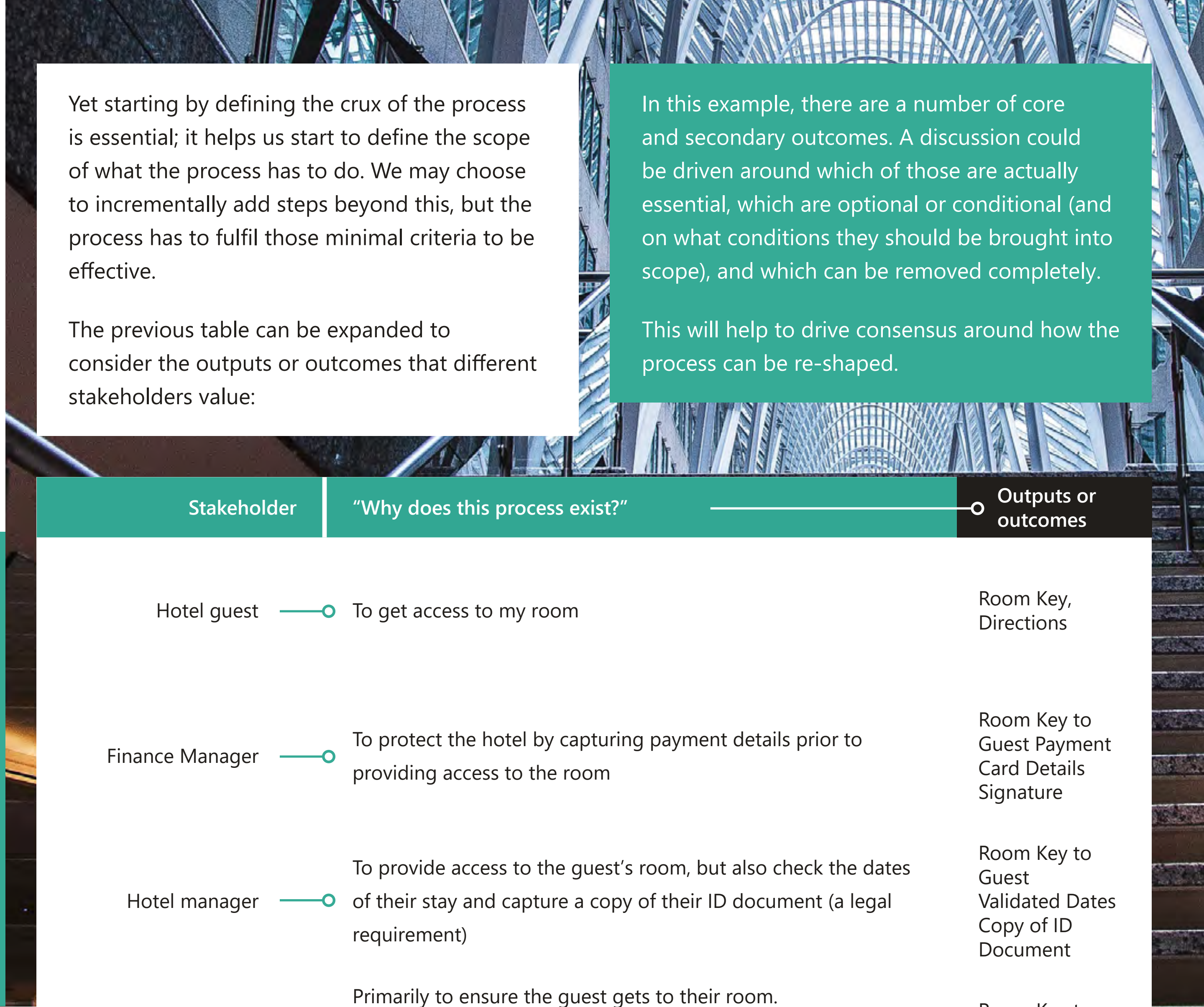
As Womack & Jones, in their 1996 Harvard Business Review article Beyond Toyota: How to Root out Waste and Pursue Perfection observed:

> "All industrial thinking must begin by differentiating value for the customer from muda [waste]". (Womack & Jones, 1996)

Outcomes or Outputs: Boiling Down to the Essence

Conversations about why processes exist tend to be extremely valuable, but they are not always initially very popular. People often start from a position of resistance. It's easy to imagine a manager resisting spending time discussing it, saying something like:

'... but this is obvious! It's a check-in process, how difficult can it be!'



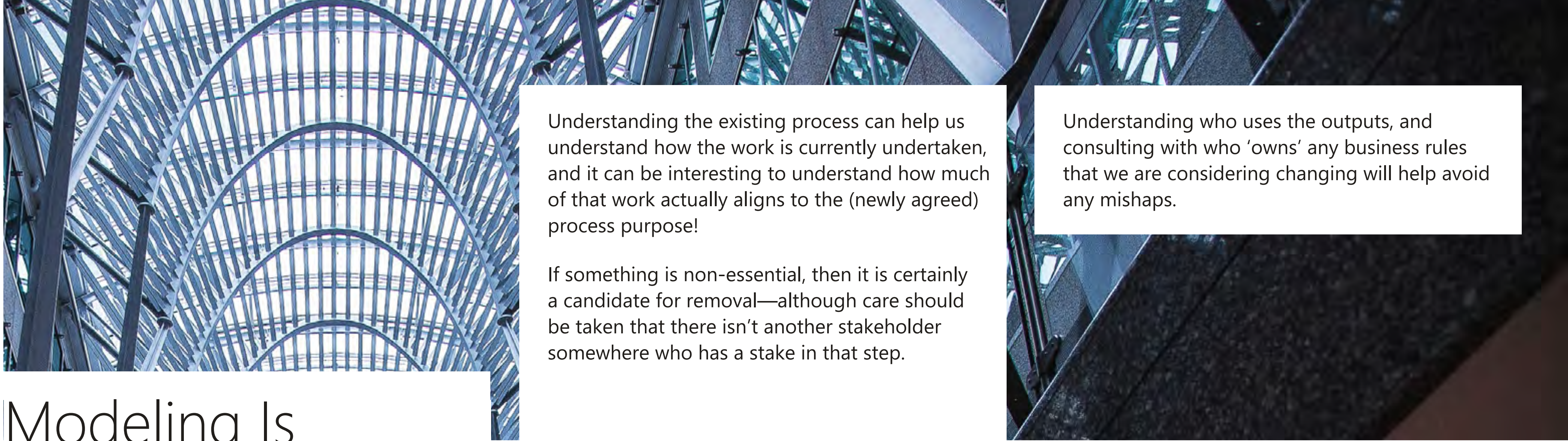
Yet starting by defining the crux of the process is essential; it helps us start to define the scope of what the process has to do. We may choose to incrementally add steps beyond this, but the process has to fulfil those minimal criteria to be effective.

The previous table can be expanded to consider the outputs or outcomes that different stakeholders value:

In this example, there are a number of core and secondary outcomes. A discussion could be driven around which of those are actually essential, which are optional or conditional (and on what conditions they should be brought into scope), and which can be removed completely.

This will help to drive consensus around how the process can be re-shaped.

Stakeholder	"Why does this process exist?"	Outputs or outcomes
Hotel guest	To get access to my room	Room Key, Directions
Finance Manager	To protect the hotel by capturing payment details prior to providing access to the room	Room Key to Guest Payment Card Details Signature
Hotel manager	To provide access to the guest's room, but also check the dates of their stay and capture a copy of their ID document (a legal requirement)	Room Key to Guest Validated Dates Copy of ID Document
Restaurant manager	Primarily to ensure the guest gets to their room. Additionally, although not the primary reason for the process, it is also a great opportunity to inform them about the restaurant opening hours, breakfast etc.	Room Key to Guest Guest informed about restaurant
Head of Marketing	To ensure the guest gets to their room, and also that we capture any missing information so we can enroll them in our loyalty scheme	Room Key to Guest Loyalty Scheme Information Updated



Understanding the existing process can help us understand how the work is currently undertaken, and it can be interesting to understand how much of that work actually aligns to the (newly agreed) process purpose!

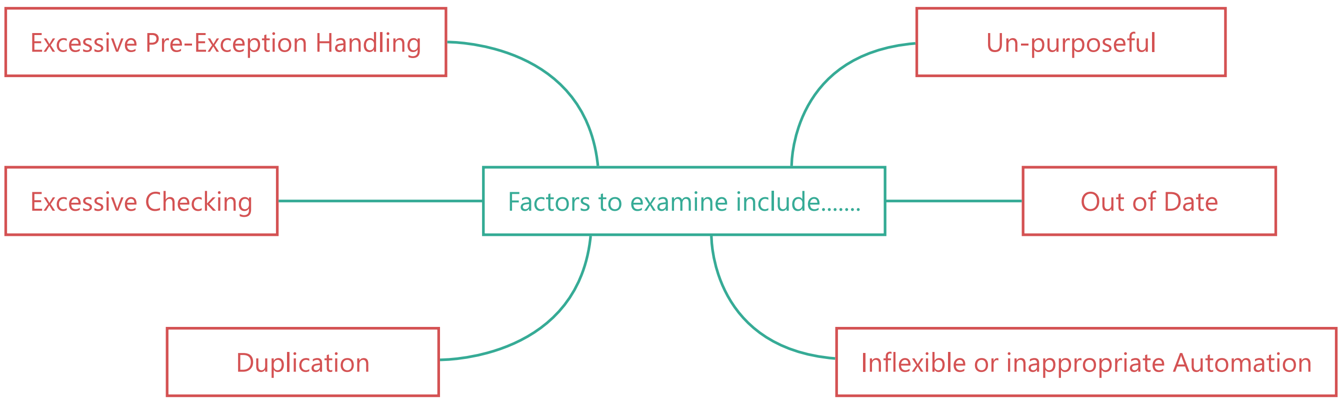
If something is non-essential, then it is certainly a candidate for removal—although care should be taken that there isn't another stakeholder somewhere who has a stake in that step.

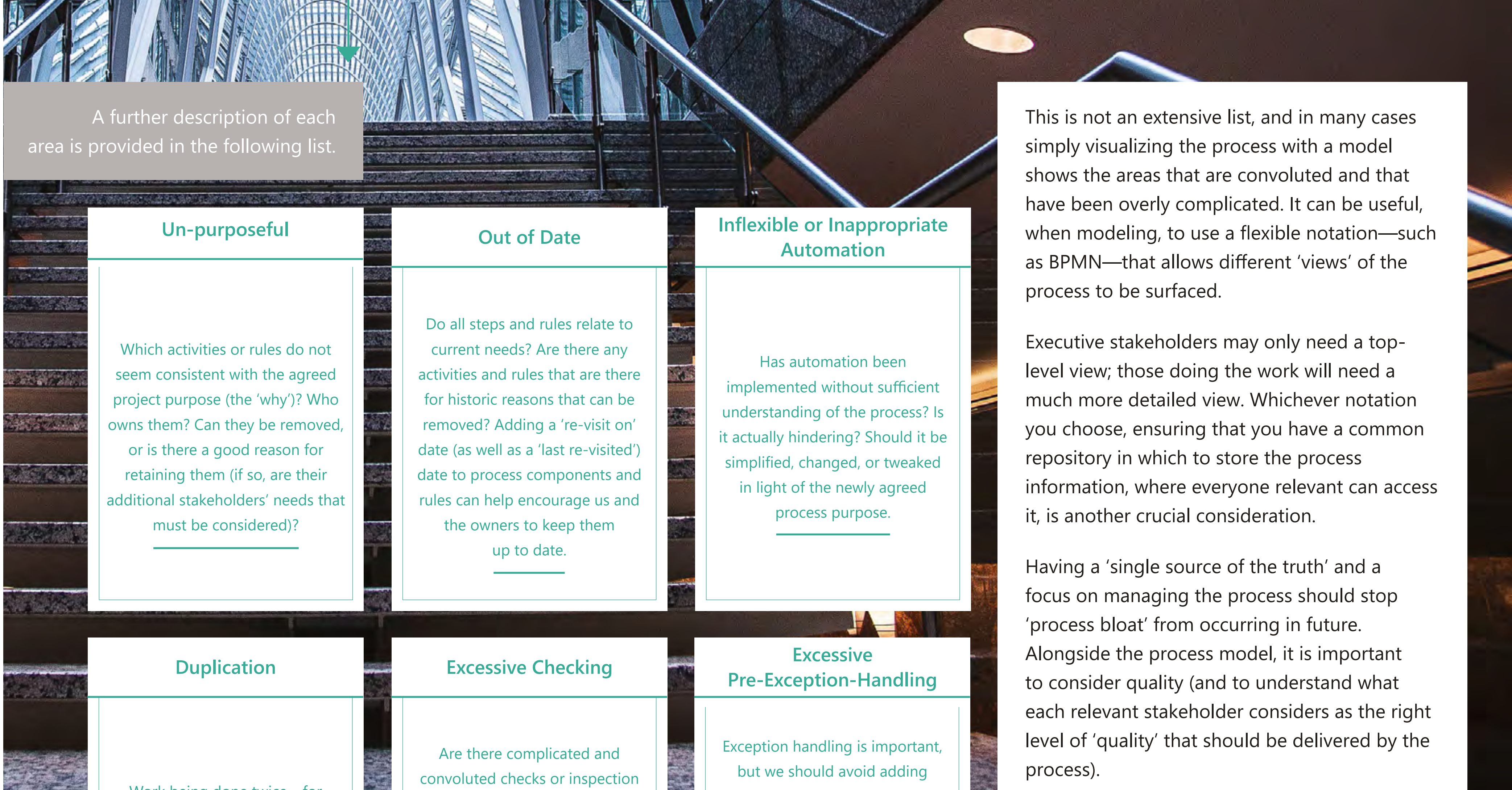
Understanding who uses the outputs, and consulting with who 'owns' any business rules that we are considering changing will help avoid any mishaps.

Modeling Is Crucial & Can Lead Toward Improvement

Having established a succinct and agreed reason why the process should exist, and also having catalogued what varying stakeholders value getting out of the process, it is useful to start modeling.

Figure 2: Bloat: Some of the factors to examine





A further description of each area is provided in the following list.

Un-purposeful

Which activities or rules do not seem consistent with the agreed project purpose (the 'why')? Who owns them? Can they be removed, or is there a good reason for retaining them (if so, are their additional stakeholders' needs that must be considered)?

Out of Date

Do all steps and rules relate to current needs? Are there any activities and rules that are there for historic reasons that can be removed? Adding a 're-visit on' date (as well as a 'last re-visited') date to process components and rules can help encourage us and the owners to keep them up to date.

Inflexible or Inappropriate Automation

Has automation been implemented without sufficient understanding of the process? Is it actually hindering? Should it be simplified, changed, or tweaked in light of the newly agreed process purpose.

Duplication

Work being done twice—for example a hotel customer filling in details when booking, and then being asked to complete the details on paper when they arrive. It would be valuable to understand why this is necessary.

Excessive Checking

Are there complicated and convoluted checks or inspection in place? For example, a hotel may have set a precedent that for a refund to be given 3 staff members sign a paper form, which is then stamped and filed. Yet, if the risk is low, perhaps a threshold could be set with smaller refunds being subject to a simpler process.

Excessive Pre-Exception-Handling

Exception handling is important, but we should avoid adding complexity to the majority to simplify the few. For example, our hotel manager may fear that some guests will try to use stolen cards. This may be true, but being suspicious of everyone—perhaps asking them to provide 3 forms of ID just in case they are a thief—is unlikely to be efficient, effective or popular!

This is not an extensive list, and in many cases simply visualizing the process with a model shows the areas that are convoluted and that have been overly complicated. It can be useful, when modeling, to use a flexible notation—such as BPMN—that allows different 'views' of the process to be surfaced.

Executive stakeholders may only need a top-level view; those doing the work will need a much more detailed view. Whichever notation you choose, ensuring that you have a common repository in which to store the process information, where everyone relevant can access it, is another crucial consideration.

Having a 'single source of the truth' and a focus on managing the process should stop 'process bloat' from occurring in future. Alongside the process model, it is important to consider quality (and to understand what each relevant stakeholder considers as the right level of 'quality' that should be delivered by the process).

We should be careful not to inadvertently hurt quality by simplifying. Done well, simplification can help increase consistency and quality—but it is something that we must be consciously watchful of.

The Beautify of Simplification: Efficiency and Effectiveness

Taking time to appropriately simplify and 'de-bloat' business processes helps us achieve a number of compelling outcomes.

Certainly, when well simplified, the processes will be more efficient—meaning either that it costs less to undertake them or resource can be allocated to other tasks (or both).

But it also means that the processes are likely to be more effective. By reflecting on the process purpose we have re-centered and re-anchored the process.

Customer satisfaction is likely to increase, whilst simultaneously leading to a reduction in cost! After all customers don't want us to do any more work than necessary—and they certainly don't like waiting.

It isn't just about simplification

Of course, simplification isn't the only approach to process improvement—and it isn't one that has to be undertaken in isolation. In fact, simplification is just one possible lens through which to consider our processes. It can be used alongside others, and there are natural areas of overlap between approaches

Conclusion

Taking a step back and focusing on simplifying processes might not always seem as exciting as other types of process initiative, but it is vital and valuable. It is also an approach that can be considered alongside (and as well as) other improvement approaches.

Understanding perspectives on why a process exists can help re-focus our attention on what is really necessary, and can help us cut out 'process bloat'. In doing so we create a slicker, quicker, better process that (done well) will save money whilst also making our customers happy.

References & Further Reading

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