eBook

What Do We Do When They Just Won't Listen?

Selling the Benefits of Process Analysis and Improvement

Adrian Reed

Introduction

Imagine the scene. You walk into the office on a typical and unexciting Monday morning. As you take your first sip of coffee and start to plan out the rest of your day, the phone rings unexpectedly. You answer it and you are greeted by the animated voice of a senior executive who you know well. After exchanging pleasantries about the weekend, the executive describes a perceived problem in their area which has been building up over time. Perhaps they have a warehouse and dispatch team that are struggling with peaks and troughs in demand (and are finding it hard to manage staffing levels). Before getting into too much detail, you hear those oh-so-fateful words:

> "I've been reading about a new software package that looks really interesting. It's all over the industry press, and it helps to forecast demand and track progress in warehouses. It'd also help us to streamline our process by automatically flagging bottlenecks. Can we get the vendor in and get them to provide a quote? I reckon this will really help our situation!"

You can feel your heart rate increase—as you sip the last drop of coffee you wonder whether it's the caffeine. Or perhaps it's the sense of deja-vu… you've been in this situation before. As a practitioner of holistic change you want to delve into the detail before prescribing a solution. You want to examine different angles of the problem situation—the process, the hand-overs, the measures and incentives, the existing IT… and you want to do this long before considering what a potential solution might be. You'll want to understand the end-to-end business process—warts and all—before proceeding. Of course, the software that the executive is suggesting might be a very appropriate solution—but there might be others that haven't been considered yet. In fact, there may be alternative solutions that don't involve IT changes at all.

Yet the urgency in the executive's voice suggests that moving quickly is imperative and non-negotiable. Their appetite for further holistic analysis and examination of business processes is likely to be limited at best—and getting a wider remit is going to be a challenge. They want to see action, and they want to see it now! You are also conscious of the hierarchy of the organization—they are senior, and of course have a right to decide and dictate action.

Yet, you fear they have not been furnished with sufficient information to make a fully informed decision. You fear that without carrying out adequate analysis up-front, and without defining the problem they are trying to solve, there is a real danger that the software won't solve the problem in the way that they anticipate. They may inadvertently accelerate into an expensive project (with ongoing licensing costs), and later find that they don't achieve the benefits that they had assumed. Perhaps they'll implement the software but will find that it causes process problems elsewhere, or that it clashes unexpectedly with core operational processes. This could potentially be an expensive (and avoidable) mistake.

As change practitioners and business process professionals, this is an area where we can provide valuable input. We can delve in and ensure that the root cause of any problem is fully understood, and assess the suitability of potential solutions. We can assess the impact of each solution from a wide range of angles, including process impact, human factors, technological integration and many, many more. But what do we do when the heat is on, the accelerator is down, and there is limited appetite for analysis? We will explore some tips in this white paper.

Communicating the Case for Analysis

The types of business process analysis and problem analysis activity we are discussing fall within the wider discipline of business analysis, which IIBA (International Institute of Business Analysis)'s BABOK® defines as:

"The practice of enabling change in the context of an enterprise by defining needs and recommending solutions that deliver value to stakeholders." (IIBA, 2015)

Yet whilst this definition is extremely useful, it is worth reflecting on why analysis of the existing situation is useful and beneficial. As alluded to in the introduction, analyzing the status quo (our "as is") enables us to ensure that we are understanding the nuances of any underlying issue and that we examine the situation from a number of complementary angles. Yet the challenge is communicating this need. Put differently: It is crucial that we convince our stakeholders that this is a valuable activity. It is crucial that we sell the benefits to them.

Arguably, there is an element of sales in our jobs – and if we can 'sell' the benefits of holistic analysis well, we will likely gain a wider remit!


Innovation
Branding
Solution
Marketing
Analysis
Ideas
Success
Management

An important first question: “Are we all trying to solve the same problem here?”

If we were faced with the situation outlined in the introduction, an important first step would be to identify our key stakeholders, and then understand their core needs (and the problems they are trying to solve). This involves asking questions such as “what does solving this problem mean for them?” “Are they perceiving the problem in the same way, or in a different way?” Often a quick conversation with two executives who appear to be in agreement can uncover that they are pursuing similar, but subtly different goals—and uncovering this is a way of us gaining engagement and creating a conversation. Building on the example mentioned above, if we were to speak to the Head of Operations and the Head of Sales & Service we might find that they tell us the following:

> Head of Operations: “The core problem we are trying to solve here is the difficulty we have managing staffing in the warehouse—we need a way of predicting (or levelling) demand. This will help ensure that we ship all of our parcels on time, and reduce the number of complaints.”

> Head of Sales & Service: “The core problem we are trying to solve here is the reliability of shipping—parcels aren’t always shipped on time. This involves ensuring the warehouse is operating successfully, so that we can offer a better customer experience and that we deliver the right parcel, first time, on time, every time. It will increase our reputation and allow us to ramp up sales activity (so we can increase sales).”

Whilst these two views on a problem look very similar, there are nuanced differences. The Head of Sales & Service is interested in customer experience and is aiming for increased sales, whereas the Head of Operations is interested in managing demand and reducing complaints. These perspectives on the problem are almost certainly compatible, but a solution that meets the needs for one stakeholder might not meet the needs of all. The changes that we make to processes and broader systems are influenced by the problem that we are trying to solve, therefore it is important to scope out and ensure there is clear agreement before progressing. This may well affect the very processes that we look to analyze, enhance or change. If we consider these two viewpoints on the problem as a Venn diagram, we might approximate the situation to be as shown in figure 1:

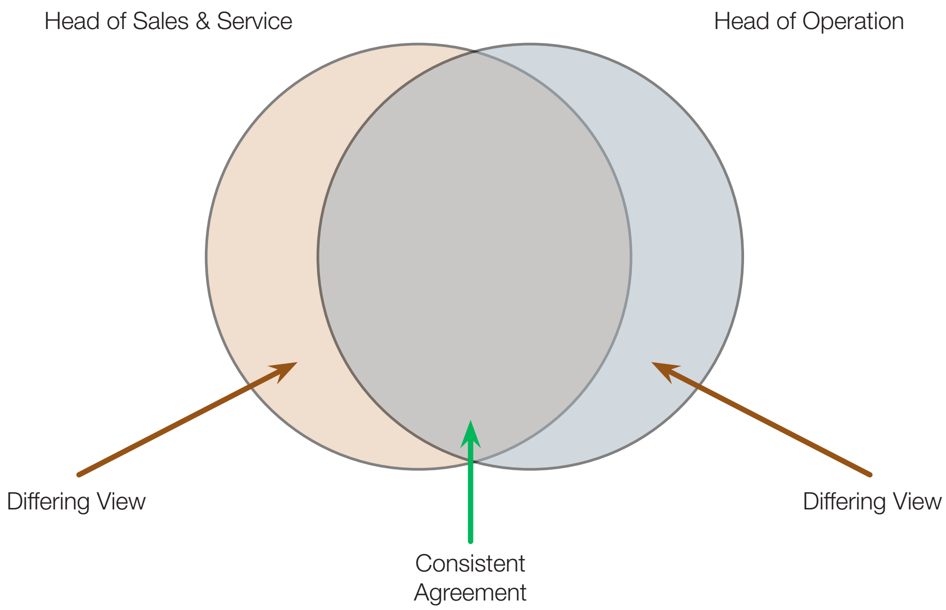


Figure 1: Near agreement, with some differing views. Although there is similarity, it is key to reconcile the differences around the edges.

In fact, when we are in a situation where it's necessary to sell the benefits of analysis, it can be very useful to start by briefly meeting with the key stakeholders and understanding the outcomes they are trying to attain and their perception of the problem. If there are different perceptions—however subtle—this often creates a conversation. Our stakeholders realize that they are shooting for different goals—and if this isn't nailed down, we are likely to have problems further downstream. It is a conversation starter, and a chance for us to prove our worth by bringing the relevant parties together and gaining consensus – perhaps by defining an agreed problem statement. It also helps us understand what they are trying to achieve, so we can determine how to articulate and frame our analysis activities in a way that will be most useful and meaningful for them.

Once there is agreement on the high-level problem that is being solved, and the benefits and outcomes that are being sought, a valuable later step is to confirm this scope by specifying which processes and IT systems are candidates for adaptation or changing (or indeed, which new processes or systems need to be implemented to fill a gap). Having worked with the stakeholders to attain consensus, we are well positioned to take this logical next step.

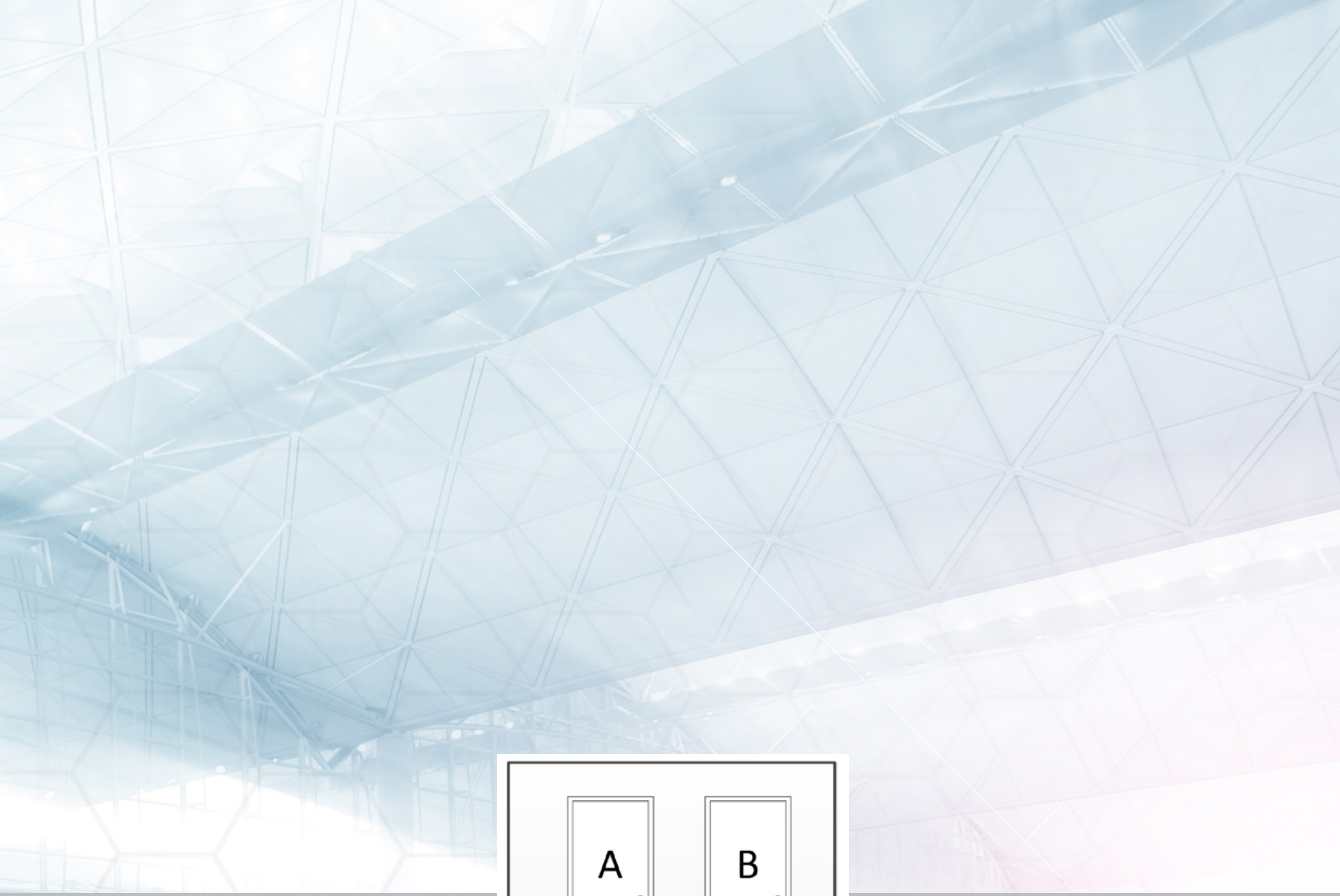
The Value of Overcoming WYSIAII

In his fascinating book “Thinking Fast, Thinking Slow”, which covers a range of pitfalls in decision making, Daniel Kahneman refers to a pattern that happens in decision making that he refers to as What You See Is All There Is or WYSIATI (Kahneman, 2012). Broadly, this refers to the natural decision makers for us to decide based on the information we can see; therefore a stakeholder who has identified a potential (in our example IT based) solution may be weighing up two options:

a) Do Nothing

b) Implement IT solution

In this case, they may quite rationally go for option (B) as it alleviates at least some pain. Yet we can help broaden out their options, perhaps offering them an option c, d, e… and so on. By examining the problem in detail and understanding quirks with the as-is process, we can help generate a range of potential solution options, arming our decision makers with the pros and cons of each. This involves helping our stakeholders to take a step back, so that they see a more holistic view of the situation, the process and the underlying problems, as metaphorically illustrated in figures (3) and (4) below:



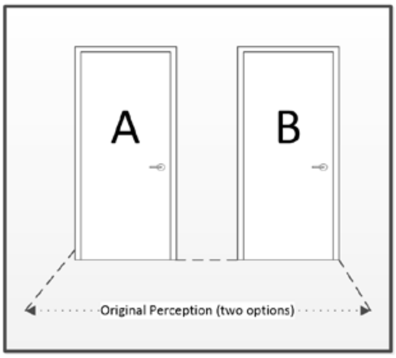


Figure 2: A stakeholder's original perception on a situation may be narrow due to "WYSIATI", in this diagram the available options are shown (metaphorically) as 'doors'

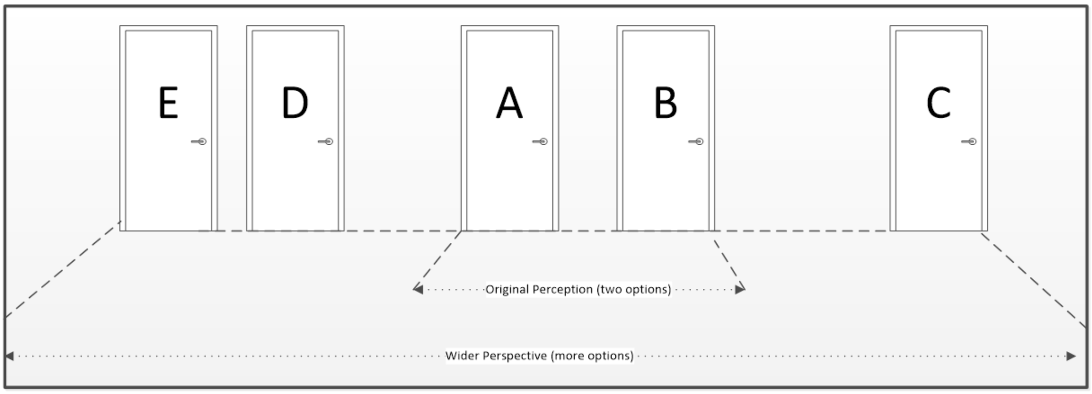


Figure 3: Helping our stakeholders take a step back can help illuminate further options

Having knowledge of WYSIATI, and explaining to our stakeholders that with some contained analysis effort up front we can help expand their options and ensure they have all the information to make an informed decision can be compelling. Explaining that we can help assure that the right option is selected and can 'de-risk' projects is itself a powerful and compelling selling point.

Overcoming Objections: It Doesnt Need to be Time Consuming

Having gained consensus on the problem, we may still find that people are reluctant to dedicate further time to process analysis and other types of analysis. There is a perception, understandably, that carrying out up-front analysis of a business situation and relevant underlying processes can be time consuming. Particularly if no existing documented process models exist. Yet this is often a misconception—the reality is, when implementing change it is necessary to consider these factors at some point. Imagine, extending on the example above, that we went out and procured an automated solution—before implementing that solution and releasing it to the business users, we'd need to know how it impacted their existing processes. We'd need to consider the impact on staffing, roles, other systems and processes. Yet, making the solution decision before undertaking the analysis limits our options early—having signed a contract with a solution or technology provider we are committed to a certain level of spend. If we subsequently find that the solution doesn't meet our needs, or legislation or regulation prevents us from adapting our processes to fit with the 'out of the box' functionality, then we are in trouble. We will probably find it's necessary to implement workarounds—literally working around the very system that we implemented (rather than working with it). These types of workarounds can be time consuming at best, and at worst may completely negate the benefits of doing the project in the first place.

To draw an analogy, if an electrician was tasked with finding a fault in a high-current and high-voltage circuit, they would probably need to refer to (or create) a schematic diagram first—simply 'tinkering' may create short circuits or all sorts of other undesired outcomes. So it is better to get this schematic earlier, and use it to diagnose the source of the problem. We can then target our effort effectively, and ensure that we resolve the underlying root cause.

Carrying out this work up-front, prior to a solution decision being made de-risks the project, enables us to provide the project sponsor with certainty and helps us to ensure that our organization is progressing with the right solution, for the right reasons and that the relevant costs, benefits, risks and impacts are fully understood. It is useful for us to distil and communicate this message to our key stakeholders, and show them that we are helping them to accelerate with confidence. Our goal is never to unnecessarily slow down or prevent progress. We aim to do just enough analysis.

Selling other benefits of documented processes

Additionally, it is useful to mention and 'sell' other benefits of the analysis we plan to undertake. When investigating a business problem in detail, it is likely that we will create a set of business process models (or, one business process model with multiple views). These will help us to diagnose issues, spot bottlenecks and handovers, and look for a whole range of opportunities for streamlining. Whilst we may create these models to support a change initiative, there is significant benefit in keeping them available and updated beyond the project itself. This is probably intuitive to everybody reading this article, but a business sponsor may not be aware that having even a partial set of processes documented can help. Some of the benefits include those listed below:

- *Training:* Clear process models and task/activity descriptions help to ensure that training is carried out consistently, and the 'to be' artefacts that we produce may well be welcomed by operational teams who will use them for inducting new employees.

- *Clear boundaries:* Process models help us to ensure there is a clear view of who does what and when.

- *Continuous Improvement:* Creating a centrally accessible set of process models that are clearly 'owned' can help enhance continuous improvement activities. The teams themselves can experiment with incremental changes, and bring the models up to date, carefully highlighting the experiments that have worked (and those that haven't).

- *Monitoring:* With clearly defined processes, it is easier to regularly monitor progress and efficiency. If problems arise, we can look across the process for the source. We save time in our future as we have an agreed and documented model to work from.

- *Well positioned for future change:* Importantly, if there need to be future changes to the process, organizational structure, technology applications, data used and so on, we have a head start. With a set of documented process models we can consider the impact of any changes, and if problems arise we can work with our stakeholders to pinpoint them. Organizations that are embracing agility will be interested in having clearly documented business processes. This will enable them to quickly assess and respond to environmental changes.

Ensuring that business process models are stored in a common repository, in a shared notation (such as BPMN) will help ensure that the right people can benefit and use the right information when needed.

Credibility Comes Through Delivery

Finally, it is important to note that whilst the tips proposed in this white paper will help us to get a foot-in-the-door, and will help us gain traction with our stakeholders—they are no substitute for delivery. It is important that we focus on carrying out just enough analysis, and that we do not get caught in a loop of analysis paralysis. We will ultimately be judged, as a team, by the effectiveness and usefulness of our deliverables and the change we deliver. As hall-of-fame speaker Patricia Fripp wisely states:

“The real sale comes after the sale” (Fripp,n.d.)

Or, as we say more colloquially in the UK, “the proof of the pudding is in the eating!”

Conclusion

Up front analysis of our business and our processes will help us to ensure that we have clear consensus on the problem that we are trying to solve with any given initiative. A little time up front will help us understand and compare multiple solutions (rather than falling into the WYSIATI trap), and will help us ensure our executive stakeholders have access to the best quality information to make their decisions. However, getting the remit to carry out this work can be tricky, so clearly articulating the benefits is key. Showing the benefits, and showing that it needn't be time consuming will help us get a foot in the door. Over time this will enable us to build rapport and we will reach a position where early engagement of this type is seen as essential, rather than optional.

References & Further Reading

References:

Advice on Improving Sales. (n.d.). [online] Patricia Fripp.
Available at: www.fripp.com/advice-on-improving-sales/ [Accessed 7 Mar. 2016].

IIBA (2015). A guide to the Business analysis body of knowledge (BABOK guide) v3. Toronto: International Institute of Business Analysis.

Kahneman, D., (2012). Thinking, Fast and Slow. Penguin: London

Further Reading:

Readers interested in the topics raised in this paper may find the following resources useful:

Cadle, J., Paul, D. and Turner, P. (2014). Business Analysis Techniques. Swindon: BCS Learning & Development Limited.

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[Accessed 7 Mar. 2016].

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Adrian Reed is a Consulting Lead Business Analyst who is passionate about the analysis profession. He is Principal Consultant and Director at Blackmetric Business Solutions (www.blackmetric.co.uk), where he provides business analysis consultancy and training solutions to a range of clients in varying industries. He is also a director of the UK chapter of the International Institute of Business Analysis (IIBA). Adrian is a true advocate of the analysis profession, and is constantly looking for ways of promoting the value that good analysis can bring.

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