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Evans White Paper: Process Modeling in Practice

Evans Incorporated
October 2007

CONSULTING FOR **EVOLVING** ORGANIZATIONS

Process Modeling in Practice – Maximize Value

Here you'll learn about:

- The importance of visualizing business processes
- Using models to align strategy and plan change
- Practical approaches for developing models
- Successfully implementing these models in your organization

About Evans Incorporated

Our Mission Statement...

We help organizations consistently achieve greater levels of success through the execution of programs that improve, innovate and evolve the way you work.

Executive summary

This paper identifies some practical ways you can leverage process models to improve your business. Irrespective of the modeling tool you prefer – be it pencil and paper, Visio, a BPM suite, or some different modeling platform – this paper will describe how you can approach, develop, and re-use your models, how you can leverage that work on a variety of organizational levels, and how to apply these techniques across all kinds of business problems.

The business challenge

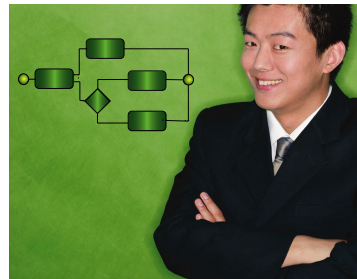
Successful businesses understand the value of analyzing complex problems or information technology programs in the context of processes. In principle, a process-based understanding provides a:

- foundation for retaining knowledge of existing operational procedures
- framework for aligning strategy, operations, and technology
- common language for depicting organizational operations
- platform for planning and analyzing the impact of organizational change

Foundation for retaining knowledge

The utility of process models begins with documenting the current state. While “as-is” processes may be ill-defined and not well understood, moving too quickly into defining the “to-be” alternatives may overlook some of what is currently working well.

Projects involving change benefit from understanding how the current environment is working. This understanding informs communication and deployment planning. Even, in the absence of change, documenting the as-is can help improve the corporate knowledge base, (train new staff,) and define job descriptions.



Aligning strategy, operations, and technology

Organizations need a way to model, scope, and analyze their capital IT programs against a broad organizational context to understand how both internal and external stakeholders, products, and services are affected. Evans believes that process analysis serves to help meet this need. Process models provide a valuable visual tool to help change engagements align IT investments with operational strategies. This alignment results from an analytical approach that breaks the organization down to its constituent parts (processes, people, technology, and strategy) and subsequently facilitates an aggregate review of the impacted components. Understanding both the micro and macro view of the

organization enhances decision making behind management investment in technology and process improvements. This helps create a more efficient, effective, and energized environment.

Articulating a common language

Process models offer a way to communicate with different constituents and establish a common understanding. As a visualization tool, these models help project leaders clearly articulate *how* the work will be enhanced, changed, or redesigned. This visualization can be re-used across stakeholder groups, allowing each to more clearly see how their day-to-day work will change. Higher level diagrams are useful for communicating these same changes, at a summary level, to management.

Planning and analyzing impact of change

Many projects suffer from stakeholder conflicts, vague requirements, and insufficient management support. Grounding the project design phase in process analysis can help clarify scope and requirements to enable stronger management buy-in. Process models improve the project planning phase by illuminating where changes to technology, policies, or resource levels impact operations throughout of the organization. This kind of comprehensive impact analysis improves project

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planning which, in turn, improves the probability of successful project implementation.

Understanding the market need

Market research reveals that a troubling number of projects fail to deliver the expected business value, and even fewer continue to yield the expected returns over time. In basic terms, the change does not “stick” as expected. Some of the most common reasons given for these failures include lack of buy-in, weak management support, poor communication, and an inability to influence changes in the way people work. Process models can help, and the next section shows why.

Solution: Understanding modeling approaches

Process modeling is more than placing boxes on a single “page” to illustrate how a particular activity (procurement, hiring, accounting, etc.) operates. Process modeling involves a structured approach to decomposing functions, modeling processes within those functions, and administering this information according to agreed-upon principles and standards. A *function* is any high-level purpose or responsibility assigned to the accountability agenda of an organization, whereas a *process* is the unique combination of individual work elements that produce one or more products (or services) to achieve one or more desired

outcomes. Identifying or documenting functions typically begins with looking at organizational charters, mandates, strategic plans, or comparable data. Processes, then, can flow both within a single function or across multiple functions (depending on the nature and complexity of the flow). The scope of the project dictates how and to what extent the functions are decomposed. Smaller, more strategic projects may not benefit from such an exercise because they are typically self-contained within a single function. The role of function and process diagrams follows as listed below.

Function diagrams

- create a blueprint of primary lines of business - “buckets” of what the organization does
- analyze scope within or across functions
- communicate big-picture impacts to stakeholders

Process diagrams

- document work practices—performers, owners, and producers
- outline a high-level overview and then drill into details
- may support simulations to analyze resource changes, bottlenecks, or reengineering strategies

Implementing for success

Getting value out of your process models relies on the following factors:

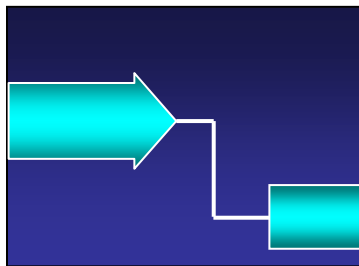
- define project scope within a process context to help secure

stakeholder buy-in to the project approach

- relate processes to roles and organizational units to analyze how changes impact people and departments – those who perform the process and those who own it
- be flexible in your approach - know how to both *drill into the details* and *analyze flows that cross different functions (which may entail segmenting flows into meaningful components)*
- repurpose your models to create an analytical repository by relating risks, controls, issues, or other attributes to your diagram
- deep-dive with data models to see how systems, networks, and information flow through the organization
- *for enterprise models* – focus on governance, ownership, standards, and plan for the future to get the most out of your investment

Need help?

Helping organizations model process, develop enterprise process architectures, and plan process improvements is a core Evans competency. Evans’ process analysis experience with all ranges of clients, organizational cultures, and leadership uniquely positions our firm to help address your problems. Evans additional services such as IT Lifecycle Management, Strategy, Human Factors and Change Management augment our process modeling skills so as to offer clients a holistic methodology to take your organizations to the next level of performance.



“We believe that achieving optimal performance in your organization requires a conscious consideration of the human factor. It's true whether you're developing your business strategy, executing reengineered business processes, upgrading your technology, or making changes to your human capital. Our consultants are committed to helping your organization reach the next level of performance through our unique human-centered approach to change management and process reengineering. It's how we help you energize your organization.” - Susan M. Evans, Ph.D - President