Holistic Process Design
A system of process, people, tools, and data

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Practice

Research

Education

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Learning outcomes:

- Understand the problems when process is designed within silos
- Understand how people, process, tools, and data contribute to holistic design
- Ability to describe a university process as an end-to-end set of activities
- Develop a set of tools for constructing end-to-end processes
Do these symptoms look familiar?

- I am unclear on responsibility, authority, and escalation paths
- Users complain that we don’t have documentation, but we’ve made tons of it
- We found our workflow was missing critical steps and key stakeholders
- There is miscommunication and frustration between groups
- Handoffs between groups are not working well
- So much wasted time and rework
- We have a lack of standardization
- Oh, that’s just how we’ve always done it.
- The new IT system is just a prettier version of the same functionality
- We have to do it that way because of policy.
- Users complain that we don’t have documentation, but we’ve made tons of it
- We found our workflow was missing critical steps and key stakeholders
- I am unclear on responsibility, authority, and escalation paths
- Users complain that we don’t have documentation, but we’ve made tons of it
Process innovation exists to avoid those issues and facilitate **successful** IT system **implementation**

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<tbody>
<tr>
<td><strong>1</strong></td>
<td>Allows IT to innovate, not just digitize</td>
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<td><strong>2</strong></td>
<td>Stops past mistakes from being repeated</td>
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<td><strong>3</strong></td>
<td>Improves collaboration and communication between groups</td>
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<td><strong>4</strong></td>
<td>Promotes customer-centric service design</td>
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<td><strong>5</strong></td>
<td>Creates continuous improvement</td>
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IT systems fail to meet their potential due to poor business process design.

Technology is not the solution to your business processes, it is the manifestation of your processes.
What is a **business process**?

Create knowledge (grants acquisition and management)

Acquiring new capabilities (hiring)

Acquire goods and services (procurement)

Obtain a new student (admissions)

Educate a student (teaching and assessment process)

Facilitate communications (WiFi deployment)
Processes exist along two dimensions:

The **horizontal** end-to-end

Create and deliver some value
For example...
And the second dimension

- **Process**: Workflow, policies, etc...
- **People**: Motivation, training, skills, etc...
- **Tools**: IT systems, machinery, space, etc...
- **Data**: Integration, definition, business modeling, etc...

Recruit & Admit a Student

The *vertical* top-to-bottom
This is the **holistic** view of process
Business process are difficult to design

- Know all stakeholders
- Balance diverse stakeholders
- Operate in an ever-changing environment
- See beyond your own perspective
- Integrate process, people, tools, and data across a value chain
Our value proposition leverages existing strengths
Our perspective

Holistic, End-to-End, Outside Perspective
Using a well-defined **methodology**

<table>
<thead>
<tr>
<th>Define Process</th>
<th>Validate Process</th>
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<tr>
<td>Scope Project</td>
<td>Research Background Information</td>
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<tr>
<th>Discover Process</th>
<th>Gather Data</th>
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<tr>
<td>Develop Process Summary</td>
<td>Initial Analysis and Themes</td>
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<tr>
<th>Assess Process</th>
<th>Synthesize &amp; Analyze Data</th>
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<td>Develop Assessment Models</td>
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<th>Validate Process</th>
<th>Finalize Process Models</th>
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<td>Develop Solutions</td>
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<th>Deliver &amp; Close-Out Project</th>
<th>Conduct Briefing</th>
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<tr>
<td>Prioritize Next Steps</td>
<td>Project Close-Out</td>
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Using a well-defined methodology, the process includes defining, discovering, assessing, validating, and delivering the project.
And a growing library of **tools**
And our philosophy

While we value...

...we place greater value in

1. Numbers
2. Models
3. Presenting Recommendations
4. Talking to SME
5. Optimizing Individual Procedures
6. Technology

People, Processes & Tools
How Organizations Interact with Models
Assisting in Journey/Change Management
Engaging All Stakeholders
Optimizing Global Processes
How Tech Facilitates
This makes change happen!

1. Create urgency

2. Form a powerful coalition

3. Create a vision for change

4. Communicate the vision

5. Empower action

6. Create quick wins

7. Build on the change

8. Make it stick

Implementing & sustaining for change

Creating the climate for change

Engaging & enabling the organisation
This makes change happen!

1. Create urgency
   - Better ideas

2. Form a powerful coalition
   - Improved inter-organizational communication

3. Create a vision for change
   - Engaging & enabling the organisation
   - Common perspective and empathy

4. Communicate the vision
   - Improved inter-organizational communication
   - Creates a higher level of engagement (lowers ‘resistance’)

5. Empower action
   - Leverages multiple enablers
   - Sense of collaboration

6. Create quick wins
   - Gets more people involved

7. Build on the change
   - Bottom-up urgency

8. Make it stick
   - Brings out the elephant in the room

Implementing & sustaining for change
Have had impressive results

- 24 Large projects
- 233 Staff directly involved
- 84% of Clients return
- 80% of Clients implemented change
- $100,000s in identified savings

- 7 Published papers
- White papers, best practices, and guides

- 11 Conference talks
- 154 Employees trained
- 186 Students taught

A whole lot of good will
We have learned a lot (since 2016)

1. Don’t be scared of the elephant in the room
2. It is the journey, not the destination
3. You can never talk to enough people
4. There are bad clients
5. Leverage your position at a university
6. Build and define a concept model
7. This practice takes time to develop


