



BLOCK & TACKLE

Leveraging Process *for* Results

APQC'S 2012 Process Conference & Training
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The Houstonian Hotel, Club & Spa - Houston, Texas

APQC®



Establishing a BPM Culture

Dave Correia/ October 25th, 2012

Hewlett-Packard

Topics covered will include:

- **Components of a BPM culture**
- **Process Portfolio**
- **Process Design to Deployment Framework**
- **Measures and metrics**
- **Governance**



“Culture”

the attitudes and behavior that are characteristic of a particular social group or organization

Merriam-Webster dictionary



Advance a commitment to quality, continual improvement and skill development

Leadership

- Transformation starts at the top

Customer Focus

- Putting the customers first in everything we do

People

- Investment in knowledge and skill building



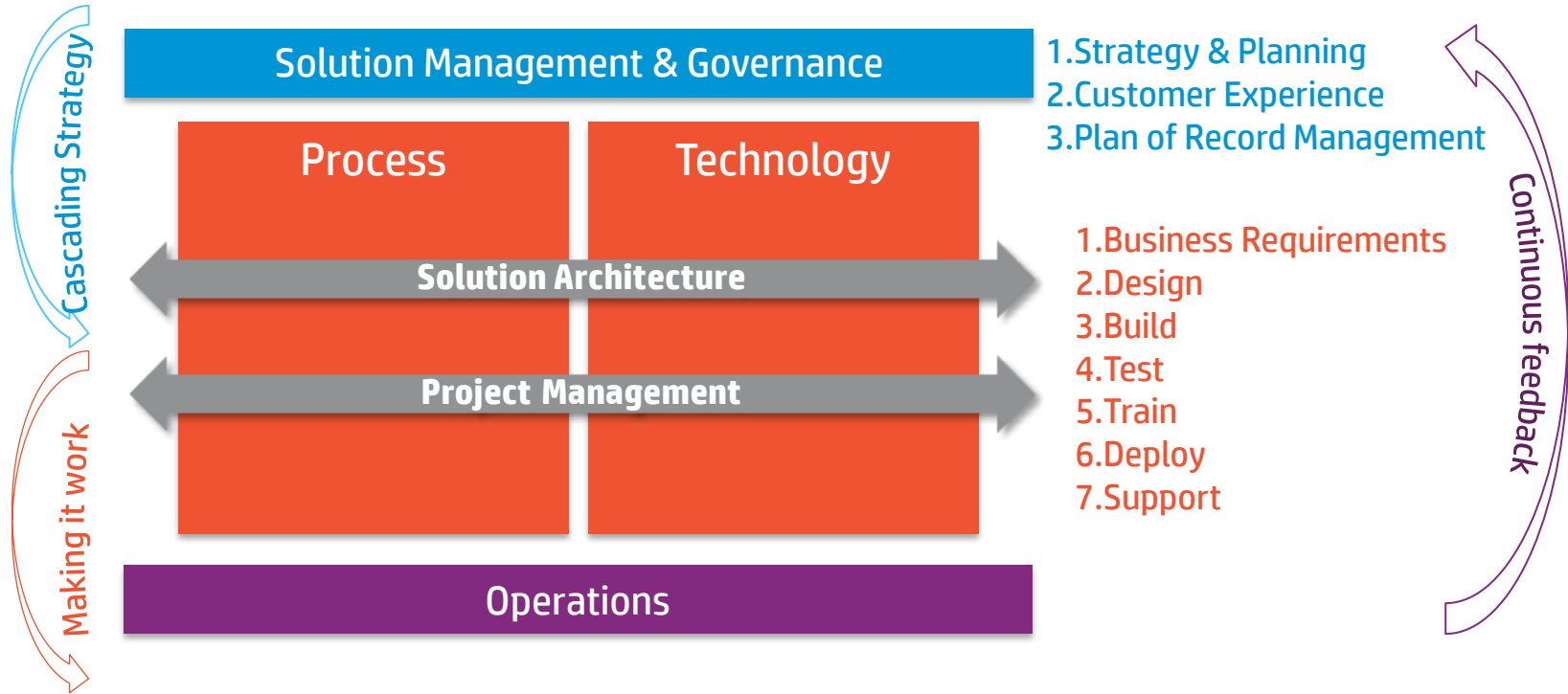
Attracting, developing, and retaining world-class employees

Business Process
Management

Lean Six Sigma

Program &
Project
Management

Operating Model



Process Portfolio



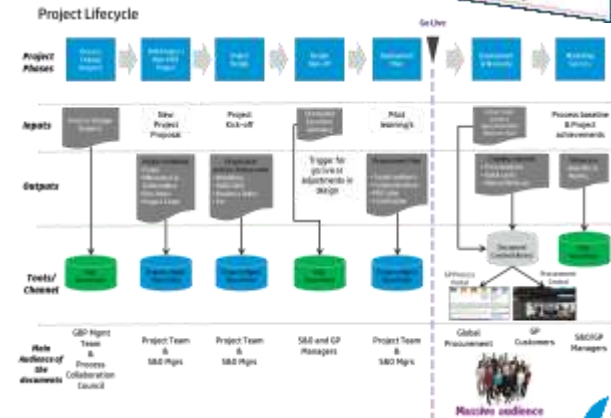
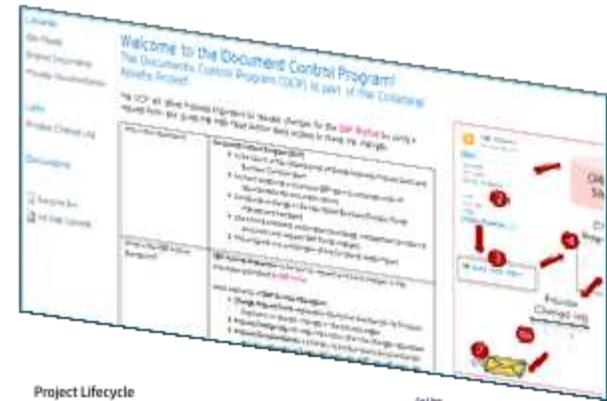
The Process Portfolio Aligned to APQC



Document Control Library

Attributes & Benefits of Document Control Library

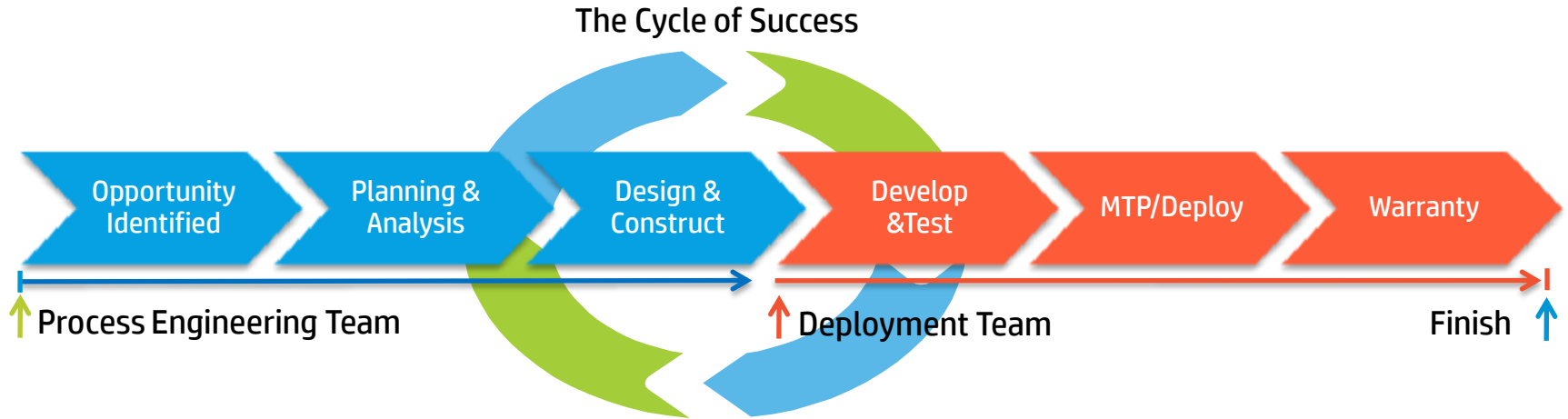
- Documentation change management
- Single repository for Source Files
- Records management capabilities, document retention, and version control to support corporate audits
- Tracks:
 - Requestor and Document Owners
 - Approvals through Checkpoint Reviews
 - Date and reason for change



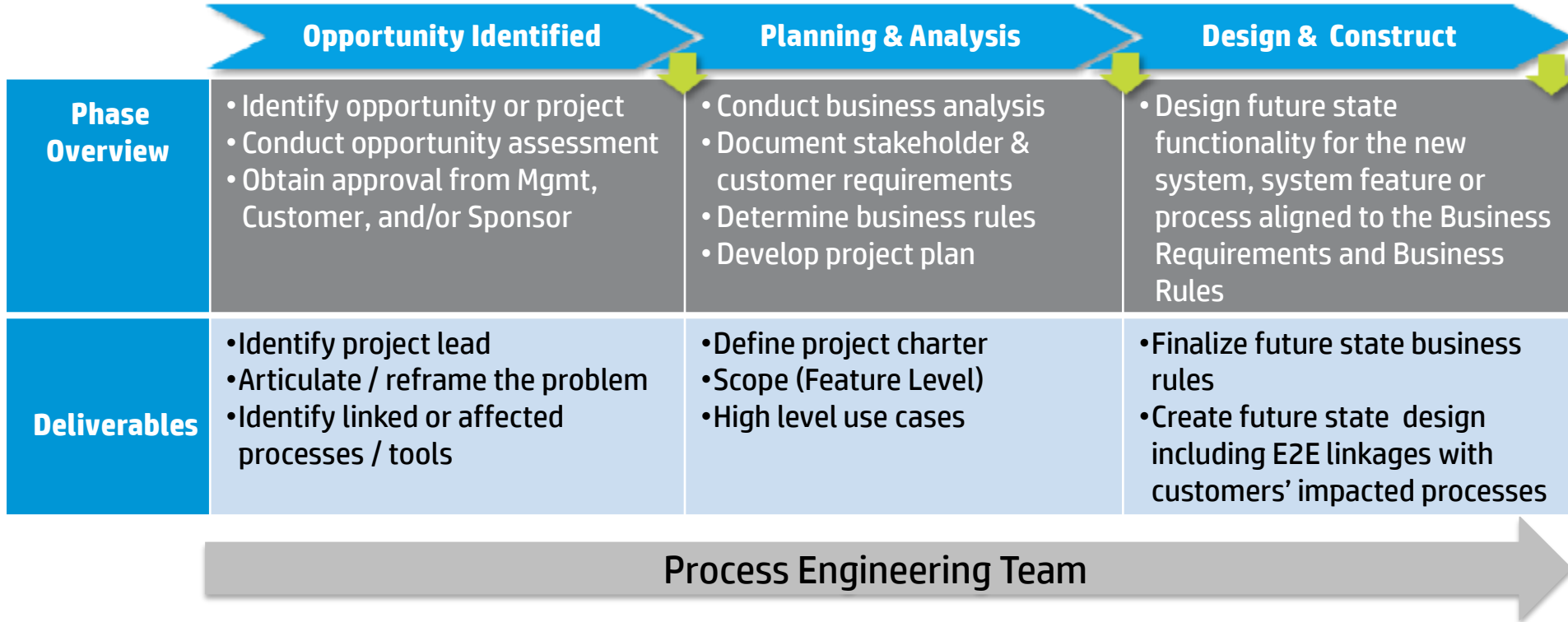
Process Design to Deployment Framework



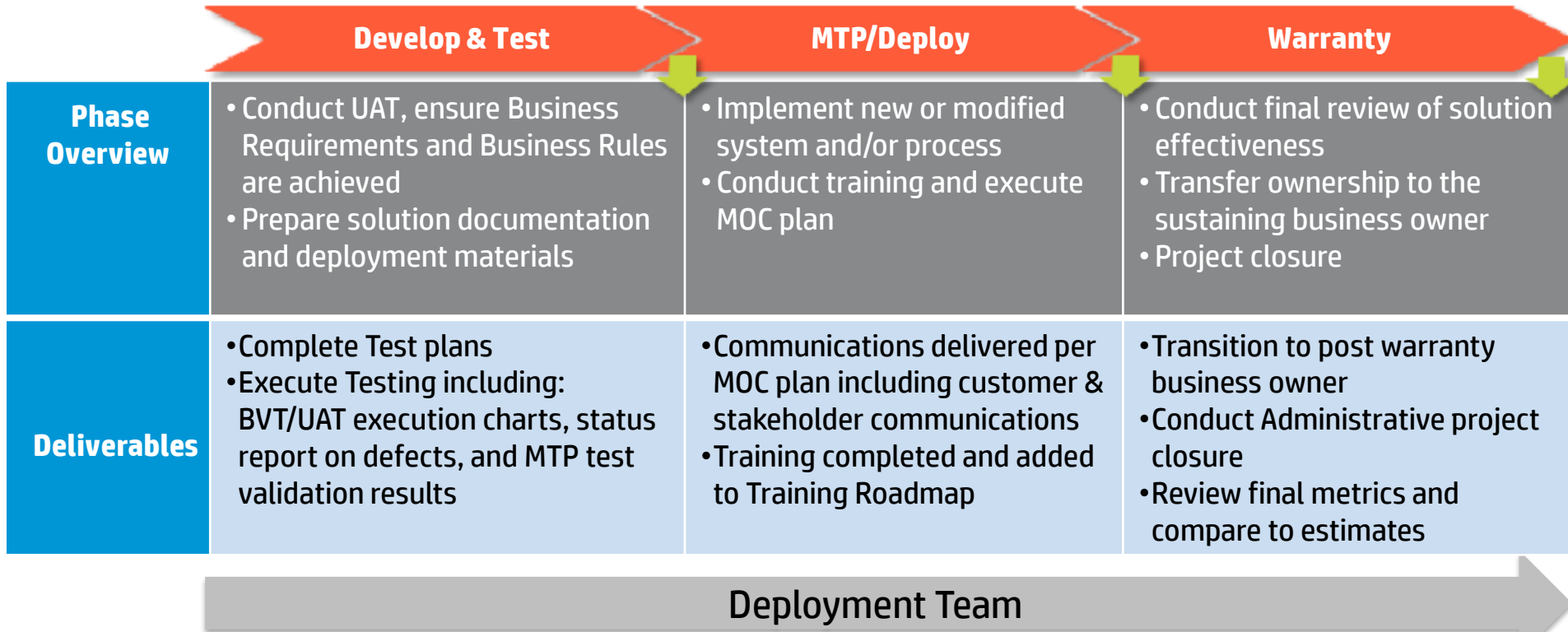
Design to Deployment Framework



Design to Deployment Framework



Design to Deployment Framework



	Opportunity Identified	Planning & Analysis	Design & Construct	Develop & Test	MTP / Deploy	Warranty
Phase Overview	<ul style="list-style-type: none"> Identify opportunity or project Conduct Opportunity Assessment Obtain approval from Mgmt, Customer, and/or Sponsor 	<ul style="list-style-type: none"> Conduct business analysis Document stakeholder & customer Business Requirements Determine Business Rules Develop Project Plan 	<ul style="list-style-type: none"> Design future state functionality for the new system, system feature or process aligned to the Business Requirements and Business Rules 	<ul style="list-style-type: none"> Conduct UAT, ensure Business Requirements and Business Rules are achieved Prepare solution documentation and deployment materials 	<ul style="list-style-type: none"> Implement new or modified system and/or process Conduct training and execute MOC plan 	<ul style="list-style-type: none"> Conduct final review of solution effectiveness Transfer ownership to the sustaining business owner Project closure
Deliverables	<ul style="list-style-type: none"> Identify project lead Articulate / Reframe the problem Identify linked or affected processes / tools Document and assess proposed benefits Calculate Project ROI Identify GP impacted organizations, Sponsors & Solution Approvers Identify Customers impacted and Customer approvers Determine solution business owner Clearly define R&R of each project team member and Sponsors (owner of client engagement critical) Establish Project Governance Structure CBA ePDS Go/No go decisions 	<ul style="list-style-type: none"> Define Project Charter Scope (Feature Level) High Level Use Cases Identify project interdependencies Define timeline for development and testing including: test strategy, master test plan, QA modules, etc. Create Project plan Update Design to Deploy Roadmap Document Business Rules Develop Business & IT Requirements (BRDs & Caliber) Business Data Objects Surveys (data arch. Security, records mgmt.) Define Current State Define Projected Value & Benefits of Proposed Solution, including TCE benefits Conduct GAP Analysis Develop MOC plan 	<ul style="list-style-type: none"> Finalize future state business rules Create future state design including E2E linkages with customers' impacted processes Prepare customer integration plans (gap assessments, linkages, handover points) Develop deployment strategy & plan w/ collaboration of customers & stakeholders Update Design to Deploy Roadmap MTP Plan Create test scripts, training materials, test server checklist, and UAT kick-off presentation materials Update MOC plan Create Business Continuity Plan (BCP) 	<ul style="list-style-type: none"> Complete Test plans Execute Testing including: BVT/UAT execution charts, status report on defects, and MTP test validation results Review Output of testing/ Pilot for corrective actions before deploying further UAT Sign-off Deployment Training & Communication created Finalize Deploy & Training Schedule Develop adoption & performance measures for ongoing process metrics to manage ongoing improvement & corrective actions 	<ul style="list-style-type: none"> Communications delivered per MOC plan including customer & stakeholder communications Training completed and added to Training Roadmap Update intranet sites/publications and customer facing portals Complete data migration System & process go live Review baseline metrics and expected outcomes Move to production Post Implementation reviews Establish appropriate warranty period for the project that meets stakeholder requirements. 	<ul style="list-style-type: none"> Transition to post warranty business owner Conduct Administrative project closure Review final metrics and compare to estimates Document project value Establish ongoing metrics and measures, including adoption & performance measures Conduct project post mortem & publish lessons learned Celebrate success within GP and with customer!!

Check Point Reviews

What are Check Point Reviews?

- Mandatory project review of each significant project stage
- Scheduled weekly for 1.5 hours
- Go, No-Go and Further Actions Required captured & tracked
- Customer Centric focus

Benefits:

- Follows GP customer experience strategy
- Establishes an effective internal project management cadence for solutions
- Maps to HP's standard project management methodology
- Ability to assess and fine-tune projects before deployment
- Provides a valuable forum which considers business control needs, cross organization effect, customer impact and the overall cost/benefit of each project.



Solution / Customer approvals

What are Solution Approvals?

- Mandatory project review of each significant project stage
- Participants affected by new solution deployment
- Go, No-Go and Further Actions Required captured & tracked

Benefits:

- Follows GP customer experience strategy
- Effective internal project management cadence for new solutions
- Ability to assess and fine-tune projects before deployment
- Provides a valuable forum which considers cross organization effect, business control needs, customer impact and the overall cost/benefit of each project.



Measures & Metrics



"Businesses that succeed and make money constantly assess themselves and improve in all dimensions of their business; metrics are the cornerstone of their assessment, and the foundation for any business improvement."

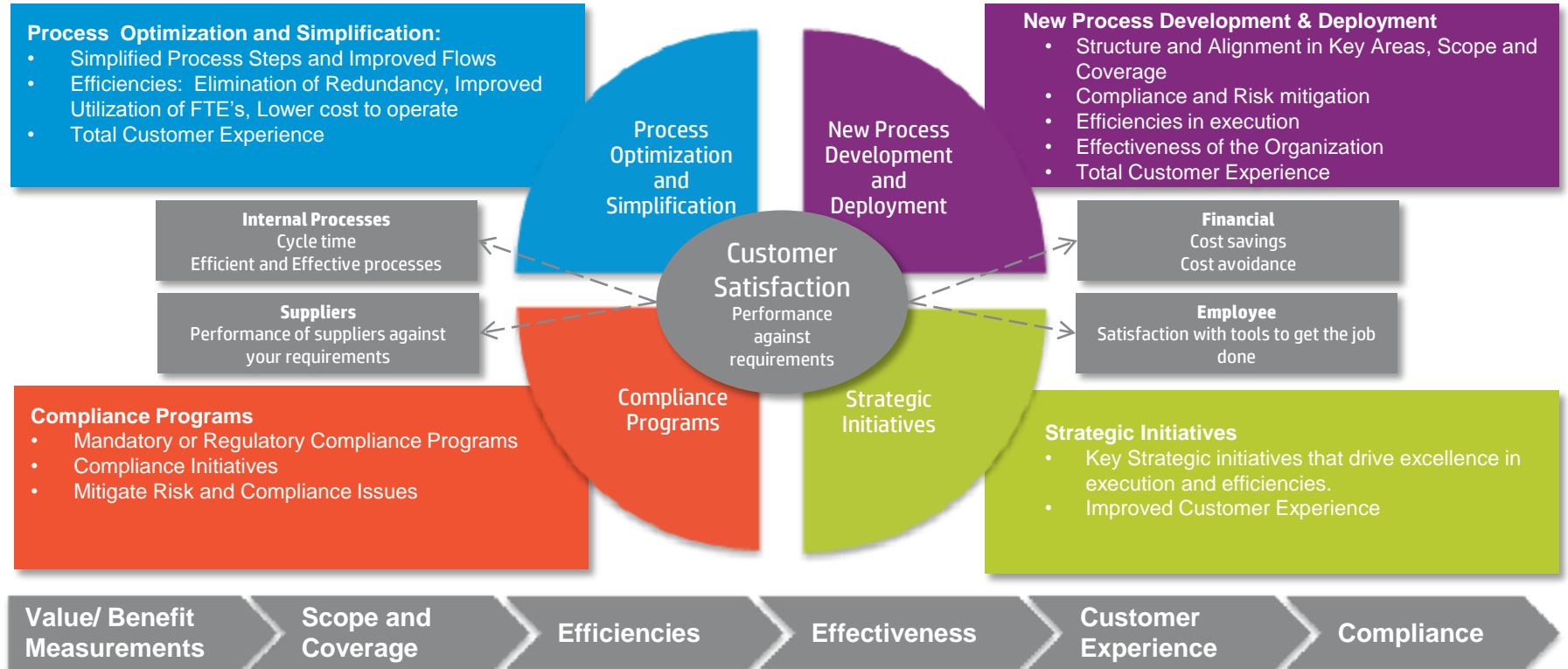
". . . measuring the success of a reengineering effort is a problem. More than half (54 percent) of the executives said they have no consistent, reliable way of measuring the reengineering benefits. "

CFO Magazine, May 1995



Global Business Process

Project Value/Benefit focus areas



SMART Metrics

- “**S**pecific”: targeted to the area you are measuring
- “**M**easurable”: collect data that is accurate and complete
- “**A**ctionable”: easy-to-understand, clear which direction is “good” or “bad”
- “**R**elevant”: don’t measure things that are not important
- “**T**imely”: ability to get the data when you need it



Process Indicators – keep it simple

Approach

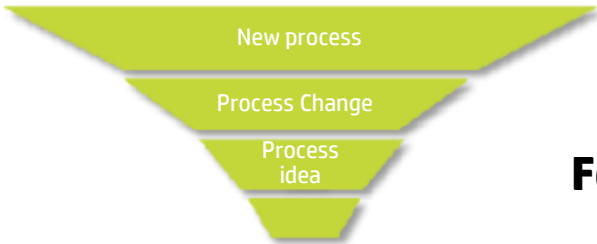
- Identify your customers and outputs of your process
- Determine your customer needs/requirements
- Ensure you understand the key goals of the business
- Determine effective measures



Governance

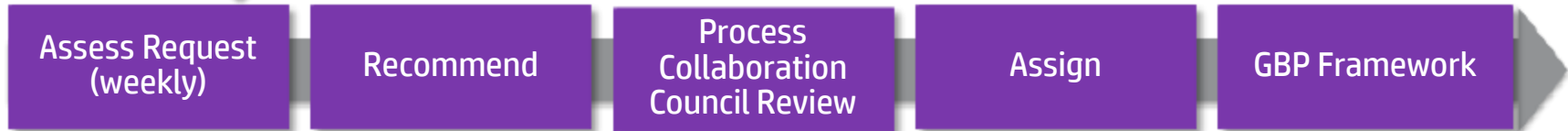


Governance – change management



Focus on top priorities for the organization at a global level

Process Request Funnel
(pre-approved by council member)



Process Executive Committee – Quarterly Reviews



Governance: Collaboration Council

Collaboration Council

Process

Technology

Operations

Customer

Responsibilities

- Ensure alignment to GP Strategic Initiatives
- Guiding solution decisions to drive increased adoption of global standards
- Minimizing exception requests and unique requirements
- Prioritization of workload across the entire GP organization

- New Request
 - Review request against areas of focus
 - Assess impact and benefit
 - Reset priorities, where necessary
 - Final decision on request



The Journey



The Journey...

Stabilize

Year 1

- Process Inventory
- Roadmap for Process Consolidation
- Process Portfolio
- Change Management Methodology
- Process “Design to Deploy” Framework
- Skill Enhancement; Employee Training
- Align Global processes to APQC PCF

Simplify

Year 2

- Process Consolidation
- Mandatory Process / Solution Reviews
- Standardized Process Documentation & Collateral
- Controlled Process Repository
- Enhanced Process Design to Deploy Framework
- Value Stream Mapping

Enhance

Year 3

- Process Metrics & Dashboard
- Solution Governance & Life Cycle Management
- Communities of Practice
- Solution Metro Map
- The Client Experience

Distributed, Minimal Standardization

Global Standards (local/legal exceptions only)



Q&A