PROCESS IN A PANDEMIC

In April 2020, Holly Lyke-Ho-Gland (Principal Research Lead, Process and Performance Management at APQC) and Jonathan Kraft (Project Manager for Process Performance and Knowledge Management Solutions at APQC) convened the first in a series of roundtable discussions on the role that process is playing during the COVID-19 pandemic. These roundtable discussions, which include panelists from industries including agriculture, aerospace, and utilities, provide an opportunity for process and performance management (PPM) professionals to discuss their current challenges and solutions as they help their organizations navigate the pandemic.

Roundtable panelists discussed topics including:

» The biggest challenges that PPM teams are facing;
» the role that process is playing in organizations’ responses to COVID-19; and
» how the pandemic is impacting efforts to design new processes or redesign existing ones.

This article provides a summary of the roundtable discussion on these topics and highlights the indispensable role that PPM is playing—not only to ensure business continuity during a crisis, but also to help organizations set the stage for a smooth and safe return to work.

Common Challenges for Process Teams

Process teams confront significant challenges as they work to ensure that their organizations’ processes remain strong in an unstable time. As a function that has long relied on in-person collaboration and workshops for foundational activities like process mapping, PPM is navigating a digital environment where collaboration is more difficult and important water cooler chats have disappeared entirely. Budgetary cuts have only added to these difficulties, as process teams struggle to do more with less and convince business partners to invest for the long term.

VIRTUAL WORK AND COLLABORATION

Historically, the physical presence of a process team in their organization has been critical for the accomplishment of process work. Process teams engage in collaborative forms of work more than any other function, and, until recently, were less likely to accomplish this work through virtual platforms. While PPM has seen the emergence of new strategies for virtual collaboration, roundtable participants noted that a lack of physical presence with one’s colleagues and peers means that achieving consensus in activities like process mapping or reengineering is more difficult to achieve right now. “It takes longer to work through things remotely than if you were all in one room and could lock the door to work together,” said one participant.

One of the most unfortunate impacts for some participants has been the absence of serendipitous encounters with cross-functional colleagues. Random conversations in an elevator or at the coffee bar are often how PPM professionals get informal updates about projects and, in some cases, about their budgets. For example, one participant noted that “the only way I can find out that my budget has changed is by running into somebody in a corridor—they don’t have
a process to get that information to me otherwise. We’re a small organization where we see each other often, but that’s not going to work now.” Even if someone is within easy reach through virtual chat, participants said, virtual platforms are a poor substitute for these chance encounters.

**BUDGETS, PRIORITIES, AND LONG-TERM INVESTMENTS**

Participants also noted significant cuts to their budgets as a result of the crisis. These budget cuts have led to lay-offs for many of the contractors who made critical contributions to process work, and more fundamentally, have meant that many upcoming projects are delayed or scrapped entirely. Budgets that were already seeing cuts before the crisis are now razor thin. “I was told that process mining wasn’t in our scope for this year because now I don’t have any budget for it—unless I can find a cost-free solution,” one participant said.

Broadly speaking, PPM teams are moving in a terrain marked by distraction. “The business improvement process is important, but now we have to balance that with more urgent activities,” noted one participant. The need for a process team’s business partners to ‘put out fires’ and attend to the most critical needs (like securing liquidity) means that process teams now have to work even harder than before to convince them of the value of process mining and other important activities.

While budgetary cuts and the urgency of the moment have shifted or completely derailed some projects, participants said the pandemic has also impacted the ability of their organizations to think expansively about the future. If “long-term” used to be measured in years, it’s now framed more in terms of months: “It seems like the focus has completely shifted toward a reactive and short-term mindset,” said one participant. “We’re usually the people who are looking ahead and building for the future, and right now everybody is looking at the immediate future—a month at the most.”

To add to this difficulty, the pandemic has also impacted forecasting processes, which could potentially cause ripple effects that last for years. “There are all kinds of models, reports, and forecasts that are based on standardized trending,” one participant noted. “When we look back at 2020 a year, two years, or five years from now, we’re going to see some really crazy stuff when we compare that to historical reporting. Do we just pull out this month, this year, this quarter? It’s going to make for some interesting times and analysts will probably be pulling their hair out.”

**The Role of Process Teams**

What role are process teams playing amid all this chaos? For roundtable participants, PPM is helping organizations stay strong by ensuring the continuity of business processes, accelerating digital transformation to enable remote work, and laying the groundwork to help ensure that employees can return to work safely.
BUSINESS CONTINUITY

While business continuity planning might seem unnecessary or even annoying to some, the current crisis is shedding light on its importance like never before. Organizations with well-documented processes and disaster recovery plans in place are largely reaping the benefits, while those with weaker processes or no plans are now scrambling to catch up. “One of the things that really impressed me about my organization,” one participant noted, “is that by January when news of what was happening in China started to reach us, the organization stood up their incident command structure—which was something they had predefined for any kind of crisis situation.” Because this participant’s organization had laid a strong foundation for disaster response before the crisis, it had a structure and processes in place to keep people informed, care for employees, and keep the lights on.

ACCELERATING DIGITAL TRANSFORMATION

While COVID-19 has taken some projects off the table or made them seem less important to PPM’s business partners, the pandemic has made other conversations and projects take on a new level of urgency. For example, participants noted that COVID-19 has accelerated the importance of digital transformation projects. One participant pointed out that “in the past, our legal department was very hesitant about adopting digital signatures—now they want to know more about them. People want to make sure that their processes can continue in a virtual environment.” Another participant agreed, saying that despite cost cutting, the crisis has meant that “people are more open to adopting and embracing a lot of these changes”—especially those that keep processes running smoothly without the need for business partners to be physically present in an office.

PROCESS DESIGN AND REDESIGN

Roundtable participants said that the current environment is bringing process challenges to the surface—but also accelerating the speed at which they can be addressed. As process teams redesign processes for a digital environment, one participant said, “it shines a spotlight on things that are slowing down the process and lets you ask, ‘why am I doing this piece of it?’” The cadence of process review and redesign is increasing for some processes, particularly those that touch compliance with various laws and regulations. The ability to dive more deeply into these processes, in turn, has meant greater agility for the work that the processes accomplish. For demand management processes, one participant said, “we can now move much more quickly to use our processes and respond to new demand signals and new regulations.”

Process teams are also playing an important role by helping to establish new processes and protocols for employees to return to the office. It is critical, participants said, to think from a user perspective about how to keep information accessible in the flow of work and reduce the amount of manual effort a process might involve. More broadly, PPM teams are working to ensure “employees feel they’re being taken care of,” and that the office environment is compliant with existing regulations.
**Conclusion**

While the challenges they face are formidable, process teams are playing a vital role in helping their organizations ensure that processes continue to run smoothly—and in some cases, even better than before. They are also taking important steps to help ensure that employees are supported, safe, and have access to the documents they need once they return. See APQC’s [Process in Times of Disruption collection](https://www.apqc.org/) for further insights on the role of process in navigating the crisis.

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