TRANSFORMING YOUR ORGANISATION WITH BUSINESS PROCESS IMPROVEMENT

THE PROCESS REVOLUTION

CRAIG REID
If there is one thing the business world badly needs it’s brave people like Craig Reid who are ready to take conventional ideas and turn them upside down, inside out, prod them and poke them – and help the next generation understand them, in a real, relevant and important way. My advice – join The Process Revolution, then when the time is right, go out and start your own revolution.

Andrew Griffiths
Australia’s #1 Small Business Author

Some of the most successful organisations in the world make delivering exactly what the customer wants every time look easy. In The Process Revolution Craig shares practical strategies, clearly from hard–won experience, on how to become one of those organisations – not one that will cease to exist 20 years from now.

Ivan Seselj
CEO – Promapp

Craig Reid is known around the world for his inspiring and innovative perspectives on Business Process Management. In this practical, no–nonsense read, he goes one step further to create a compelling manifesto for a process revolution. This is a call to arms to improve efficiency and customer experience that no organisation can afford to ignore.

Luke McCormack
Managing Director, Asia Pacific – Pegasystems
THE PROCESS REVOLUTION

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CRAIG REID
Dedicated to the memory of
Lillian Neelam - boss, mentor & friend.
Acknowledgements

In 2009 I started writing my blog, The Process Ninja, and along the way I’ve had the chance to meet and discuss business process improvement and customer experience with many around the world – both thought leaders and those fighting the good fight within organisations.

Thanks go to the loyal readers of my blog and to those contributing to a passionate community of “process people”. Particular thanks go to fellow process revolutionary Craig Willis for his contribution to this book.

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Lastly I would like to thank my friend and coach Robert Watson for taking on the unenviable job as my editor – for the second time! He has done a stellar job once again and I look forward to working on more books with him in the future.
You never thought the concept of “process improvement” could be made fun, engaging and downright enjoyable, did you? Well Craig Reid has done just that.

He didn’t just want to write a book about “process improvement”, he wanted to start a revolution. As you can tell from the cover of this book, this is not a boring, textbook type tome filled with bland mumbo jumbo. “The Process Revolution” is actually a series of stories, masterfully joined together, to show just what this whole concept is about and the rewards for getting it right (as much as the pitfalls for getting it wrong).

If there is one thing the business world badly needs it’s brave people like Craig Reid who are ready to take conventional ideas and turn them upside down, inside out, prod them and poke them – and help the next generation understand them, in a real, relevant and important way. My advice – join “The Process Revolution”, then when the time is right, go out and start your own revolution.

Andrew Griffiths

Australia’s #1 Small Business Author.
For many years I’ve spent almost every day thinking about how to help organisations improve their customer experience and reduce costs through the application of business process improvement. I’ve consumed books, articles, blogs, videos and keynotes with gusto and most importantly worked with over 40 major organisations over the past 20 years. I have continually refined the improvement process to rapidly and consistently deliver significant results.

This is a book that summarises the key issues, the “hot spots” that organisations face today and how they can start to focus their efforts to become truly customer-centric.

There are a multitude of handbooks explaining methodologies, tools and techniques on how to implement process improvement – but this is a book about the why of business process improvement. This is a book to digest then hand to your boss and your boss’s boss. It’s a book to inspire, to fist pump the air and most importantly to start a process revolution in your organisation ...
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PART ONE

NOW
EVERYTHING IS A PROCESS
Stop for a second and listen. Stop in meetings. Stop in the street. The word “process” is everywhere.

Listen to how many times the word comes up in conversations; “Follow the process”, “What is the process?”, “There’s a process for that …”

The reason why is simple: Everything is a process.

When you wake in the morning you get up and you follow a process. When you do your work, you follow a process. Process is simply a series of steps that are followed to achieve an outcome. It applies equally to both personal and business lives – and you can get better at both.

In business, every piece of work follows a process. No matter how structured or unstructured it may seem, there is a process that is followed. It doesn’t matter what department you work in, what industry you work in or whether you are chasing a profit or not, every piece of work follows a process. So can there be anything in business more important than keeping processes functioning as best as they can be? No, because process is simply the work that is performed day-in, day-out. It’s the work done in every part of organisations. It’s interaction with customers, making money and saving money. It’s growth. It’s everything.

So if business processes are so important, why do they so often cause problems for customers and the organisation themselves?

To answer that question, take a step back in time to where it all began ...
THE SCOTSMAN AND THE PIN FACTORY
The year was 1776 and famous economist Adam Smith introduced the world to the Industrial Revolution via his iconic book *The Wealth of Nations*.

Smith talked about what he defined as the “Division of Labour” – essentially splitting a process into specialised tasks – and he used the example of the making of metal pins to demonstrate the benefits of the division of labour.

*Each person, therefore, making a tenth part of forty-eight thousand pins, might be considered as making four thousand eight hundred pins in a day. But if they had all wrought separately and independently, and without any of them having been educated to this peculiar business, they certainly could not each of them have made twenty, perhaps not one pin in a day.*

What Adam Smith discovered was that instead of creating only 20 pins a day each, dividing their jobs into specific roles meant that those same men could make 48,000 pins a day. In anyone’s language, that’s an extraordinary increase in output.

It was no surprise that the Division of Labour played a major part in the Industrial Revolution and was the benchmark of how to organise a company during the era. Soon other industries followed suit, organising their companies into departments, divisions and specialist roles. It wasn’t long before everyone started thinking of work as a process, with a piece of work being passed from one specialist role to the next; a start, an end and lots of specialist work in the middle. In went the raw materials and out came shiny new products.

But it wasn’t just manufacturing businesses that were adopting it – large service industry firms across the world adopted it too – and for a large part, it was highly successful.

But as companies, products and marketplaces became both larger and more complex, so became the need to have more complex and specialised functions within the organisations. As a result work had to cross between more and more specialist roles day by day.

Fast forward to the present day and all organisations have a similar look. They have roles, supervisors, managers, specialists, teams and divisions with a structure
where work is passed through more hands than ever before.

They seek to improve processes but continue to approach them like a Scottish pin factory. They add more roles, restructure and train staff, often to no avail. Organisations become bigger and more complex. Work slows down, it gets lost and customers are frustrated and confused.

20 years ago, organisations could get away with this as customer expectations were considerably lower. But times have changed, and there has been a fundamental shift which will spell an acceleration of the end for many firms ...
The Golden Age IS OVER
87% of the Fortune 500 companies that existed in 1955 are no longer on the same list today*.

Some went bankrupt, some merged and some fell from grace. Many lost their way, and in turn lost their customers or failed to keep up with the times, and faded away. Some imploded through financial fraud or scandal.


Borders book sellers, founded in 1971, were a classic example of a company so obsessed with its buoyant performance that they failed to look to the future. In the 1990s they were successfully expanding globally with impressive profits and had 19,500 employees and 511 stores in the US alone. By 2011 their failure to adapt to new technologies and a changing marketplace meant that their only option was liquidation.

Now look at your company today, and ask yourself if it will still be around in 60 years? Will it be around in 30 years or even 10 years? If the statistics are true to past form, almost 9 out of 10 people who are reading this book today are working for companies that will not last the test of time. It’s a worrying thought for those leaders that are putting blood, sweat and tears into building better organisations.

The good news is that if organisations take steps to change things now, there is great hope for them not just to survive, but to thrive.

The bad news is that large organisations are going to find it harder and harder to stay successful and here’s why ...
Today technology is creating a radical shift. Big businesses are facing the challenge of small businesses who do not accept the structure and the authority that has gone before. Today small businesses have the technology to take on big business and win. The playing field has changed forever. Small- to medium-sized businesses are real competitors to be wary of.

Every small business today has the potential to challenge large organisations, and the worrying thing for these firms is that small businesses don’t need to spend a lot of money on technology and they don’t need to have a lot of staff. With the right tools in their hands, they can compete effectively with big business and more significantly they have the ability to change faster than their larger competitors in order to improve existing products and to get new products to market.

Founded in 2008, Airbnb is now the world’s biggest accommodation provider with 1.5 million individual properties around the world. Their expansion has been so rapid and has created such a viable alternative to hotels that major hotel chains are resorting to “dirty tricks” campaigns to try to sabotage Airbnb’s growth.

There’s no room for a lack of pace in today’s business world. But because of the complex structures that have been created in large organisations, they have slowed down their ability to deliver value. Today, every business is in a race and every race is a sprint. Customers’ levels of patience have diminished to the point where they want immediate gratification. Large organisations with thousands of employees bringing products and services to market are handicapped by having to pass work through complex processes to get products and services into the hands of customers. The more channels, departments and specialisations that organisations have, the longer work takes. Even if they have great technology, the complexity of organisations slows them down and causes errors.

So how can large organisations compete with smaller, more nimble operators that have the technology in their hands already? These companies don’t have the complexity or the inflexible structures in place and as a result can take things to market rapidly.

So how can your organisation compete with that? Process is the answer ...
ORGANISATIONAL DEATH ROW
Organisations are facing a higher risk of extinction than ever before. At first it may seem baffling that today’s powerful places of work may not survive. After all, those thousands of employees, those billions of dollars, they can keep an organisation on the straight and narrow, right? But new competitors are eating into those organisations’ market share right now. It might only be a trickle, but it may be a tsunami in a few years unless they can embrace process change to simplify.

Any company that’s yet to take a hard look at itself and question the structure and function of their business processes is opening the door to a precarious future where the clock is ticking.

*Apple is a classic example of a company that came back from the brink. Stuck in an unprofitable rut they had become just another personal computer manufacturer. With the return of Steve Jobs the company was born again and started not only to revolutionise what the personal computer was all about but started to expand their product offering into complementary areas that reflected the customer experience. By doing so Apple created a product ecosystem that was hard for customers to resist.*

*Like Apple, the power to change is in your hands. Can you have the courage to look at your organisation, look at the way things are done and change? Will you face up to the executives who say it can’t be done? Will you face up to the technologists who say that they can’t compete because they don’t have the right technology? Will you face up to the customers who have been telling you for years that your products and services aren’t good enough, but yet, your Board and executives claim that they are? It’s time to take an honest look at yourself, to ask where you will be in ten years’ time. Will your organisation be on death row, or will you change your business model to adapt, survive and thrive?*
A student once asked Albert Einstein why the questions of an exam paper were the same as last year’s. Einstein quipped that “this year, the answers are very different”.

In the business world of today, the same thinking applies. The world is changing at such a competitive rate that it’s making heads spin. There’s technology that is free today that cost tens of thousands of dollars a decade ago, but the questions in business remain the same:

“How do I grow my business?”

“How do I stay successful?”

“How do I create greater profits?”

This year, however, the answers are different. The answers are in technology. The answers are in being small, nimble and fast.

Despite the great leaps forward in technology, many large firms lag several years behind their smaller competitors. It is still not uncommon to see large organisations with desks filled with manual paperwork whilst their competitors invest in electronic document management and workflow technologies that reduce bureaucracy and instead speed services into the hands of customers.

These organisations often wear their antiquity like a badge of honour. After all, if an organisation has been around for 100 or 200 years it shows their incredible stability – the sign of a great company.

In the old days, it may take a competitor decades or longer to catch up with your organisation. Not anymore. Since the birth of the internet and social media, there has been an explosion in companies growing in size from zero to billions of dollars in only a few short years. Who’s to say that the company started today can’t grow to a competitor tomorrow? Well no-one is saying it because it is happening.

Facebook, Google, Airbnb and many other web-based firms are only a few years old and worth billions of dollars. What will your organisation do to compete if an upstart comes along in your industry?
Battleships

and Dinghies
Large organisations are like battleships – fierce, resilient, strong. Yours has guns, big guns, and they know how to fire them. But you also know that it takes the battleship around 3km to turn around. They’re racing towards a goal, but to get there they need to navigate through a series of challenging islands. Meanwhile, they see a small dinghy joining in the race. The dinghy might not be as fast, but boy that dinghy can turn rapidly. It can twist and turn and navigate through those islands while your battleship is still trying to make the first turn.

Before they know it, the dinghy has raced ahead and is crossing the finish line well before them. But the scary thing is there isn’t one dinghy. There is a multitude of dinghies and they’re all going to cross the finish line before your organisation; that is, unless they can find a way to make themselves nimbler and more competitive. But how?

The answer is looking at your business and creating processes that are rapidly adaptable to change (and to have the capability to do so when required). It’s not necessarily about breaking the organisation into smaller components (although this may sometimes be required) so much as the ability to turn as rapidly as the dinghies.

Now you might find this concept confronting, or even you may not agree. We’ve got the firepower. We’ve got the big guns. We will just blow them out of the water. But the fact of the matter is that their market share is going to be facing death by a thousand cuts. It might not be today. It might not be tomorrow. But it will be soon. And if your organisation doesn’t change now, that fleet of dinghies is going to be approaching rapidly, and the results will be predictable ...

The market share of a major recruitment firm was being eroded by smaller “boutique” recruitment firms. A senior recruitment consultant for the firm remarked that “People keep asking us what our niche is ... and we don’t have one”. The battleship had been sailing along in the one direction for many years, oblivious to the threat from the rear which was rapidly approaching.
Flexibility is the NEW BLACK
Technology today has changed the game plan and the playing field is increasingly more level. Big businesses no longer have the advantage they previously had. The digital era has turned things on their heads.

But it’s also a consumer revolution. Never have customers had the ability to express themselves so rapidly or as effectively.

What does this mean for organisations? It’s a case of adapt or die. Social media gives customers a voice to express their opinions like never before (both good and bad). They are now able to be heard by the world – and heard instantly.

Those blundering organisations that don’t return calls, don’t respond to e-mails and don’t give the service that they spend so much money advertising are going to have a wake-up call. They have never been at risk of such consumer erosion in their history. They are at risk from upstarts, from small business, from competitors who “get it”.

In the last 30 years customers have gotten used to being disappointed. They’ve gotten used to irritating processes designed to make it easy for the company and not the customer. Not anymore. Customers now have the power and they’re using it. Organisations are firmly within an age where customers will start to expect a higher standard of service than ever before. Remember “good old fashioned service”? Well it isn’t old fashioned anymore.
THOSE YOUNG Whippersnappers
The growing impact that technology has today is obvious, but depending on when you were born your relationship with technology will be different. Generation Y are now at an age where they are exerting a powerful influence on the expectations of the customer experience.

This much-maligned group of people are moving up the ladder into positions of power. They’re also getting to the stage in their lives where they’re starting to settle down and have children. They’re entering new phases of their lives where they have substantial purchasing needs and the ability to fulfil those needs!

Because of this, organisations are now undergoing a substantial shift in terms of meeting customer expectations. Generation X, with one foot in the past and one in the present are being slowly dragged into the future. They are still attuned to the “old ways” of doing business: phone calls, letters, appointments and that old technology, email! As a result their expectations are more easily met.

Not so with Generation Y. Gen Y are immersed in technology. There is no foot in the past and as a result their level of expectation of how they wish to do business with your organisation is radically different.

So if the aim is to attract and retain the Gen Y market as customers, your organisation better get things moving fast. Gen Y does not want to live and do business in the world of Gen X. They won’t put up with waiting and they won’t put up with having to pick up the phone or email. They want everything available how it suits them and they want it now.

The challenge for organisations is to cater for the next generations as well as the current ones. That means investing in technology and continuous improvement. Standing still is not an option. The market is like a treadmill, if organisations stop running and get off they may never get back on again.
 PART TWO

PAIN

The following section summarises the 8 key problems that contribute to organisational and customer pain ...
POOR CUSTOMER EXPERIENCE
Everyone today is talking about customer experience, but why has this chatter only grown louder in the last few years?

Today, organisations are experiencing a completely different mindset. Customers don’t want what customers of yesterday had. They want something bigger and better and broader. They don’t want to use a product or service; they want an experience. But, what’s the difference?

Many remember as a child the excitement of going to the airport and getting on an airplane and getting off at the other end. This has been the approach that many airlines have taken over the past 30 years. But customers of today want an experience. They want it to be easy and enjoyable and it’s not just about getting to the other end on time.

They also have different levels of expectation regarding the experience they want. Some want a no-frills experience. A cheap flight with no food is enough; it’s as good as getting on a bus. Some other customers may want a higher level of experience – the food, movies, faster boarding and a comfy seat – and they’ll pay for it.

Airlines such as Ryanair (Europe) and Southwest Airlines (US) have used this strategy to build some of the most profitable airlines in the world. Passengers can have a better customer experience, they just have to pay extra for it. The key is that they have the choice.

The customer experience starts even before the seed of need is planted in the customer’s mind. Before a customer chooses to even take a flight, they look at all the permutations and the options. Often, the flight is just a small part of the process.

Before they get on the plane, they want to know what they can do; whether there are movies, games for the kids and what they will get to eat. When they get off the plane, they want to know that it’s easy to get to the hotel and that their bags will arrive in time and that they’re not left without the things that they really need to start enjoying their trip.
Business process helps organisations to understand, analyse and improve the entire customer experience. A key part of this is understanding that the customer experience does not start and end within the doors of an organisation. It’s about standing in the shoes of the customer and looking at the organisation from the outside in and seeing broader opportunities that they can provide. Some organisations call it customer-centricity. Some call it putting the customer at the centre of everything. Disney calls it True North. It doesn’t matter what it’s called as long as they can stand in the customer’s shoes and give them not just what they need or want, but a little bit more than what they expect.

But looking at the customer experience in isolation isn’t enough. How organisations react when things go wrong is a critical part of ensuring that their customers not only stay loyal but they readily recommend. Customers today are more vocal than ever before and they have more ways to express their opinions and organisations must embrace this. Customers are a ready-made research and development team. There’s so much information available that it makes no sense to keep ignoring the feedback from your customers. After all, they know best, right?

Those organisations that are the best at improving the customer experience are those that not only respond to feedback from customers, whether negative or otherwise, but they actually contact those customers and they proactively implement changes that customers suggest.

Today’s research shows that those organisations which adopt a customer experience approach have customers that exhibit three key elements of loyal behaviour: they buy more, are more reluctant to switch to a competitor, and are more likely to recommend the company to others*.

Often organisations say that their customer satisfaction scores are great, so they must be doing a great job providing an exceptional customer experience. Sadly, that’s not always the case. Customer experience and customer satisfaction are very different. Take the airline example. If the airline commissions a survey which asks about the flight itself, the customers may say that they had a wonderful, smooth
flight with great service but if they haven’t considered the passenger’s perceptions of getting to the airport, recreation facilities at the airport, ease of getting around, the check-in process and how well the queue for the gate is managed then the small survey of in-flight satisfaction misses huge opportunities for optimising the customer experience. It’s like taking a test where you pick only the questions that you think you can answer.

Firms today are often focused too inwardly and need to look at the entire experience of their customers, both inside and outside the organisation. To solve this, they must try to throw off the shackles of industrial revolution thinking to create structures that are simpler, closer to their customers, and where staff are empowered and supported.

The logic is simple. A customer experience approach improves revenues, profitability and creates happier, more loyal customers.
Too Slow To Change
Today’s organisations are being increasingly challenged by smaller, more nimble competitors. Large, complex organisations are often too conservative and risk averse to be able to change to compete as rapidly as they require. However, organisations can turn this around by adopting agile methods combined with greater risk-taking in order to compete with these upstarts.

There are now so many specialist roles and teams that completing work is a slow and costly process. Moreover, when leaders get great ideas and want to execute on their strategy they’re frustrated by the time that it takes to change.

Frequently organisations get to a tumultuous point where they realise that they not only need to change, but they need to radically transform. When the organisation has recognised that it’s time to transform, it means that the leaders have recognised that there is a “burning platform” – a real need for significant change that they must ensure happens for the sustainability of the organisation. The incremental changes to process and the business model should have been occurring over time, but have not materialised, resulting in the need to run rather than to walk.

Often organisations throwing themselves into transformation initiatives are taking a huge risk. However it’s a risk that they feel they have to take because they’ve fallen so far behind their competitors that radical action is required. Instead of making incremental changes over time, looking at the customer experience and looking at the way their business processes are organised and aligned, they delay the necessary steps.

Many of those organisations have hit the panic button and need to change and change rapidly. This is because their market share has been declining, competitors are increasing and their products and services no longer have the bang for buck with customers that they used to have. In effect, they panic and scramble to change as quickly as they can.
In the business world, profit is king. Jobs depend on it. Boards are changed because of it. Many large organisations have reached stagnation in their level of market share, therefore profitability by reducing costs becomes a key focus.

This is because attracting new customers is both difficult and costly, particularly in a highly competitive marketplace. Reducing costs is not so hard to do. However many put barriers in place that trip themselves up when trying to reduce costs. A key problem is a lack of visibility of the work that is performed across their business. They don’t know what particular roles do and they don’t understand the end-to-end process. They don’t look at the process to understand what’s happening and as a result they end up creating processes where there’s duplication of effort and unnecessary manual work.

Organisations are often so busy producing the same old output that they don’t question whether they are doing the right things, not just doing things right. By examining their business processes and understanding every task that each role does within a process, they can identify where costs are hidden.

But why do organisations get to this state in the first place?

When processes are initially put in place their level of quality varies greatly. Projects are rushed in and “temporary measures” are put in place. These often become entrenched and difficult to change. Even if processes that are established are of high quality, over time a particular department might add a piece of work to the process to make things better for themselves. Maybe they notice that errors are occurring, so they include an extra check point in the process to stop those errors occurring. Other departments then add their own steps into the process to make things better for themselves. Maybe they don’t realise that the same checks have been performed earlier on in the process. By the best of intentions staff try to make things better but they fail to look at the entire end-to-end process to see the impacts.

Over time, processes change, and mutate from their original intent. Steps are added and each piece increases the cost, slows the process down and introduces
increased risk of failure. This results in bloated processes that are complex, irritating for the customer and which reduce profitability.

To boost profits, organisations need to challenge entrenched business rules and processes to eliminate work that is adding no value.
Today’s organisations are entrenched in cycles of project delivery. You’ll find program managers, project managers, teams of people, business analysts, process analysts and project co-ordinators. Everything of importance is run as a project.

Just as they rush to embrace transformation when they require major surgery, when they require a major project, they scramble to put together project teams, build business cases, and go on the slow arduous journey of implementing change. But that’s just the start. Projects have become so large that they’ve evolved a whole new set of roles and categories by which to manage them. No longer do organisations have only project managers. There are program and portfolio managers too! There are new hierarchies created to manage the increasing complexity of large programs of work. There are complex sets of processes simply to run projects and programs to allow them to implement even more complex processes! Despite new hierarchies and roles many projects still fail or miss their required deadlines resulting in great cost to the organisation both financially and in opportunity cost.

Why, after several decades, are projects still failing to meet their goals so regularly? The first reason is that organisations are still ignoring the customer experience (which is always much broader than organisations initially think). This creates a myopia that leads to both missed opportunities and costly errors.

The second issue is that out-of-date methodologies are hamstringing project delivery. For the last 50 years organisations have stringently followed linear delivery processes that evangelise the need to complete one step after the other in a regimented order. Organisations have been using linear “waterfall” methodologies for decades, and the penny is now starting to drop – they’re slow, lack business and customer involvement and as a result produce output that is often a disappointment.

Thankfully many today are adapting to create more agile methods of delivering software and services that customers need. But they still have the same issues with project management. Projects take too long and are too costly. Often by the time they’ve implemented projects, their competitors are ahead of them. They’ve failed to get to market fast enough to get the competitive advantage.
So what is the answer to these project problems? Part of the answer lies in the use of project delivery methodologies. Current methodologies have created levels of bureaucracy and command and control that are as complex as the organisations themselves. Projects create false structures that shouldn’t exist in the first place. By managing business processes effectively day to day and implementing continuous improvement, the need for large projects is significantly reduced and as such the high inherent risk of complex projects is also reduced. The bureaucracy, approvals and expenditure that go hand in hand with projects can be significantly reduced if organisations are adaptive and adopt continuous improvement as part of their organisational DNA.
Losing/Not Attracting Customers
Smaller upstarts are stealing customers through better customer experience and being quicker to market with products and services that customers not only want, but love. Fortunately organisations can design superior customer experiences that create loyal fans that not only won’t want to end their patronage, but who will recommend the company readily to others.

Companies today work incredibly hard to acquire new customers and they spend enormous amounts of money to get them. Traditional marketing, digital marketing, social media – there are now more ways to spend on marketing than ever before. Throw into the mix complex joint ventures with other companies and they are fighting tooth and nail to take customers away from their competitors. Then, what do they do when they finally get them to come on board as a customer? They feel like the hard work has been done: they’ve agreed to marry them and as soon as they carry their customer across the threshold into their organisation, they dump them on the floor and ask them to wash the dishes.

Companies today have to understand that the effort is not just in getting the customer but it’s in keeping the customer, and building the relationship with that customer through the experience of every single part of the organisation. Each interaction with the company is an opportunity where the positive result will build the relationship or negatively, knock it down. Interactions with the customer and the company happen over the entire customer lifecycle, and can contribute to a growing feeling of dissatisfaction or satisfaction with the company. Every interaction (including using the product or service) affects this delicate equilibrium.

Judgment of customer experience is like an emotional bank account. Organisations can deplete the customer’s balance through negative experiences or deposit positive experiences into the account. Of course organisations should always try to prevent negative experiences from occurring; but in the event they do occur positive experiences can help to refill the account.

Overall, the emotional balance has to be a positive one, and the balance has to be consistently high if they wish their customers to be recommending their products and services to others. How they handle each of those interaction points
is critical. It doesn’t matter whether the interaction is via web, phone, in person or simply using the product. Every single interaction must be designed, analysed and optimised. In the rare event that something does go wrong, there must be a strategy to manage those situations to create a positive experience out of a negative one.

Not only can they keep their customers happy and increase their uptake of other products, but if they prevent dissatisfaction from occurring, they eliminate the negative PR that will stop customers from even considering doing business with them. Dissatisfied customers have more opportunity to tell the world than ever before via forums, Facebook, Twitter and online reviews. One negative review and a customer who is determined enough to tell the world can cause significant damage to an organisation.

*Take the example of “United Breaks Guitars” where a dissatisfied customer of United Airlines wrote a song to tell the world about how the airline broke his guitars. The song went viral and had such an impact that United’s shares dropped 10%*.  

So the next time there is a customer who complains, put every effort into that complaint to avoid further damage because every complaint is bigger than just one customer.

*Did Dave Carroll lose United Airlines $180m?  
http://www.economist.com/blogs/gulliver/2009/07/did_dave_carroll_cost_united_1
COMPLEXITY
Today, the structure of all large organisations looks the same. They’re a hierarchical pyramid with the top level staff cascading information down through layers of management to back-office and frontline staff.

Staff at the bottom of the pyramid deliver the most important service to the most important people: customers. Information and strategy is cascaded down through multiple layers to get to the staff at the bottom who are so busy looking after customers they barely have time to digest the information. How will the vision and the goals from the top filter down through so many layers? Chinese whispers mean that the message is often muddled, confused and misheard by the customer-facing staff – or simply not deemed a priority above their day-to-day work.

Business today is complex and organisations respond to that complexity in the manner that they’ve responded to it over the last 100 years. Whenever work starts to overwhelm a particular job role, the role is split into two and a deeper level of specialisation is created. As a result, the pyramid expands. As the number of roles expand so do the number of departments with their own responsibilities, objectives and Key Performance Indicators (KPIs). These departments are conditioned to focus on their own KPIs typically with minimal consideration as to the impact on those within other stages of the process. These are typically referred to as “organisational silos”.

This creates a situation where teams focus on meeting their KPIs but to the detriment to the overall process and the outcomes for the customer. Complexity slows down the throughput of processes and the delivery of value to the customer.

*During Improvement workshops many of the people in the room understand their own section of the process and they’re very good at it. But when they are all brought together to document the process the result is always the same – amazement. The most common comment is always “I never realised it was so complicated” – the next being “I didn’t know you did that. We do that too”. Finally comes the daunting realisation, “If this is so complicated for us, what is it like for the customer?”*
There’s another important effect of complexity. It’s both draining for staff and management. Every time organisations introduce additional complexity, they’re creating more hoops for staff to jump through which increases the level of frustration and decreases job satisfaction. Every day organisations make their staff solve the same puzzles over and over again. These puzzles are created by the complexity that has been introduced to organisations in a vain attempt to solve business problems.

Staff want to do their jobs, enjoy them and produce a result which provides satisfaction. Anything that takes away from that end result is an annoyance and an irritation. When complexity is created staff are taken away from the tasks that they really need to be doing.

Process improvement is the tool that can smash down the barriers that complexity builds to create leaner, more customer-focused organisations.
POOR
STAFF PERFORMANCE
In many organisations, staff feel like they are simply a number. It’s difficult to make people feel loved in organisations of thousands of people, but it’s the duty of organisations to try. Engaged and motivated staff treat customers accordingly, so before asking customers to fall in love with an organisation, it’s their obligation to start with employees and in particular the staff that assist customers on a day-to-day basis.

Sadly frontline staff are often the victims of poor organisational design that does not support the customer experience. By the time a customer reaches a “real person” they have already been subjected to a gruelling assault course of phone systems, identity checks and queues. When they do finally get through, chances are the slightest deviation of their problem will land the customer transferred to another specialised team where they will repeat their identity check and story all over again. Is it any wonder that a long line of already disgruntled customers ensures that these jobs are seen as the most undesirable and have the highest rate of turnover?

It’s up to organisations to empower frontline staff and build staff capability that will provide an exemplary customer experience. Business process helps tame poor staff performance not only by supporting the staff with the tools that they need to really do their jobs effectively, but to have the visibility to support those staff.

Many frontline staff don’t have the technological capabilities to be able to do their jobs properly and management don’t have the visibility of what their staff are doing to be able to improve business processes to provide a better customer experience. By having visibility of the entire end-to-end process, they can implement a culture of continuous improvement that can take organisations to a higher level of process maturity and customer experience excellence.

Frontline staff are the key to great customer experiences, but in many organisations they are challenged by a lack of support. To solve this problem, conventional organisational structures can be re-designed to build new customer-focused structures that see employees empowered to use freedom within boundaries.
BROKEN PROCESSES
Within every organisation there are problem processes and they aren’t hard to find. Staff chuckle about them in private and point fingers when others aren’t looking. They’re typically associated with teams that are underperforming and which have a poor reputation for productivity.

But what characterises these processes? Typically staff will have been performing work the same way for several years without change and the processes are characterised by a lack of technology, paper-based systems, spreadsheets and over-exuberant levels of work tracking. Other staff will point out that the teams performing work in the process are difficult to deal with and highly resistant to change.

Often customer feedback will point the finger in the direction of these areas through customer complaints and customer satisfaction surveys. These broken processes are an open wound for organisations, bleeding costs and killing profits.

But where there is pain there is hope. These processes are like gold nuggets waiting to be discovered. By fixing them, organisations can build a business case for process improvement which will cascade through the organisation. These nuggets can provide impressive cost savings and significant improvements – the first find that will inspire them to mine further veins of customer gold.

The following section will help to identify your organisation’s issues and will pinpoint actions that can be undertaken to start a process revolution...
In this section, you’ll read about the demands of customers and the need to change your organisation and change it quickly. To be absolutely clear here: there’s no time to delay. What you will find here are a series of small activities that can make a big difference: how your organisation can embrace the process revolution to overcome future challenges.
MEASURE FOR PROFIT
Why measure when you know a process is broken?

Why measure when it’s already caused a catastrophe?

One day someone will come along and say, “How can we justify all this spend on process?” and if they haven’t measured anything they will have nothing to disprove them. They’ll pack up the little process shop and go back to counting their beans, happy in the knowledge that they’ve saved money – even though they’ve cost the organisation more money in the long run.

So here’s what your organisation must do – measure everything. Measure before the start, measure during and keep measuring when they’re done. After that, start measuring again. Organisations must always be constantly aware of where they are – that way when they make a change they can measure exactly how much they’ve achieved and thereby prove the power of process. Process is a compass, but if you’re in the dark you’ll never see where you’ve come from or where you need to go.

**TALES FROM THE REVOLUTION...**

A contact centre wanted to improve their process around identification of customers. They were going through a manual process of asking security questions. By using pin-code technology they discovered that they could cut 30 seconds off the process. That doesn’t sound much until you consider that they had over 1 million calls a year which resulted in a $1.2m saving per annum.

The number one reason for doing process improvement projects is still cost reduction* and there is still plenty of fat in most organisations to be able to extract great savings to boost profitability. But what are the key criteria you should look to measure to demonstrate the value process improvement is providing to your organisation?

* Source, PEX Network
START YOUR REVOLUTION

Firstly, let’s understand one thing: organisations are fascinated by pinning a percentage on each process so that they can show this to senior managers and say, “We’ve reduced the process time by 30%!” It’s impressive rhetoric but is ultimately meaningless unless provided in the context of other criteria ...

Secondly, what time is being measured? Is it effort time or elapsed time?

Elapsed time refers to the total time from start to finish of the process from the customer’s point of view.

Effort time means the actual amount of time your staff take to do work in the process.

A classic example is that it may take 2 minutes for your staff to write an email (effort time), but if the email sits in an inbox for 2 hours it is adding to the time of the overall process (elapsed time).

Both types of timings are important depending on the goal: elapsed time has a greater customer impact (“Why is it taking so long!?”) whereas effort time is a more telling diagnostic for efficiency. Of course a reduction in effort time also decreases elapsed time, and it is still possible to have a process which is efficient in terms of effort time but a laggard in elapsed time (watch out for those sneaky ones). Thus, it’s vitally important to measure both for every process you analyse.

So what is a “good” level of improvement? Well it’s not quite that simple. A 0.5% elimination of effort time can be a fantastic improvement. It all depends upon one very crucial ingredient: volume.

A small time improvement on a high-volume process can result in huge savings. Conversely, if you can save 75% of effort time off a process that is only conducted 200 times a year, the costs of implementing the process change may outweigh the benefits.
Take the time to measure both effort and elapsed time, but remember that the most important measurement is the experience of your customers – so don’t reduce process time if there is likely to be any negative impact upon their experience.
STOP CHECKING THE CHECKERS
The command and control hierarchies that organisations built over the last 200 years are born of another era. It was an era of unskilled staff, employed in great numbers with little education and limited prospects. A poignant effect of these structures is the limited scope that many roles have and the lack of initiative afforded to them.

Often this is perpetuated in a lack of trust in employees that flows through the organisation. Often there are several sets of “checkers checking the checkers”.

**TALES FROM THE REVOLUTION...**

A major home loans provider wished to improve their speed to market of home loan processing. Analysis of the process revealed that firstly the mortgage broker would check that all the required documents were present before sending it to the processing team. The processing team would then check that all the documents were received. They would pass the documents to the home loan assessor who would check all the documents were present. Once the assessor had completed his assessment the documents would be passed to the Quality Assurance (QA) team to check that all the documents were present. The QA team would pass them to the solicitor to check that all the documents were present. Only then could the loan be settled. At each hand-off in the process additional delays occurred which made them uncompetitive in the market place – their competitors had their offers to customers days faster.

This effect is amplified in organisations where there is a great deal of fear about doing things wrong (low appetite for risk). Rather than fix the root cause of the problem, organisations throw extra staff at the problem which creates “band-aid solutions” that continue to incur cost and inconvenience.

When organisations are highly risk-averse, they start to struggle to compete. Organisations must understand that risk is inevitable. They’re surrounded by it and it cannot be eliminated. The organisations that will continue to thrive are those that know how to push the level of risk up without damaging themselves.
To fix the problem of risk adverse over checking, start by analysing the end-to-end process and displaying the process visually to senior management. This will help them to clearly see duplicated effort. Calculate the cost of the duplicated effort and create a business case to show the benefits of investing in technology to eliminate the duplicate effort. Question historical decision-making to try to eliminate checking that is no longer required. Don’t underestimate the cultural change required to achieve this.

Next, aim for consistent processes by using the processes where there isn’t an onerous level of checking involved as a template to develop other processes. Introduce technology to prove the business case for automation on a process-by-process basis.

Don’t get comfortable. Ensure that continuous improvement methods are in place to make sure that knee-jerk reactions don’t add extra steps to your processes which allow the organisation to regress.

Organisations today have no choice; if they want to succeed, they have to get smart about managing risk. This means eliminating the checkers who check the checkers who stifle organisations’ ability to grow, to be agile and to deliver innovative services to their customers.
ELIMINATE

STOP

EXCEPTIONS
Things go wrong in business – it’s part of life. Disasters happen, customers become disgruntled and there is often a fall-out which requires further investigation. As a result committees meet, make decisions and steps are put in place to “prevent it from ever happening again”. Of course, this often means that additional checks and balances are added to processes which then become the norm. Over time, several of these changes may occur adding even more steps to the process. The process expands, requires more work and becomes increasingly slow and costly. Furthermore it starts to meander off course from its true intent – providing something of value to the customer. This is felt particularly acutely when all work is funnelled through what is thought to be a “standardised”, “best practice” process.

**TALES FROM THE REVOLUTION...**

After a robbery at a major bank the executive team decided to bring in a security firm to provide guards at each branch to prevent further robberies. They employed an external security firm at considerable expense. 10 years on, the same security team was still in place (still at considerable expense). They had become an ongoing joke in the organisation – sitting at their security desks playing solitaire rather than monitoring the video screens. Now the intent wasn’t necessarily wrong, but the execution was. A process review highlighted the huge cost that the security guards represented. There were several other options including bringing the security role in-house, re-negotiating the external contracts or even creating a role where the security guard could also act as a concierge to improve customer experience. Unfortunately the exception had become an embedded part of the process.

On the contrary, Airports and Airlines have developed exception processes that are only invoked when required. Whilst they have defined processes for turning round an aircraft or moving passengers through security they constantly have to deal with issues such as late aircraft caused by technical or weather problems. Dealing with exceptions becomes the norm - they do not try to build the exceptions into the standard process but develop sophisticated exception processes to deal with them.
START YOUR REVOLUTION

Start improvement by identifying those parts of processes that have been introduced to handle exceptions. Rate each exception on a scale of 1–10 based on the likelihood of the exception occurring. Understand the costs per annum of managing the exceptions then compare this to the cost to the organisation of the exception occurring.

A classic example of this are insurance companies that follow a detailed assessment process for small claims. Often the cost of the assessment process is greater than the value of the claim. For small claims it is often more cost effective simply to pay the claim without assessment then audit a sample.

Next, help management to understand the implications of forcing work through a standardised “one size fits all” process. If automation is not an option, design exception processes that are only applied according to particular business rules, not for every piece of work passing through the process. Be wary of creating exception processes when there is no need for them to exist in the first place. Look to hire staff that have the capabilities to manage exceptions within a defined set of business rules.

Organisations today must be educated not to hit the panic button when exceptions to the process cause problems. Knee-jerk reactions can cost organisations millions of dollars unnecessarily. So when making a change to a process, always consider the likelihood of that exception occurring again and ask yourself whether it’s really worth changing it for good. If it is, build a slick exception process that is only invoked when required.
This sounds like my organisation

A Lot  A Little  Not At All
One of the most wasteful problems within organisations today is that pieces of paper are still floating around like confetti. But unlike at a wedding, no-one is celebrating these thousands of pieces of paper. So why do organisations continue to put up with so much paper costing them time and money?

Paper has a habit of spawning extra work that is unnecessary. Take for example the dreaded paper form. The vast majority of customers despise filling them in. As soon as you hand a paper form and a pen to a customer, they look at you as if you’ve emerged from the Dark Ages. Customers today want things done on the terms that they choose, whether it’s by phone, on a smartphone, in person, on the web or via social media.

But it’s not just a bad customer experience that paper creates. Paper creates huge inefficiencies further on in the process. As soon as a customer has entered all the details on the paper form, a staff member has to type those details into a system. Usually this is a 10- or 15-minute piece of work that costs the organisation money and is prone to manual error when it’s completely unnecessary. If the data had initially been captured by electronic means, the consequent work (and risk of errors) would have been eliminated. Those manual errors create further work and inaccurate data which cost the organisation more money and further irritate customers.

So where does the paper go next? Into a file, and that file has to be stored somewhere, usually for a set period of time due to regulatory issues. Filing costs money. The time to put the paper into the file costs money, and indeed, if that piece of paper ever has to be brought back out of the file again, that also costs money.

However, it’s not just data entry and filing that is a curse. Amazingly some organisations are still encouraging staff to work on paper in order to keep physical records that they can refer to later!
TALES FROM THE REVOLUTION...

One of the largest insurance broking firms in the world was being swamped by paper. Senior brokers were spending hours a day reading documents then printing hard copies and filing them. There were literally hundreds of pieces of documentation on each broker’s desk. It was a job they hated. They would much rather spend their time selling insurance than chasing paper. The extra time required to manually print and file the paper was eliminated by implementing intelligent systems that automatically scanned and categorised them. This resulted in cost savings of $4m per year.

START YOUR REVOLUTION

To free your organisation from the paper chase, firstly assess how much money is being spent on both filing and archiving. Next understand (from a legal point of view) what doesn’t need to be archived and clearly communicate this within your organisation. Next assess your system’s capability to try to capture data at the point of first contact and re-use that data throughout the process to eliminate the need to enter data more than once. An electronic content management or workflow solution may be an easy business case to prove if your paper usage is high.

If your organisation is already using electronic content management tools, be sure to compare the agreed process with current usage to identify if staff are actually following the process. This can highlight inefficiencies and help to identify whether staff need further training to be able to use the tools effectively. Also, compare the current capabilities of your system with newer software tools to identify if the functionality is limiting your organisation. It may be time to look at some options in the marketplace that can make a paperless environment stick.

Paper triggers a slew of wasteful processes that cost organisations money. What’s worse is that pieces of paper floating around in organisations get lost. They represent another point in the process where things can go wrong for customers. It’s time to end the kind of conversations with customers that go “We haven’t received your form” or “It must have gotten lost in the mail”. It’s time to cut paper for good.
THIS SOUNDS LIKE MY ORGANISATION

☐ A Lot  ☐ A Little  ☐ Not At All
HALT THE CONVEYOR BELT
The Division of Labour has shaped organisations into large, complex machines with specialist roles, multiple divisions and branches. But not every organisation operates like a manufacturing business with a conveyor-belt that moves widgets from A to B into the customers’ hands.

Indeed, there has been a huge shift over the last 50 years, from manufacturing to service industries. Organisations are still using techniques (e.g. process improvement methodologies such as Lean Six Sigma) to improve manufacturing, and are also using these techniques to improve those in service industries. Service organisations don’t operate in a conveyor-belt fashion. They are focused on knowledge work, which, by its very nature, is unstructured.

Many people love to draw simple process diagrams with a series of steps connected beautifully. The reality is that interactions between customers and staff in service industries look more like a plate of spaghetti and exceptions to the process constitute a large amount of the work. Where organisations get into difficulty is when they try to build rigid, linear processes for work that by its nature requires greater flexibility. As a result customers become frustrated by being forced to follow processes that do not align with the experience they want.

**TALES FROM THE REVOLUTION...**

On paper it’s easy to map out a home loan process: customer application, checking documents, assessment, valuations, approval. The reality is often somewhat different. There is the to-ing and fro-ing of gathering the different documents, the discussions with mortgage brokers and the stressed customers’ requests for updates so they don’t miss out on their dream home! All of these exceptions to the straight-through process make the process more complex, time consuming and costly.

Customers will choose to engage with the organisation in the way that suits them best at that specific moment in time. Where this becomes problematic for many organisations is that they often analyse and improve processes by channel in isolation e.g. a customer calling the organisation by phone. Thus when a customer
tries to switch channels and continue the process, the customer experience often falls apart.

Good process design involves assessing all the possible permutations and creating seamless transitional paths between channels, as well as understanding the impact that exceptions have and the additional work generated.

**START YOUR REVOLUTION**

To change conveyor-belt thinking, firstly understand all the channels that customers use then highlight the interactions in the process where customers are likely to switch channels. Put steps in place to enable the seamless transfer of customer information at these interaction points.

Next, look to transform your current process from the ground up by challenging everything you do. Invest in technology that centralises all information about the process so that any staff member from any channel can handle the required work. Change team structures to a process-based, customer-outcome focused approach to minimise customer experience impact via channel swapping.

Then, take your processes to the next level by using data to identify how to give the customers what they need faster and by predicting future behaviour. Explore emerging digital channels to give customers an easier way of doing business with your company before they even know they need it.

*Organisations need to stop thinking of their processes as a conveyor-belt that moves swiftly from A to B, and stop to consider how to manage or eliminate exceptions to the process.*
THIS SOUNDS LIKE MY ORGANISATION

☐ A Lot  ☐ A Little  ☐ Not At All
Understand

CUSTOMER EXPERIENCE IS THE PROCESS
Everything is a process – but what is the difference between customer experience and business process?

Customer experience refers to every experience that the customer has with an organisation, whether it is interacting with them, using a product, or even before they’ve purchased a product or service from a company. These are all part of the customer experience.

Customer experience is about *emotion*. How does a customer feel when interacting with your product or service or even researching before they purchase? The customer experience is also about effort. How much effort do they have to put into the interaction with the company as part of the initial buying process or as part of the ongoing process? How satisfied or dissatisfied is the customer with the interaction?

Too many companies today think of process as starting within the walls of the company at the first interaction point with the customer, and ending with the customer receiving a product or service. But the customer experience is broader than this. Typically, the customer experience happens even before the organisation has thought about it occurring. But it’s this blinkered mindset which is stopping organisations from expanding their businesses, providing new products and services and innovating.

**TALES FROM THE REVOLUTION...**

*A technology company was providing analytics to their customer about the performance of the equipment that they had supplied. It was only after they mapped the process with the customer that they identified that customers didn’t know how they could use the data. The company realised that they could provide a data analytics service that would help their customers to proactively resolve impending issues. The company made extra money selling the service and customers were delighted to be able to prevent costly issues.*
This clearly shows the results that a customer experience approach to business process can bring. Process isn’t as simple as having the customer’s money in the bank and a product (or service) in their hand. A continuous approach to understanding the experiences of customers can be a competitive differentiator and a source of additional profits.

**START YOUR REVOLUTION**

To kick start your customer experience analysis, focus on creating customer touch-point maps clearly showing every interaction a customer has with the organisation and who they are interacting with. Next, undertake research with different customer groups to identify both the good and bad aspects about each interaction and which interaction points they value most highly.

Rate the impact each of those interaction points has on the customer experience – this can be as simple as a 1–10 scale. Sum all of the scores to create an overall customer experience score. Next, rate the organisation’s current performance against each of those scores. Create a plan to improve each customer touch-point, starting with those of highest impact. Re-measure the customer touch-point performance to gauge your progress.

Once you’ve set benchmarks for the improved process, conduct further research and analysis with your customers to identify opportunities to expand your services beyond what was traditionally thought possible.

*Organisations today don’t have the luxury of dropping their guard. If they fail there are plenty of others who are waiting to take away their market share. Customer experience is a differentiator – it broadens the relationship with the customer, cements loyalty and increases purchases through a broader canvas of products and services.*
THIS SOUNDS LIKE MY ORGANISATION

☐ A Lot  ☐ A Little  ☐ Not At All
MAKE THE CUSTOMER EVERYONE’S CUSTOMER
Can every staff member in your organisation articulate what their role contributes for the customer? Sadly, many staff (particularly in “back-office” functions) feel a total disconnect from the customer. So how can these employees be helped to understand the critical link they play?

An accounts payable clerk never deals with customers and has probably never even seen one! So how do they contribute to customer outcomes? Their capacity to process payments means that the purchasing process is a speedy one and products are available to staff when they need them. Staff receive the products to enable them to do their jobs effectively and deliver outcomes for customers. These staff support customer-facing roles.

It’s this thinking that cements a customer-centric mindset throughout the organisation. When staff are committed to providing value for the customer, they don’t let roadblocks get in their way.

When staff are focused on the end customer need, they start to question activities that are not in the best interest of the customer. Defining how every staff member’s role contributes to value for the customer and rewarding positive behaviours is a great starting point for the creation of a customer-centric culture.

**TALES FROM THE REVOLUTION...**

A government department was having problems retaining staff. Analysis of the process revealed that when joining the organisation many of the staff had no computer to use for several days. The IT security policy stated that they were not allowed to use their personal laptops on-site so they were often forced to sit around reading documents instead of doing work that added value to customers. These staff were placing numerous calls to IT staff, purchasing areas and gatekeepers of the process – all which proved fruitless. This created an “induction crisis” for new staff who felt under-utilised and unimportant.

There was no linkage of responsibility from the IT staff through to the customer. To contribute improvements to the customer staff required the tools to do their jobs. There were no service level agreements (SLAs) around the issuance of the IT equipment and therefore no repercussions for not achieving it.
The customer is the reason that every role in an organisation exists. If staff within organisations can’t explain what they do for the customer and the criticality of the steps between themselves and the customer, then it’s time to question why their role exists. No matter how far away from the front-line a staff member’s role may be, everyone should be able to quantify how their role contributes to a positive experience for the customer.

But what about “internal customers”? An internal customer is one where a staff member supplies a product or service to another staff member or another team. But ultimately, all of this is done to benefit the end-customer.

**START YOUR REVOLUTION**

To cement customer-centric organisation design ensure that new roles created have clearly defined customer outcomes. Continually review SLAs and defined customer outcomes to ensure that they are optimised for the customer.

Next, get back-office “support” staff involved with designing customer-facing processes to help them to understand the criticality of their service to internal customers. Collaboratively work to define measurable and practical SLAs that support customer-facing staff.

Consider starting an organisation-wide program to define the different customer types that are served by products and services. Paint a picture of your customers by building personas and help staff to define how their individual roles contribute to customer outcomes. Link these outcomes to their job descriptions and key performance indicators.

Finally look to visually represent how each process’s customer outcomes contribute to the overall value to each customer type. This can be an effective way to communicate the power of process improvement to the organisation’s leaders.

*Customers are the reason that organisations exist.*
THIS SOUNDS LIKE MY ORGANISATION

☐ A Lot  ☐ A Little  ☐ Not At All
OUTSOURCE ALL OR NONE
Over the last 20 years, outsourcing has given large organisations the opportunity to take parts of their business processes and move them around the world in the pursuit primarily of cost savings. It can be argued that this has been effective at reducing costs – but at what expense?

Often customers complain that they’re dealing with someone overseas who doesn’t understand them or the products they are dealing with. Customers feel like they are being ill-treated by a tangible drop in service standards at the pursuit of greater cost savings. Hearing a foreign voice on the end of the line is enough to make customers dread what is about to follow.

By failing to take responsibility for critical parts of the process customers are being cheated on a daily basis. In many cases the pursuit of short-term cost savings is providing a customer experience which is negatively impacting the patronage of companies. Customers are leaving because they feel that the organisation doesn’t care about the service they are providing to them.

Outsourcing also increases work hand-offs between teams as the segregation of the facility often creates the need for work to be passed to and from the outsourced facility. This commonly results in increased delays and increases to work. Consequently more time-consuming processes create dissatisfied customers. So are those cost savings really worth it when you’re losing customers?

**TALES FROM THE REVOLUTION...**

*Dell had a brief foray into outsourcing that ended poorly. Having outsourced contact centres to India they found that customer satisfaction was rapidly decreasing as customer service staff were unable to answer questions that were not included on their scripts. Dell realised that a cost saving was not worth losing customers over and changed its outsourcing strategy before the damage became irreparable.*
START YOUR REVOLUTION

Begin by compiling a list of processes within your organisation and assessing those with minimal customer touch-points – these are key targets for processes that can be outsourced. Next, assess those processes to identify how many teams are involved with delivering the process outcomes – the more teams are involved the more difficult the process will be to outsource. If you are considering outsourcing a portion of the process, consider the impact that this will have if teams handing off work to each other are in different locations or time zones. Often it can be best to “lift and shift” an entire process rather than cutting it into outsourced pieces. Above all else, consider the customer experience. If the change negatively impacts the customer experience, don’t do it.

Outsourcing in some circumstances can be a good thing – there is no doubt that there are many sound examples of this when the focus is on improving the quality of the customer experience. But organisations are now wising up to the fact that outsourcing core parts of their processes for the solitary pursuit of cost savings on many occasions has been a big mistake. It’s time for organisations to take a good hard look at their outsourced arrangements to determine whether the cost savings are really worth it for the long term.
ESCAPE
the Organisational Island
When was the last time your CEO talked to a customer? When was the last time they answered a phone call or even shook hands with one? CEOs and executive staff often live on an “organisational island” where they are detached from customer interactions.

During a presentation the CEO of a major insurance company started talking about some of their lower value customers as “rats and mice”. Yes they were lower revenue-generating customers, but he had forgotten that their volume made them a very important part of the growth strategy of the company.

Executives are often unwilling victims of their own organisational structures. They’ve become so far removed from customers that they often lose touch with what is happening. But it’s not just executives. When was the last time some of your mid-level managers actually talked to a customer or heard a customer complaint or used one of the products or services that you sell? Are you using your own products and services or are you using the competitors?

**TALES FROM THE REVOLUTION...**

In TV series “Undercover Boss” senior executives of large organisations are placed in low level jobs within their organisations to help them to understand the challenges of front-line positions. Most are dismayed and shocked at what goes on and are quick to make changes to help employees and customers. Amusingly the COO of chain store Family Dollar was fired by his own employee for being “incompetent”!

How many CEOs and executive staff today have the courage to do the same thing? Will they be terrified by what they see at the front-lines of their organisations?

It’s important to clearly define how senior managers in organisations contribute to customer outcomes. It’s easy to become awash in a sea of strategy, tactics and planning and to forget what it’s like to be a customer.
To help your executives connect with customer experiences at the front-line get time at least once a quarter to talk to the senior managers / exec of the organisation. These sessions should be focused on real life examples of where customers had particularly bad experiences and what the organisation is doing to fix them. This helps to bring things to life for those that are disconnected from the front-line. Try using call recordings, mystery shopper videos or even bringing in customers to talk about their experiences.

Next, get everyone at the senior level from the CEO down to do a “back to the frontline” day so that they can understand intimately what staff have to deal with.

Finally, consider having a “customer experience day” where anyone from the company who is involved with customer experience can get together to discuss how they can help each other and co-ordinate ideas.

The impact that real customer experiences can have on organisational leaders can be profound and provide the required impetus to spread a customer focus throughout the organisation – but only if adopted as an ongoing approach.
WEAR DIFFERENT
CUSTOMER
HATS
Organisations today often think of a process as having a start and an end, with a series of tasks in the middle that help them to achieve an end result. They are often guilty of thinking of one process and one customer passing through that process conveyor-belt style.

**TALES FROM THE REVOLUTION...**

An insurance company had gone to great pains to build a fantastic process. They were running a sales call centre which was doing extremely well selling insurance to seniors – their key target market. They had a wonderful call script and process for converting those customers, but when someone called up who wasn’t in that target group, they tried to sell to them like they were a senior and their sales conversion rates plummeted. They failed to think about their business processes as having multiple customer types flowing through them.

Now ask yourself this question, “Are all of your customers the same?” Of course not. If you were to describe your customers as several distinct types with different demographics, personalities, names and jobs, how would they each react to going through the same process?

One of the most common mistakes made with processes today is seeking a standardised generic process for everyone. In today’s age, customers will not accept being treated like a number. Customers want the security of big business but they want personalisation to go with it. The challenge is how to balance the two. Many organisations are good at acting big, strong and proud – but how do you get down to details and make your customers feel loved and special whilst still keeping your processes consistent and manageable?

**START YOUR REVOLUTION**

Organisations need to understand each step of their processes and understand how each of the different customer types react, positively or negatively as they pass through each stage of the process. Obviously, you can’t understand every single
type of customer that you have but by segmenting those customers into your key target groups and understanding how they feel going through the process you look at the process in multiple dimensions. Give them names, draw pictures and get inside the head of your ideal customer (personas). Live in their shoes for a day.

From this approach a standardised, generic skeleton of the process can be created. Add to this skeleton the flesh and bones of customised approaches to your common or ideal customer types and you start to create experiences that build rapport with your customers and strengthen their loyalty. Don’t be afraid to change the process to suit each customer type. You may end up with 6 or 10 different process variants, but those processes will be tailor-made and will delight your customers.

The next time you look at improving a process, take each customer type and interrogate the process as if you were them. It’s time for your organisation to try on a few different customer hats.

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**THIS SOUNDS LIKE MY ORGANISATION**

☐ A Lot ☐ A Little ☐ Not At All
SWITCH OFF THE ROBOTS
Customers are instantly annoyed when they call a company and hear the automated words “Thank-you for calling ... your call is important to us ...”. They hate dealing with Interactive Voice Recording (IVR) systems, yet companies are still continuing to inflict suffering on their customers. Why?

It’s because companies are continuing to put themselves before their customers – the IVR is not convenient to the customer – who just wants to speak to a person and get their problem resolved. The IVR makes it easier for the company who structures their teams to fit neatly in line with each of the numerical options.

**TALES FROM THE REVOLUTION...**

Research with customers of a transportation network revealed some interesting stories ... The customer was sitting in the phone queue and the robot spoke to them. “You’re number 72 in the queue, your call is important to us. Your estimated wait time is 21 minutes”. 21 minutes! The customer hung up.

“If I was important they’d at least have a few extra staff to answer calls. If I really was important I wouldn’t be sitting pressing numbers into an IVR with a hundred prompts for things I don’t care about – designed for your convenience, not mine. If I was important a human would have answered my call. If I was important they’d have designed a system where I didn’t have to call as they’d have noticed a change in my behaviour. They’d have called me, begging for my custom and asking what they could do to help. But they didn’t – and they lost me”.

**START YOUR REVOLUTION**

If switching off your IVR system seems like too big a first step, a good starting point is to re-test the setup of your call routing options. Create scenarios and test them with customers. Time how long it takes them to select the options and whether they select the correct ones.

The next step is to reduce the number of IVR options to 2–3. This will involve a concerted effort to cross-skill staff so that they can answer a broader range of call
types. Ensure that staff are accurately capturing the reasons for the calls so that preventative measures can be put in place to resolve problems before the customer decides to pick up the phone. Often categories used to capture the call reason are too vague to be useful.

The final step is to switch off the IVR completely. Calls can still be recorded and categorised, but the impact of coming through to a real person to answer the call will have a dramatic impact on the customer’s experience. Being one of the few companies to switch off the robots will also provide you with a magnificent excuse to sound your customer-focused trumpet and put your competitors to shame! The alternative is to provide customers with two separate numbers – one for a fully automated system, the other where they can talk to a human. Measure usage and satisfaction of both over a period of three months with a view to eliminating the underperforming option.

_In this new age of customer experience the tables have turned. For nimble, hungry upstarts that are eating away the market share of their lumbering competitors there is no number 72 in the queue. There isn’t even a queue._
A further result of the Division of Labour was the creation of an organisational split into what became known as “front-office” (customer-facing) and “back-office” (administrative) roles.

As a result organisations have created structures where they have front-office roles passing work to back-office roles to be completed, and then those passing it back to front-office roles again. They’ve created this construct to try to make things more efficient – the theory being that the division of labour speeds up specialised work. But in return, they’ve actually made things worse for the customer.

Customers often become frustrated when dealing with someone on the phone who advises them that their request will be submitted to another team for processing and that they’ll get back to them “within X business days”. Customers don’t understand why these constructs need to exist. In an “always on”, “everything now” world, customers will take their business to those organisations that solve their problems on the spot. Customers today want one single point of contact to do the work (and do it now).

**TALES FROM THE REVOLUTION...**

Not content with having both a front-office and a back-office a Singaporean bank took things to what they thought was a logical next step – a “middle” office that handled the administration between back-office and front-office! After realising that they were crippling their customer service with additional complexity (and consequently delays) the organisation is now desperately trying to remove the middle office function.

So how do organisations solve a centuries-old dilemma? How can they change to a new business model that will allow their customers to have a better experience?

**START YOUR REVOLUTION**

Much of back-office processing consists of basic administrative tasks that, in many cases can be eliminated through process automation and to enable those
staff at the frontline to perform a combined back- and front-office function that the customer needs. Customers don’t mind things taking a little bit longer at the front-line as long as their needs are resolved by a single interaction. The focus should be on automating low-skilled back-office functions, thereby freeing up capacity for customer-facing roles that can add to the customer experience and increase the amount of products per customer. Key indicators of work that can be automated include the use of paper forms, checklists and email as a means for staff to complete work.

The world has changed and to remain competitive organisations must seek to eliminate the back-office so that they can provide better customer experiences at the front-line.
FIND THE STRAW THAT BREAKS THE CUSTOMERS BACK
Imagine you’ve just secured a new customer who has very excitedly purchased your product or service. They’ve got something that they needed or wanted and now they’re going to use it to make their life a little bit better. It’s a bit like opening up a bank account and making the first deposit. They’ve made an emotional commitment to use your business.

Every time you do something positive for that customer, (e.g. a great customer experience, great customer service, creating a new product that they want), the balance of satisfaction increases, but every time you do something wrong (e.g. when you annoy a customer by poor service or by not making a product that they want or by making things hard for them), the balance decreases.

Every interaction with a customer is an opportunity – a unique moment in time where a deposit can bolster satisfaction or a withdrawal can deplete it. In dealings with customers, organisations must always try to measure the level of satisfaction of interactions and look at the overall balance of positive and negative. By understanding this fragile balance they can start to look at ways in which they can optimise steps in the process where a customer interaction occurs. Conversely, in the unfortunate situation where a negative interaction occurs, organisations have the ability to take steps to add positive satisfaction to the account.

**TALES FROM THE REVOLUTION...**

Appliance manufacturer Sunbeam realise that when a customer makes a complaint online they should take steps to rectify the complaint immediately. They have dedicated staff that monitor websites for negative reviews and they respond rapidly to the customer, offering them substantial discounts off of another Sunbeam appliance. They take action rapidly to try to turn a negative into a positive.

There’s a point in which a customer decides to leave an organisation due to a decline in satisfaction (there can, of course, be other reasons for leaving a company’s patronage, but a decline in satisfaction is a key one to remedy). The customer interaction immediately before that point is “the straw point”; it’s the straw that...
breaks the customer’s back! The customer decides enough is enough and takes their business elsewhere. So how can organisations prevent their customers from reaching the straw point?

**START YOUR REVOLUTION**

When looking at business processes, it’s important to identify all of the customer interaction points that happen in the process. Of course, not all interactions are created equal. There are some obvious negative interactions that rapidly deplete the balance – complaints and even suggestions can be indicators.

Organisations can assess the impact of interactions with the customer on a simple scale of high, medium and low. If they have a customer interaction that has a high rating, if that point in the process was to fail, there’s a high likelihood that the customer would leave or be severely impacted in terms of customer satisfaction. If they were to have several of the medium-impact customer interaction points going wrong, this could also lead to the termination of the relationship.

Small, negative interactions are an insidious problem – often unnoticed until they build up to a point where the bank is empty and the customer leaves before the company can do anything to turn things around. Organisations need to understand the impact of every customer interaction point, and if customers have a negative experience at one of those customer interaction points, organisations need to be able to top up the level of satisfaction or lose the customer eventually.

Each customer interaction point should be analysed and optimised by a combination of assessment against the key customer types as well as customer satisfaction data captured immediately after the interaction. Organisations should seek to supplement this data with their own ratings of interactions with the customer (not just face to face, but through all channels). This data gives the organisation the ability to take corrective action to increase satisfaction and to take action to proactively prevent drops of satisfaction that are yet to occur.

Sadly many organisations fail to top up the customer satisfaction after a point
in the process where they are unhappy. It doesn’t take much, and if a customer gets
to the point where they are making complaints or raising issues, it is clear that the
customer is approaching the straw point.

*If the bank is empty the customer leaves. But there is a worse fate – a negative
balance creates a customer who proactively seeks to damage the organisation. This
customer feels wronged by the organisation and will seek retribution. This is a
genuine worst case scenario and is the true antithesis of a customer-experience focused
organisation.*
DON’T
OVER-SERVICE YOUR CUSTOMERS
The servicing balance applies to every organisation. Recently, there has been a trend for organisations to over-service their customers. Companies, in a desperate attempt to curry favour, are killing their customer relationships with kindness.

**TALES FROM THE REVOLUTION...**

Customer research with a telecommunications company revealed that a customer made an enquiry with the company regarding a late charge on their bill. Even though they ticked the “Contact me via email” option they were immediately bombarded by phone calls, voicemail messages, text and several emails – all for a $15 charge! After they recovered from the customer service bombardment they had to spell it out to them in simple terms by asking them to “...refund the $15 charge and you don’t need to contact me again...” The telecommunications company did so and the customer was finally able to get on with their life!

Some may say that this organisation was just trying to do the right thing, but they failed in the balance of servicing their customers – they over-serviced and irritated the customer. The research showed that this put the customer off interacting with them in future, including buying additional products.

**START YOUR REVOLUTION**

To get the right service balance, look at the number of interactions that customers have across different processes and try to minimise them where they relate to a negative experience e.g. a complaint.

Next ensure that the customer can track status in the manner they wish to and in real-time – this avoids unnecessary follow ups that generate further work for the organisation and amplify the customer’s frustration.

Finally, understand how your customers want to be communicated with and communicate via their channel of preference. Communication should not be a shotgun approach via all channels.
More interactions are not necessarily beneficial for building customer relationships – the key is the right kind of interaction, at the right time where the outcome is focused on a positive one for the customer. It’s about quality interactions, not quantity.

**This sounds like my organisation**

- A Lot
- A Little
- Not At All
STOP GIVING YOUR CUSTOMERS AWAY
It’s the ultimate irony of big business today that organisations spend so much trying to attract customers only to give them away so freely.

The reasons for this are clear – staff are disconnected from the customer experience. They have become robotic and unable to think outside of the confines of restricted roles. They have no incentive to try to keep a customer. They just do their job and think, “It’s not my problem”. What’s worse is that the neglect shown tells the customer that they are not valued.

There is, of course, the polar opposite approach of making it almost impossible for the customer to cancel or locking them into long contracts. This is an even more damaging approach as customers become so irate that they will take to venting their opinion to anyone who will listen.

**TALES FROM THE REVOLUTION...**

An assessment of an insurance company’s retention process revealed that there was no attempt to retain customers who were intent on cancelling their policies. After a confirmation of dates and a few clicks customers were simply told, “That’s all done for you, you’ll receive a refund of your policy by mail … thank-you for calling …” There was not a single attempt to encourage the customer to stay nor any research conducted into why the customer would cancel the policy.

There’s no excuse for giving your customers away and every organisation today needs to do their best to keep them. So how can today’s organisations stop giving customers away?

**START YOUR REVOLUTION**

The first way is to understand and track the impact of every customer interaction on their levels of satisfaction. This data can be used to predict those customers veering towards being lost, thereby allowing the organisation to proactively massage customer satisfaction to turn the customer around before they make a decision to leave.
The second is to establish clear responsibilities for customer-facing staff on what they need to do to try to keep a customer. Often organisations have separate retention teams to do this, however, this can result in an unhappy customer being passed onto another department and being subjected to an additional wait or breakdowns in communication. This isn’t an ideal way to treat an already unhappy customer.

The third is to give all customer-facing staff the autonomy to resolve any customer issues (e.g. compensation) without having to jump through hoops.

Take the example of the Ritz-Carlton where any employee is authorised to spend up to $150 per guest to resolve any issue without question. No excuses, no “I’ll have to ask my manager”. The issue is resolved rapidly to create a seamlessly positive customer experience.

*The best form of cure is prevention, but if a wounded customer knocks on your door it’s up to the organisation to do everything they can to heal them.*
OBLITERATE

OVER-STANDARDISATION
Process standardisation is still very much on the agenda for large organisations, and it makes complete sense, to a point. Whilst the standardisation of process can reassure the customer that they will receive what they are expecting, making processes too rigid negatively impacts the customer experience. Customers don’t want to be served by (or treated like) robots.

**TALES FROM THE REVOLUTION...**

_The most famous example of predictability negatively impacting customer experience is McDonald’s famous robotic upsell “Do you want fries with that?” McDonald’s did have an upsurge in sales but became a figure of ridicule in the media when customers realised that they were being asked the question no matter what product they were buying (think fries with an apple pie!). McDonald’s later dropped the strategy._

How many times do customers interact with a company and receive a standard robotic response? How many times do customers call a company to receive a recorded voice saying, “Your call is important to us”?

The over-standardisation of processes has created a stagnant customer experience that only benefits the sterile, internally-focused organisation in the short-term.

**START YOUR REVOLUTION**

Customers today demand both personalisation as well as the economies of scale. If your business can only do one of those you’re not in the game. Customers are no longer willing to put up with what they call “big, faceless corporations”. They want authenticity and personalisation.

To get started on the path of personalisation you need to know your customers, and that means data and analytics. Data provides insight into past data and can be useful to understand historical trends – but the real magic is in having the capability to predict your customers’ future needs. If you can show your customer
that you know what they want before they’ve even thought about it, you’re on your way to creating customers with sticky loyalty. If you continually take a generic, shotgun approach the organisation will rapidly slide down a path of irrelevance.

Staff need to be able to build connections through the use of customer data whilst smart systems predict what the customer needs at the opportune moment. Generic, mass market advertising and bland, standardised processes have had their day.

This sounds like my organisation

☐ A Lot ☐ A Little ☐ Not At All
DO WHAT YOU DON’T DO NOW
If you’ve been selling the same product or service for decades, it’s hard to think of doing anything else. But companies today have to look beyond their core products to strive for something new or else face obsolescence; your flagship products won’t sustain you forever. Ask yourself, “What business am I really in?” If you’re in a service business, look beyond your core services to identify how you can build a broader relationship with your customers. Stand in the customer’s shoes and understand what the customer is feeling about your product or service.

It’s often very easy to stick to the safety of a product that has been selling well for so long. It’s provided great revenue for your company and it seems like it will never die. But if time tells us one thing, it’s that all good products come to an end. This is why it’s absolutely critical to explore opportunities for new products and services that may seem initially to push you outside of the range of your core products.

**TALES FROM THE REVOLUTION...**

Kodak thought they were invincible. They wanted their business to continue along the same path in perpetuity. A bright spark at Kodak invented the digital camera before everyone else, but Kodak simply asked him not to tell a soul about it. When competitors invented the digital camera Kodak was on a path of economic decline. They were locked into a business model that their culture couldn’t move out of; they stuck to their core and ended up with a rotten apple.

**START YOUR REVOLUTION**

Analysing the entire end-to-end customer experience should be a key starting point in expanding into complementary products and services. This involves really taking the blinkers off and looking at customer behaviour. Too many businesses look at the behaviour of their customers solely from the perspective of the buying process and into usage of the product and they fail to look at aspects of the customer’s life that they could be enhancing. Ask how you can make your customers’ lives easier and more enjoyable.
When Breville built their state of the art coffee machine they realised that making a great coffee wasn’t enough. When they looked at customer behaviour they realised that customers disliked having to wait for the coffee machine to heat up – so they designed a built in timer that would automatically switch on the machine at the time they wanted. Breville focused on creating a product that would enhance lifestyle, not just create another coffee machine.

Organisations today must look at the entire end-to-end customer experience to identify opportunities where they can expand. They must encourage staff to be innovative, to constantly look for needs in customers and respond to those needs. Every complaint, every suggestion, every piece of feedback provides an opportunity to get an insight into customers’ minds and to look at new products and services that can be delivered to satisfy those needs or wants (or even the needs and wants that the customer doesn’t realise that they have yet).
FOCUS ON WHY?

NOT WHAT
In his famous TED talk, author and speaker, Simon Sinek, explains that, “People buy from you not because of what you do but Why you do it”. In today’s day and age it isn’t enough to only create a great product or service. The Why creates a connection with customers.

To make the leap to creating an incredible connection with your customers, you must engage with them by helping them to understand your Why.

**TALES FROM THE REVOLUTION...**

Education provider Entrevo, which runs the World’s #1 personal brand accelerator program “Key Person of Influence” could quite easily describe what they do as “training for entrepreneurs”. Instead, they articulate their Why by explaining that they are building “A world full of entrepreneurial people solving meaningful problems”.

People buy from you when you create products and services that come alive because of Why you do it. This is a competitive differentiator in today’s world.

The customer experience means that people want to know Why you do things. What’s your reason for being? How are you contributing to the world? In a world where there are a multitude of products that do the same thing, what will set yours apart from the competition? The answer is in the Why, not the What.

**START YOUR REVOLUTION**

Ask yourself what your organisation wants to be known for? Focus on the bigger picture. Tell stories that explain your Why and communicate those to the world. Be genuine about everything you do and what you stand for.
THIS SOUNDS LIKE MY ORGANISATION

- A Lot
- A Little
- Not At All
START WITH THE END IN MIND
There’s nothing more inefficient than making work efficient when you shouldn’t be doing it at all. Organisations often fall into this trap when they look to improve processes. They are often successful in their efforts only to realise that they’ve been focusing their efforts in entirely the wrong direction.

The key to great process design is to make sure there is alignment between the outcome for the customer and the work being done in the process. Therefore the logical approach is to first clearly define the outcome sought by the customer.

**TALES FROM THE REVOLUTION...**

30 years ago customers would browse the shelves of record stores. Fast forward 30 years and record stores are now an almost complete relic of a former age. Customers now predominantly buy music digitally (e.g. via iTunes) and can sit in the comfort of their own homes, browsing music then purchasing and downloading it instantly. The outcome of the process remains the same – enjoying music. But the process itself has become simpler, faster and more enjoyable. Technology has acted as an enabler, but this also required some customer-centric thinking to get the mix right.

So what are the lessons from a process point of view?

**START YOUR REVOLUTION**

Firstly, think about what the outcome is for the customer; in this case, did they want to buy a record? No, they wanted to buy music (think iTunes).

Next, think about how you can make their life easier – they don’t need to travel to a store where there is limited stock (think Amazon).

Finally think about how you can make things faster – they don’t need to spend time browsing a store or fumbling to pay, they want it now!

*The outcome may remain the same, but if the focus is on the customer experience of the process, the customer gets what they really need, not what the organisation thinks they want.*
THIS SOUNDS LIKE MY ORGANISATION

☐ A Lot  ☐ A Little  ☐ Not At All
LOOSEN THE PROJECT MANAGEMENT Noose
For decades now the discipline of project management has been growing in popularity. At the end of projects customers and businesses are more often than not disappointed by the end result. Instead of getting better at project management, why is it that organisations seem to be spending more money on projects and getting slower at delivering them?

Organisations have taken the same approach of increasing complexity in project management as they have done to the structure of staff. Previously a project manager and a team would deliver a project. Now there are program managers, portfolio managers, analysts, co-ordinators and steering committees (to name just a few). Is it really a wonder that projects are taking so long and not delivering what the business wants, and more importantly not delivering what customers really need?

In big business today, every new change seems to end up as a project and by its very nature becomes bigger than it needs to be. This highlights the fundamental flaw in project management: why are so many small ideas and tasks turning into projects? It is commonly due to senior staff failing to trust that employees can execute the change without an overarching framework of control. As a result a disproportionate number of staff become involved in the decision-making process (which grinds to a halt until everyone is deemed happy). Staff don’t have the freedom to make changes as they see fit.

**TALES FROM THE REVOLUTION...**

A multi-national firm in the financial services industry kicked off a $15m project to transform the organisation. They rushed out to hire a team of analysts, developers, co-ordinators, project managers and program managers. The analysts were given work by the project managers who took instructions from the program managers who took instructions from the project director who took instruction from the executives who took instruction from the CEO. As no-one on the project team was empowered to make critical decisions, approvals passed back and forth up a long chain of command, causing unworkable delays. Whilst this happened the 5 project managers made their staff report on everything they were doing in order to justify the decision-making being passed backwards and forwards. No work of value could be done. The project was shut down after an unproductive 12 months leaving a multi-million dollar black hole.
The command-and-control culture of the past 200 years still exists, but it is not fit for purpose in an age built for speed and agility of business. Project management needs to be turned on its head in order to start delivering rapid change.

So should they throw out everything they have learned from project management? No, there has to be balance between the old and the new.

**START YOUR REVOLUTION**

Start by creating rapid delivery teams of no more than 6 people. Set them clear objectives and delivery dates and give them the autonomy to meet those objectives in whatever way they can. Ensure project managers keep their distance.

For larger projects, resist the need to document everything. Strip back project management to a minimum. Hire capable project managers that report directly to decision-makers. Strip hierarchies of decision-making from your projects. Consign program managers and paper pushers to the exit door.

Finally, introduce a continuous improvement framework. This helps to eliminate the need for time-consuming and costly projects. Staff need to be given the freedom to make change in the areas where they are responsible for the customer experience without the bureaucratic overhead of a project methodology.

*Project management is a tightening noose that is slowly strangling organisations and it's time to cut the rope.*
BE PROLIFIC NOT PERFECT
Many organisations are on the search for perfection that will never come. Projects are enslaved by staff who want perfection before they can move on to the next stage of a project. This is the result of an old-school mindset which says that everything has to be planned, documented, and finished to perfection before it can move to the next project stage. Delivering part of a product at the right time is preferable to delivering a perfect product when the customer no longer needs it.

**TALES FROM THE REVOLUTION...**

The classic example of prolific beating perfect is the concept of the Minimum Viable Product (MVP). Cloud-based storage provider Dropbox amassed huge subscriber interest with an incomplete product demoed via video to the world and Pinterest had customers queuing up when they only had a landing page with a sign up form.

It’s time for organisations to embrace practical, incremental approaches to new product development which deliver value to customers when they need it. The world is changing at such a rapid pace that perfection is a pointless goal. Businesses are cursed by analysis paralysis and over-planning. It’s action that gets ahead of your competitors, not plans.

**START YOUR REVOLUTION**

The first step to delivering is to banish the concept of a finite project end date where a product is brought into the world like a newborn baby. Instead focus on a series of staged releases with the minimum viable product as the first iteration. Think of it like building a car. Stage one may have an engine, wheels and one seat. Get it on the road, test the ride and incorporate customer feedback to stage 2. If you’re lucky you may sell some at stage one – or you may not. The plan is to iterate as fast as possible to get to a sales velocity where you have profitable traction before the competition even realise what you are doing.
We’re living in a world where change is faster than ever before and perfection simply cannot be attained. Organisations must have systems and processes in place that are flexible enough to change at the drop of a hat. Build the ability to change and the capability to change rapidly. Prolific beats perfect.
BE AGILE

NOT FRAGILE
For decades now, the exemplification of over-planning and perfectionism has been the use of a delivery method called “waterfall”. Projects follow an excruciatingly slow cycle of gathering requirements, documenting requirements, building functional specifications, building systems and, if they are lucky, implementing something of value to the customer. During the waterfall process incredible amounts of time are spent on making sure that every stage is tested and that there are no flaws. More often than not, what is delivered is substantially less than what was envisioned; something the business isn’t happy with and something that the customer doesn’t really need or which doesn’t meet their expectations.

The problem often is that so much time passes between the concept of the project and the one that is implemented that the world has changed. It’s not unusual for some projects to run for years and by the time they’re implemented, the organisation has been overtaken by their competitors who have delivered their projects in a faster, more agile manner. The waterfall approach to delivery is a relic of a bygone age and is no longer fit for purpose.

**TALES FROM THE REVOLUTION...**

A government organisation had a non-negotiable deadline for project completion (as a new law was coming into effect). The project involved establishing a set of new processes to support the new law. The processes were quickly defined and documented and handed over to IT to build the systems required. Several months later, and no progress to report, a meeting was called to bring attention to this worrying lack of progress. Staff were advised that time was running out and to have any chance of delivering an IT solution by the deadline they’d have to get the stakeholders in the room, work out what the minimum viable product to be delivered was and to work in an agile manner (with high staff involvement) to build that solution as Stage 1. Unfortunately they decided to proceed with a waterfall approach, hiding the impending doom. A few weeks prior to the deadline they admitted they couldn’t deliver the promised IT functionality, leaving them in a panic having to hire extra staff so that they could manually administer the processes. The IT managers responsible were fired in rapid succession.
Those organisations accelerating ahead of the competition are increasingly embracing agile methods of delivery. Is it any surprise that smaller, upstart competitors have been using agile methods as a way of improving their businesses for many years and are already catching up with larger organisations (and in many cases outpacing them).

**START YOUR REVOLUTION**

Get started by quickly assessing whether your delivery teams are using waterfall or agile-based methods. If they are still using waterfall methods it’s time to kick their methodology to the kerb.

Next identify the staff who you believe can transition to agile ways of working – this isn’t just about learning a new methodology, it’s about a way of thinking and working. Some staff may be too deeply entrenched in a perfectionist mindset to be able to transition to the new world.

Finally, invest time and money in training all of your delivery staff in agile methods as well as encouraging adoption of supporting software tools that are designed to get the best from an agile delivery approach.

*The waterfall method’s gross inefficiency coupled with its lack of contact with business users and customers is a dangerous practice. Business today is about embracing the Pareto principle – getting the highest amount of return in the most efficient manner. It’s about building value rapidly, and getting it into the hands of customers before your competition. It doesn’t have to be perfect and it doesn’t have to be the complete solution to the world’s problems delivered in a big bang fashion. Giving your customers a piece of what they want now is a significant competitive advantage to giving them everything they wanted when it’s too late to use it.*
This sounds like my organisation

☐ A Lot ☐ A Little ☐ Not At All
Say Goodbye to Business Requirements
Part of the reason that waterfall is continually failing to deliver rapid, quality output is the approach to documenting business requirements. Now it’s pretty obvious that work has to be undertaken to get from an unsatisfactory current state to a much improved future state, but the current approach to doing this is fundamentally flawed.

The more often you can show the business what the end result will look like, the more feedback you’ll get and you’ll get closer to what they need. Waterfall development kills all of that stone dead – high customer interaction upfront then the project disappears into the IT department only to emerge as a transmogrified beast that no-one wanted.

**TALES FROM THE REVOLUTION...**

A government department had failed to implement a project and attempted to reboot the project a number of months later. The new project team were handed a 750-page business requirements document to critique. It was an unreadable document not only for the project team but for anyone in the business – so complex that it would take months to digest. The requirements document was put in the bin and they restarted the project by splitting the requirements up on a process-by-process basis so that the business could digest the change in bite-sized chunks rather than trying to eat an elephant!

Implementation of a poor customer experience often starts with a laser specific focus on creating phonebook-sized documents of “detailed business requirements”. Reliance on them is a slavery to an old religion of business that needs to end. *Thankfully the end is nigh.*

**START YOUR REVOLUTION**

Instead of spending weeks or even months documenting detailed business requirements, the key is to instead build the system or to prototype the product as an MVP. This can be achieved by using agile-based process automation software...
(Pega, Appian and IBM BPM being popular examples). These software vendors strictly push an agile implementation pathway, with the focus on building the processes and screens. This approach eliminates the need to write business requirements. Entire processes and screen layouts can be built in a couple of days, demoed to the business and an iterative, agile cycle follows. If it sounds simple, that’s because it is.

Process isn’t just about challenging the way the business operates, it’s also about challenging the way organisations deliver change. It’s time to challenge the concept of business requirements.
When you’re in the garden, you pick up a spade to dig a hole. You use a rake to rake up the leaves. You’d never dream of digging a hole with a rake. The same is true for methodologies and frameworks in business, particularly in the areas of process improvement. But some organisations are still failing to understand that sticking to one particular methodology rigidly is akin to slavery.

It’s important to remember that no methodology can do everything; there is no silver bullet. Despite the fact that the particular methodology may be the flavour of the month, in a couple of years’ time, there will be a new framework coming along to replace it as the cool and popular method of the times.

**TALES FROM THE REVOLUTION...**

*3M Ambassador Geoff Nicholson recently remarked that “The Six Sigma process killed innovation at 3M”. The six sigma method stifled creativity as it was the wrong methodology for the task, instead being more suited to scaling production of manufacturing products.*

Many organisations choose to pick a particular tool like Six Sigma and stick to that tool rigidly. Blindly following a methodology with its structure, ticking off every box in the process of using that methodology, is simply going to take longer. It’s a self-indulgent process that turns organisations into bureaucratic beasts. Furthermore, being locked into a particular method is a very dangerous practice. This isn’t to say that having a methodology is all bad – it’s about being flexible with the methodology so that it is malleable when it comes to the opportunity for change.

However, many organisations (just as they do with their organisational structures and ways of doing things), lock themselves into a methodology, which means that they are blinded to opportunities of doing things better.
START YOUR REVOLUTION

Firstly, look out for the warning signs that your organisation is locked into methodology slavery. Typical signs involve staff commenting that they only use a particular methodology or that they won’t recruit particular staff unless they have experience with it.

Next, just as you would assess an employee for a role it’s important to assess whether you have the right methodology for the job. Build flexibility into your methodologies rather than forcing staff to follow it blindly, and be prepared to swap over to a different approach if progress is stagnating.

Finally, just as you’d adopt a continuous improvement process for operational processes, the same thinking should be applied to your methodology to ensure that it is constantly fit for purpose.

*It’s important to keep an open mind and choose the right tool for the right task. At the end of the day, it’s all about being practical with the method so that the organisation can create great outcomes for its customers.*

THIS SOUNDS LIKE MY ORGANISATION

☐ A Lot  ☐ A Little  ☐ Not At All
BUILD THE FUTURE
NOT DOCUMENT THE PAST
In the process world, it’s common for organisations to spend months and sometimes years trying to model or map out every process within an organisation. Staff spend incredible amounts of time drawing out the perfect. Sometimes organisations will spend years just trying to capture what it is that they do today. Often, by the time this exercise is completed, the market and the organisation has changed so much that the whole exercise has to be repeated from the start. This leads to a situation where the job can never be finished and frustration ensues. People then start to question the value of those doing the work. Modelling processes can be a fantastic way for organisations to analyse and improve if the goal is set clearly at the start.

Sometimes organisations map and model processes for compliance reasons, for regulatory reasons or just to give the CEO a view of what everyone is doing. But often organisations are unable to clearly articulate compelling business reasons for why they are mapping or modelling processes. It’s all about what is done with those beautiful swim lane diagrams. Is your organisation using those diagrams to question and improve the way things are done? Are you using them to build automation to increase efficiency and improve customer experience or are they just pretty pictures that you place on your walls?

**TALES FROM THE REVOLUTION...**

_A global insurance broker needed some assistance with a large transformation program. They had already spent the best part of a year with a team of people documenting their current state. They had nothing to take them to a future state. By bringing in the right expertise a series of workshops were conducted that captured both the current and the future state in only three weeks._

Unless there is a sound business reason behind them, modelling processes is simply vanity. If you find staff within your organisation continually mapping out processes, you need to stop them and ask them _Why_. What are the compelling reasons for doing it? Are they aiming to improve the organisation or are they just modelling processes on autopilot? Too many times IT departments buy software tools and spend their time dabbling and setting them up “correctly” as opposed to
using them to add value. Process mapping or modelling on its own is a redundant activity. Before any process mapping is undertaken, ask those doing the mapping what is it they are trying to achieve or improve in the business.

**START YOUR REVOLUTION**

When you know you are going to be improving a process, don’t waste time on the current state – do a workshop with stakeholders to define and agree the process, but there is no need to waste time documenting or modelling it. Taking a photo of the agreed process is sufficient to progress – that way the organisation can focus on transforming itself by building future state process.

That’s not to say that skipping directly to designing a future state is a good idea! Organisations that skipped to the future state often end up in a disastrous state where they don’t know what to change as it isn’t documented.

*What organisations need to focus on is capturing the minimum they need to know to move to the improvement phase as rapidly as they can. Delivering change which will bring business benefits is the aim, not the creation of documents that detail the past.*
KEEP IT SIMPLE...
A business process notation is a standardised approach to displaying a process graphically. In other words, it’s what the process map or model looks like – the page setup and shapes. The idea with modelling notations is that they achieve a level of consistency and standardisation which makes it easier for staff to digest. Except they don’t.

Most leaders in organisations or people in the business do not understand the complex notations used in the most common process notations. Business leaders and staff want things to be simple. So why would you use a notation with 200 different shapes that requires a training course to understand it? In effect you create a new language that no-one speaks. The solution is to keep it very simple. Use a very basic notation involving task shapes and decision points, start and end points; simple so that everyone in the organisation can understand it.

Many involved with process design also like to create beautiful process maps. Unfortunately, process mapping and modelling is not about being an artist and creating something beautiful. It’s about communicating what’s going on in the current state, and what’s going to happen in the future. Whilst some simple rules such as optimising colours and making shapes consistent can add to the comprehension of the process, spending excessive time on making processes visually attractive is an unnecessary indulgence.

TALES FROM THE REVOLUTION...

Savvy software companies such as Promapp have picked up on the fact that software tools with complex notations aren’t fostering uptake within organisations and are cashing in by selling business process software that makes it easy for end users to document their own processes. This gives incredible traction and allows those using the processes to feel a sense of ownership.
Start Your Revolution

Start by creating an extremely simple swim lane process template that is easy for the business to understand. This can be done using only 5 shapes (start, task, decision, link to other process, end).

A good trick is to limit your diagrams to only what you could draw on a wall. If you need to get out a handbook to remember what shape is which you’ve gone too complex and you will lose your audience.

There are many ways to document processes to understand what businesses are doing in their day-to-day work. There is also a great deal of wasted time creating complex notations that add little value to the business. The purpose of a process map or model is to communicate the current and/or future state in the easiest manner possible for whomever is looking at the process map. Comprehension is the primary aim – everything else is secondary. Focus on simplicity to enhance understanding.

This Sounds Like My Organisation

☐ A Lot ☐ A Little ☐ Not At All
STEAL THE WHEEL
Somewhere in the world another organisation has already fixed the problem you are trying to solve. But time and again organisations spend millions of dollars on improving processes when they have already been fixed elsewhere. Why?

Organisations are, of course, scared to work with competitors for good reasons. They’re hardly going to ask a competitor to share their solution. As a result everyone is trying to solve the same problem but doing it in what they believe is a better way.

Rather than continually re-inventing the wheel, organisations need to get smart and divert their energies towards *stealing the wheel*. That is, not looking inside the walls of your organisation for solutions, but first looking outside of those walls for partnerships with other companies who have already fixed the problem.

**TALES FROM THE REVOLUTION...**

*A large corporate was working to improve their customer onboarding processes. They had designed a process that eliminated 80% of manual work and created a great customer experience at the same time. It was going to be a big project and cost a lot of money. During the project they attended a conference where they saw a presentation by another firm in the same industry (but in another country) who had already completed an identical project. A few emails later they had built a collaborative team talking from different sides of the world, helping each other with their shared goals.*

**START YOUR REVOLUTION**

Start by looking for similar organisations in other countries that you can contact. Assess a range of them to identify arrangements where there can be mutual benefit through the sharing of expertise. There may also be opportunities with current partners or firms in other industries that do not compete with your products and services.
By maintaining the status quo the only people that are profiting from it are the consultants and the software companies selling the same solutions over and over again. Imagine how powerful it would be to be able to pick up the phone, call a partner on the other side of the world, and ask them to share that process and that technology with you so that you could implement it in your organisation; and how incredibly powerful it would be to be continuing in partnership, creating best of breed processes so that you can each outsmart your local competition. Beg, borrow and steal the wheel before even thinking about reinventing it.
DON'T LET LIMITATIONS KILL INNOVATIONS
Innovation is a huge buzzword in today’s business world. It’s seen as a means of making a great leap forward – a massive competitive advantage. But it’s also that being innovative is a herculean challenge akin to going from a biplane to a rocket ship and something that only highly creative people can do. The truth is that everyone is capable of innovation if approached in the right manner. Innovation is a process, not magic.

**TALES FROM THE REVOLUTION...**

A facilitator running an improvement workshop was having a tough time. One of the staff in the workshop was shooting down every suggestion that the other team members made. “Can’t do that!” she would exclaim at every suggestion over and over again. When questioned as to why the improvements couldn’t be implemented she could not respond with any sound reasons. It was simply a result of business rules that had remained unchallenged combined with the staff member’s institutionalised mindset.

Innovation involves the removal of the “can’t”. Can’t is one of the most dangerous words in business, but it is so ubiquitous because staff feel locked into old ways of doing things. There’s nothing that can’t be done in business. There is no can’t. So how do organisations get over the mindset that they can’t innovate?

**START YOUR REVOLUTION**

The first step is to challenge everything that staff do in their current business processes to help them to think outside of the way that they do things now. Challenge them on every piece of work they perform in a process by asking, “Why do you do this every single day?” Challenge everything in order to question whether that piece of work contributes to something of value for the customer.

The second step involves the removal of limitations. Placing limitations on staff thinking creates an artificial ceiling for innovation. Limitations kill innovations.
Aim for the stars. Aim for the best possible process that you can. You might not necessarily get there at the first attempt, but then you have a pathway. Ask staff how they would re-design their processes without placing any caveats on it and the results can be amazing.

The challenge is to stop thinking about innovation as a crazy science and start approaching it as a process, a series of steps to bring people to a new state of thinking where they can be creative and come up with new solutions to problems.
KILL
THE COMPLEXITY
COMPETITOR
In a recent survey* 74% of leaders stated that complexity has hurt efforts to meet process and decision making goals. Complexity is the first competitor.

Often leaders are so focused on what competitors are doing that they forget to look at what is going on within their own organisation. Of course, it’s important to understand the competitive environment that you operate in but many are in such a state of chaos that they don’t realise that they’re delivering poor customer experiences. Organisations need to get their houses in order before they start spruiking their products and services. In the world of the empowered customer, actions speak louder than marketing. There are enormous untapped cost savings and customer experience improvements waiting to be discovered, but these organisations are focusing their efforts in the wrong directions.

**TALES FROM THE REVOLUTION...**

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Two different insurance companies thought that they were running a project which would provide a significant competitive advantage. They both thought they were being innovative, but as it turned out, both of the companies were doing exactly the same thing at exactly the same time. Meanwhile both company's customers were deserting them in droves due to the poor customer experience generated by the highly complex and poorly managed processes within.
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Poorly functioning organisations are losing so many customers that their sales efforts are redundant. Customers are simply the meat in a highly ineffective sales sausage machine that is pushing them through and losing them on the other side. However, 62% of leaders surveyed* stated that reducing complexity with business simplification boosts productivity across all business lines. So how can they fight the complexity within?

*knowledge@wharton "simplifying the future of work survey"
Firstly it’s critical to understand where complexity occurs so that it can be untangled. Organisations have to understand the work that every staff member is doing in each process – every task that they are performing. Organisations must build a full understanding of where processes interact and question the outcomes of each process.

Look to start a process register that lists every process in the organisation, every role that’s involved with those processes and the outcomes of each process. Be careful not to split large processes into small ones as this hides the complexity! Don’t spend more than a week doing this.

Next, pick some target processes and question how every task in the process relates to the customer and how they benefit. Where there are no benefits look to eliminate or at least minimise that piece of work. Use this as a kick off exercise to show the benefits of embracing simplicity.

Don’t forget that as organisations grow, so do the amount of disparate systems. As you start to look at processes, don’t forget to engage IT leaders to understand their future plans for simplifying the organisation’s IT architecture.

Every day organisations across the globe are wasting billions of dollars on work that doesn’t need to happen. So remember: before you take the fight to your competitors, kill the complexity within.
The administration function is a dinosaur in today’s technologically advanced world. It is born of inefficient thinking and ill conceived “temporary” fixes for long-term solutions that never arise. Admin departments have a tendency to grow as manual workarounds increase as projects fail to deliver upon their promises.

**TALES FROM THE REVOLUTION...**

A telecommunications company sold a popular service to their customers (other businesses). They had 9 services that they sold as a package to each client.

They had a process map for each of the 9 services. They had procedures for each of the 9 services. When a new client came on board they created a customised version of the processes and procedures for that client. If a change was required they would have to change 9 sets of processes and procedures for each customer!

By not thinking things through, the organisation had created an enormous administrative overhead. They had created an admin monster that gobbled up time and resources, thereby increasing costs. Unfortunately this phenomenon is common in large organisations.

**START YOUR REVOLUTION**

Every customer thinks they are special and unique (and of course this is true to a certain extent) but the trick is to identify the parts of processes that are standard and reusable (think vanilla ice cream). This reduces the admin overhead, reduces the margin for error and allows businesses to go to market quickly if a potential new client comes along (take your vanilla ice cream and add topping (value)).

When organisations look to create or modify a process it’s important to remember to firstly standardise to make the core of the process reusable rather than re-inventing the wheel each time. Secondly, it is critical to make the process scalable so it is adaptable to growth.

*The trick to slaying the admin monster is to not create it in the first place.*
THIS SOUNDS LIKE MY ORGANISATION

[ ] A Lot  [ ] A Little  [ ] Not At All
Staff are frequently living in process bubbles. They see the work that is immediately in front of them, but they don’t see what happens to the work before or after their piece of the process. So if something goes wrong they don’t have the visibility of what has gone wrong and they have no idea how to fix it.

Standing back and looking at the process in its entirety is not some self-indulgent, navel-gazing exercise. By the nature of functional work, staff are motivated to get their work done, to meet the objectives of their roles and to do a good job. But doing work and doing it well doesn’t necessarily equate to good process. If the outcome of the overall process is not creating value for the customer, the effort involved is wasted.

**TALES FROM THE REVOLUTION...**

Staff are always amazed when they see an entire end-to end process in front of them. They are bowled over by the amount of work, numbers of staff involved and the amount of effort that the customer performs to get what they need. It is both confronting and powerful.

With the best of intentions staff often tweak their parts of the process in an attempt to make the process better. However, this is often done without looking at the broader context of the process and what the impact is to other parts of the process. Over time these processes become increasingly complex, costly and sway from their good intentions of providing value to the customer.

**START YOUR REVOLUTION**

Start by identifying process outcomes from a customer perspective – what the customer really needs the process to do for them. Always ensure that all of the staff involved with the process are present.

Next identify those aspects of the process that are good, bad and downright ugly before moving on to understand the current state process. Then work to improve
the entire process to ensure complete alignment with the customer’s goals. This is critical as analysing part of the process and trying to optimise it can end up doing more harm than good.

Understanding the process in conjunction with other staff eliminates the effect of staff living in their own process bubbles. This ensures greater visibility of their actions and a holistic approach to improving the process.
Process amnesia occurs when an organisation puts a process in place which over time becomes “the norm” or “just the way we do things”. The danger in this is that organisations forget why they created the process in the first place and just blindly follow it. It remains unchallenged and starts to cripple the organisation. It’s like having termites eat the wood that holds up your house.

**TALES FROM THE REVOLUTION...**

Having realised that a train ticket was faulty a customer went to the counter at the train station to have it checked. The staff member admitted it was faulty but refused to replace it until the customer returned with a receipt. The customer took their receipt and ticket to the counter and was passed a double sided A4 form which they had to complete and return. At the end of much filling in of forms and stapling they were handed a piece of paper that said “General Purpose Ticket”, rather than a new one. The customer was advised that they had to send all the paperwork to the audit department who would check the ticket, process the form and send the new ticket back to the station within 14 days.

So the customer had a wait of up to 14 days to receive a replacement ticket. In any other retail business a customer would take the product back and receive a replacement but this organisation had created a process full of so many checks and balances that they had lost sight of the fact that the process should have been focused on the customer outcome: an immediate replacement of the ticket (and an apology!)

**START YOUR REVOLUTION**

Start by identifying business rules within each process – these rules control the activities within the process and which paths work follow. These are often decision points, system coded rules or activities that “have to” be performed in a particular way.
Next identify which of these business rules are still relevant and accurate or which ones have been created through habitual behaviour. Finally work to challenge the habitual business rules for relevancy before doing the same for the other business rules. Just because they are still relevant doesn’t mean that there isn’t a better way of actioning the rules.

Processes that remain unchallenged become increasingly costly and more importantly an irritation for customers. Processes need to be challenged on a regular basis to ensure that they are optimised to produce outcomes of value.
CLOSE
PROCESS BLACK HOLES
Customers loathe them. Companies don’t realise they exist. They suck positive sentiment out of your customers and steal money from your company coffers. They are Process Black Holes.

Often the process becomes like a Pass-the-Parcel game where the passing never stops. It goes round and round passing work between multiple teams utilising company time and money until the customer gives up (and takes their business elsewhere). Even worse, the process becomes like a magician’s act – poof! It’s gone. Unresolved, uncontactable, unknown – except to your customers – who are working themselves up into a frenzy of discontent. “They’re useless!” you hear customers say – and they’re right.

**TALES FROM THE REVOLUTION...**

A call centre couldn’t understand why their sales team was so quiet! They had spent huge amounts on digital marketing and the phones were failing to ring. Despite their best efforts at building a telephone system that routed their customers to the correct department they had built a system that sent the customer in perpetual loops, never able to talk to the sales team. It wasn’t until a smart customer came through on another line to complain that the penny dropped that something was wrong.

Process Black Holes exist because companies don’t understand their processes, don’t have visibility and don’t manage them effectively. They are prevalent in organisations where there are processes that cross multiple functions and as a result have more opportunities for the process to fail.

So what can you do to rid your organisation of Process Black Holes?

**START YOUR REVOLUTION**

Firstly, understand where work is handed off between teams (visibility) then seek to remove hand-offs (redesign functional teams or automate where possible). Next, align all work with the customer need (eliminate unnecessary activities).
Finally, identify and measure common points of process failure before seeking to continually improve the process (track successes, cost savings and improvement for the customer).

*There are few things more frustrating for customers than to be passed around like a hot potato when all they seek is an answer to a problem. Even worse is when the customer is dropped out of the conversation and they feel they have been forgotten or ignored. This is when frustration turns to anger. Process Black Holes represent the epitome of poor customer service and they need to be closed before irreparable damage is done.*
EMBRACE FREEDOM
WITHIN BOUNDARIES
Many organisations today lack trust in their employees. Employees are often put in an organisational box with a job description and told never to get out of it again. This creates cultures of robots, of people who are afraid to say No and who are afraid to challenge the norm. It’s clear this doesn’t get the best out of people. Staff who are placed within micromanaged boundaries also lose the ability to problem solve which leads to an over-escalation of work to higher priced employees, thereby amplifying staff costs. Staff work best when given freedom to make decisions within boundaries.

Let’s say that you work in an organisation where everything needs to be approved. What is the cost of all those approvals?

**TALES FROM THE REVOLUTION**

*Analysis of a major bank’s processes highlighted a complete lack of trust that was embedded in the organisation’s culture ... one staff member needed a new ruler; a simple plastic ruler worth about 50 cents. To do this, he had to fill out a form as the organisation didn’t trust their staff not to steal the stationery. He then had to submit the form to a department for approval. Once processed, he received his ruler through the internal mail two weeks later. Possibly the most expensive ruler ever?*

The root cause of this poor process is the same – a lack of trust. If organisations can’t trust their employees with stationery they certainly won’t give them the freedom within boundaries required to look after their customers.

**START YOUR REVOLUTION**

Firstly, give your employees a “licence” to do the right thing. This needs to be a documented instruction from as high up in the organisation as you can muster. This licence should spell out that they can use their own initiative to keep the customer happy without repercussions. This must include the power to use company resources or to spend company money up to an agreed level.
Those that create great customer experiences trust employees to do the right thing by customers. If staff are stifled by rules and regulations their ability to think in the best interests of the customer becomes impaired. Organisations need to build cultures of autonomy and trust if they are to succeed in a customer-centric world.
The pursuit of organisational efficiency is common across corporates, not-for-profits and public sector organisations. All of them are looking at ways to trim the fat. Organisations often embark on significant programs of change only for things to go back to the way they were before. It’s a bit like an overweight person going on a diet to lose weight only for them to pile the pounds straight back on.

So why can’t fat organisations keep the weight off? It’s because they adopt short-term fixes with the aim of solving long-term problems.

**TALES FROM THE REVOLUTION...**

A financial services firm decided to embark on a program of business process improvement at the request of their Board. They brought consultants who identified huge cost savings along with massive benefits to the customers through automation of business processes. The executive team naturally wanted to implement some “quick wins”. However, when it came to the implementation of more substantial initiatives the firm quickly lost its appetite for change. They were more interested in a quick fix, fad diet than improving for the long term. There was not enough organisational pain to make them change old habits.

Just like losing weight, organisations have to adapt to a new way of life. The changes have to be permanent and continuous. Trying to change the entire organisation for the long-term doesn’t work unless it becomes part of the organisation’s DNA – part of the way work is done. Too often they go for the quick fix, trying to achieve rapid results without the pain.

**START YOUR REVOLUTION**

Firstly identify if the organisation really has a “burning platform” for change. This needs to be substantial or the initiative will fizzle out quickly. Next, look for commitment from the top down. If the response is weak, management support will be lacking and again it will not last the test of time.
Finally ensure that there are appropriate levels of resources committed for the long term. Throwing a couple of staff at an organisation-wide improvement program is a sure-fire sign of executive disinterest.

*If the aim is long-term success from your change initiative, the organisation must find ways to make things permanent and that means cultural change as well as changing the way that work is performed. This takes perspiration, inspiration and an ongoing approach that encourages staff to walk in step.*
SHATTER
THE PERMANENCY ILLUSION
Over the last 20 years there has been a huge shift in the manner in which work is performed. The move from large organisations filled with permanent staff to consultants, contractors and the birth of outsourcing is only the start of a seismic shift in the way organisations will work in the future. Today, millions around the world make their living through websites like Freelancer or UpWork. They bid for work online and are paid for what they deliver.

The future of work will not consist of permanent employees sitting at desks in offices. It will be fluid, dynamic and it will be results-based. Of course there will always be a need for a core set of permanent staff to man the ship, but there will be an ever more flexible structure to the crew.

Staff will be employed on the basis of achieving a specific goal or specific series of tasks. Permanent roles will start to decrease. Virtual teams will come to the fore. Organisations will recruit across the globe, not just in their locality. This will give organisations more flexibility to manage their resources the way they want to.

**TALES FROM THE REVOLUTION...**

*Entrepreneurs and small businesses are growing their businesses rapidly by hiring “virtual” resources from countries like the Philippines. They can employ highly flexible, highly qualified staff that will work harder and longer than local staff at a fraction of the price. Whilst larger organisations have attempted to do this in small doses, they are still not committing themselves to truly flexible resourcing that can provide a competitive advantage at a lower cost. Insurance firm QBE is one company that has achieved significant savings and increased flexibility by recently creating a global servicing centre in the Philippines.*

**START YOUR REVOLUTION**

Firstly understand all of the roles, job descriptions and tasks that your organisation performs – in totality. Make lists of those tasks that could be utilised from any location and which are not deemed sensitive to the organisation.
Next, split those tasks into those that are value-add and non-value add. Look to challenge the non-value add tasks to see if they can be eliminated. If they cannot be eliminated, look to use freelance staff at lower rates to perform those roles.

Once the organisation is comfortable with managing staff remotely they can expand to other higher skilled tasks. This is not to say that organisations need to hire staff from other countries to perform tasks – they can equally be hired on a self-employed basis within the country of operation.

*The comforting image of a safe, permanent job in a large organisation is an illusion. Today's workers have to be prepared to work in different ways, in different localities and ultimately be responsible for being paid based on the value they deliver; and organisations also need to be ready to work differently too.*
ENCOURAGE
REVOLUTIONARY
THINKING
Organisations continue to create cultures of yes-men – where people are too scared to speak up for fear of retribution or where they are afraid of making simple mistakes.

These cultures stifle creativity, innovation and progress. So if these kinds of environments where people are afraid to speak up are being fostered, how can they create cultures of improvement where organisations can be transformed?

Transformative change can be a long journey, but this change can be fast tracked by hiring people with a revolutionary nature. Revolutionary thinking forces staff to look at things differently. It forces them to challenge everything they do. It opens their eyes to new possibilities. Organisations need to take a leap of faith and engage resources who are not afraid to challenge the status quo.

**TALES FROM THE REVOLUTION...**

*A bank was running a project and the project sponsor thought he had all the answers. Every idea for improvement that the employees suggested was immediately dismissed. As a result the staff simply gave up and did as they were told. They became a colony of yes-men. The collective power and imagination of an entire team was reduced to one individual’s viewpoint. Staff felt disengaged, unvalued and unimportant and most left the organisation in frustration.*

Organisations don’t need more yes-men. They need to seek out those who will speak up and who will express their opinions without fear. Many organisations today are too comfortable. Encouraging a revolutionary mindset forces these organisations to come out of their comfort zone and be challenged. It’s the job of those revolutionaries to challenge every single piece of work that happens within organisations to question whether it adds value for the customer.
**START YOUR REVOLUTION**

Firstly, provide staff with a means to express their opinions without impunity. This needs to be implemented as an organisation-wide, cultural change – not just a department specific idea.

Next, use personality assessments (such as Insight profiles) to help to both understand your current workforce and also to recruit personality types that are innovative and creative. Ensure you have a mixture of personality types to get the best results. An organisation filled with creative personalities can be as dysfunctional as one without! As a rough guide trying to find 25% who fit a creative profile is a good balance.

Bring in external expertise to challenge the way things are currently done. You’ll be amazed at what a fresh set of eyes can reveal.

*As more nimble competitors snap at an organisation’s heels, time is running out. To stay ahead organisations need to create a healthy balance of revolutionary thinking that will disrupt the conservative approaches that are slowing them down and limiting their competitive advantage.*
MICRO-MANAGERS
A micro-manager is someone who is obsessed with detail and managing the staff below them to a level that paralyses the delivery of the work that is trying to be achieved. Micro-managers destroy staff morale, destroy team harmony and ultimately they destroy projects.

**TALES FROM THE REVOLUTION...**

A review of a project revealed that the project manager was drowning his staff in documentation. Executives were becoming frustrated at the lack of progress after seeing no tangible delivery. The project manager threw documents at them so as to smokescreen his lack of delivery. Staff left the company in frustration and complaints were made to HR about his bullying behaviour shortly before the project collapsed having cost the organisation millions of dollars.

So how do you spot a micro-manager so you can rid the organisation of them?

**START YOUR REVOLUTION**

Firstly, micro-managers love to create documents. It doesn’t matter if they are of adequate quality or not. They love to distribute documents for everyone to read. This creates the illusion that the micro-manager is actually doing work of value (when of course they are not). Documents create the illusion of work being done, but they’re just words on a page (not delivering value).

The second characteristic of micro-managers is their dictatorial approach to work. There is no collaboration with micro-managers. They love to tell people what to do and when to do it and they hate staff using their initiative or doing things their own way. If you don’t do it their way, they’ll make your life very uncomfortable.

Micro-managers also love to watch the clock. They want to see you working every hour of every day even if it’s unproductive. You may have completed all of your deliverables beyond expectation but if the micro-manager sees you not
working for one second, you’re in big trouble. Micro-managers hate freedom. They hate seeing people on the internet, out having lunch for more than “the allotted time” and they want to be in control of every situation. Fun at work is not allowed – heads down, bums up is the only way.

A further characteristic of micro-managers is that they love to create unnecessary work to create an aura of busyness around themselves. It makes them look like they’re doing work and doing things of value when, in fact, they are failing to deliver anything of value.

*Today’s organisations need to have a zero tolerance policy to micro-management. It’s an organisational disease with symptoms that can often be overlooked. They must look past the charming veneer of the micro-manager and eradicate the damage they are doing before it’s too late.*
TEAR UP
THE ORG
CHART
In most large organisations the org chart remains a relic of the industrial revolution. Siloed functions become barriers to customers getting what they want and managers fight territorial wars over who does what. The efficiency that the organisation has traditionally sought through these structures now needs to be seriously questioned. In today’s customer empowered age the importance of customer convenience and experience must outweigh the need for organisational efficiency.

This is not to say that being efficient and productive isn’t an important goal, but it can no longer be at the expense of the customer’s experience. The customer must always be first.

**TALES FROM THE REVOLUTION...**

The CEO of a technology provider called a meeting with all of his staff. He announced the very exciting news that they were restructuring and that this would “eliminate all the silos” in the organisation. Indeed they did restructure, but the only effect this had was to move the silos to other parts of the process. The problems were moved but not fixed.

**START YOUR REVOLUTION**

Start by obtaining all of the org charts and stick them on a wall to display all of the staff or departments.

Next, identify the top 10–20 core processes within your organisation. Using coloured pens or string, graphically demonstrate the flow of processes across the different teams on the org charts. Then document the organisational touchpoints for each process.
Finally conduct a review session with senior management with the focus on making the organisation more customer centric by aligning management resources with processes rather than by functions or teams.

*By tearing up the outdated concept of the functional org chart, organisations can take the first step towards true customer centricity.*
Write Your Own Job Description
When bringing in a new staff member into an organisation they have been chosen for a specific documented role. Often these job descriptions have been copied and pasted from another job description, tweaked and sent out to a recruitment agency that re-interprets them entirely. The candidate is then interviewed and asked questions determined either in a pre-set list of standard “best practice” questions or off the top of the head of the interviewer.

**TALES FROM THE REVOLUTION...**

The interview process can be a random one. Sometimes there are job descriptions, sometimes not. The roles that often get the best out of employees are those which do not have specific job descriptions but which allow freedom within defined boundaries. These jobs encourage initiative and flexibility rather than constricting the role. Sometimes employees are asked to write their own job descriptions. If that doesn’t guarantee that they’ll enjoy the role, nothing will!

When the chosen candidate joins the organisation they are given a printed piece of paper to sign with a job description on it saying exactly what they’re going to do. A boundary is placed around the tasks and responsibilities that they are there to do. A snapshot in time is created of what that person is there to do. But organisations change.

Many would choose to write their ideal job description if given the opportunity. Few people like to stay in the same role forever. People relish challenge and like to try new things. Of course, there are always those people who are quite happy doing the same thing for 10, 15 or 20 years, but that isn’t the case for the majority.

Organisations continue to limit people by constraining them to a pre-defined role in a box on an organisation chart. Is this getting the best out of staff, or are they being programmed to do specific tasks – unable to think outside of the box?
START YOUR REVOLUTION

Instead of detailed job descriptions that can’t be changed, provide staff with guidelines around their roles. Ditch generic “cut and paste” text in job descriptions and don’t exceed 1 page. Give staff the responsibility to collaboratively create roles that challenge and stimulate them. Instead of encouraging staff to move out of their roles, let them expand their roles instead.

People can be incredibly resourceful when given the opportunity, yet organisations today still pen employees into an organisational box that stunts their growth. Predictably employee engagement still remains a major problem for today’s organisations.

THIS SOUNDS LIKE MY ORGANISATION

☐ A Lot  ☐ A Little  ☐ Not At All
DON’T IMPRISON
EMPLOYEES
Is it a surprise that most offices today look more and more like prisons? Staff sit in small cubicles for 8 hours a day seemingly chained to their desks. Every now and again, they’re given the opportunity to shuffle into a meeting where they’re forced to talk about a subject that typically bores most of the people in the room. Is it a surprise that so many people want to escape from large organisations?

Effective working isn’t about sitting in the same desk all day. It’s about delivering value through products and services to customers.

**TALES FROM THE REVOLUTION...**

Some of the jobs most typically associated with a sedentary lifestyle are changing. Even bank Tellers are now mobile! A leading mutual bank in Australia has a mobile banking service that they take to regional areas where customers can transact with the bank just as they’d do in a branch.

It doesn’t matter how they deliver that value as long as they do it. The world is changing to task-based work and that means that it’s time to let employees work where they want, when they want, how they want. If your organisation doesn’t offer this kind of flexibility, another organisation will, and guess who they’ll want to work for?

**START YOUR REVOLUTION**

Firstly it’s important to understand that an honest dialogue between staff and management is always hard to facilitate. Instead, ask employees how they would want to work and form working groups to implement change. If your organisation isn’t prepared to do that, get prepared to lose staff.

Next change the focus away from hours worked to work based on tasks. This eliminates the clock watching mentality that blights modern organisations. Take task-based work to the next level by linking pay directly to deliverables.

Finally, examine the many technology options of making work mobile.
It’s ironic that organisations are prepared to provide such flexibility for consultancies and other organisations supplying services, but they won’t do it for their own employees – the people that they’re supposed to trust and nurture the most. It’s time to free staff from cubical prisons and set them free by implementing task-based work linked to the value that they deliver to their customers.
RECRUIT
A PROCESS ARMY
The typical approach to improving and managing processes within an organisation is to establish a specialist process team that look at processes across the entire enterprise. Whilst this is often a sound approach, there are some drawbacks.

Firstly, these departments are frequently under-resourced which means that there are significant demands upon their time and this leads to a skills bottleneck where they are allocated to projects based on business priority. As a result change can be slow to implement.

Secondly, these teams often adopt process modelling or mapping tools that require specific skills and training. This means that staff are unable to document their processes in these tools (often due to both lack of training and expensive licensing fees). Thus another bottleneck occurs, the business become frustrated and the once great idea of organisation-wide process improvement starts to look like an organisational white elephant.

**TALES FROM THE REVOLUTION...**

* A bank wanted to find a way to make process improvement part of the way they did things as an organisation; but they didn’t have the money or resources to form a large team. Instead of creating a small function that would add little value they arranged to train 40 staff in an easy-to-use process methodology. The staff were given an open invitation to go out and start using what they had learned. Within days brown paper and sticky note maps were appearing on walls and a process virus had been unleashed that brought almost instant improvements to life.

**START YOUR REVOLUTION**

The first step to creating a process army is to bring process to the people. The specialist process function has a key role to play in this by acting as a conduit for training that helps empower business users to take control of their own processes. Whilst not all staff will have the personality or skills to improve processes (even
with training), carefully selected “process champions” can act as catalysts to spread a process improvement “virus” throughout the organisation.

The next step is to provide software tools that allow any business user to take control and document their processes to form an enterprise-wide single source of truth. This helps to eliminate the bottleneck of the specialist process team who can then focus their time more productively by training and mentoring rather than documenting processes that the business know more intimately than they do.

*So when aiming for traction of process improvement and process management, don’t aim to recruit a team – look to build an army.*
For too long now many businesses have been treating their staff like disposable assets – meat for the grinder. If this is the way employees are treated, how do you think they will treat their customers? No matter where employees are within the organisation, they all have an impact on the customer experience – they are part of the chain that leads to the customer. Break that chain or pass the wrong message down the line and you do damage. Conversely, happy employees make happy customers.

**TALES FROM THE REVOLUTION...**

A retail company had noticed a problem with their office staff productivity. Upon further investigation it was evident that staff were not being provided with resources that they considered basic necessities or “hygiene factors” – such as adequate sized computer screens or chairs that didn’t cause chronic back pain! As a result they were becoming increasingly unhappy and productivity was slumping. Virgin boss Richard Branson said it best when he commented that “There’s no magic formula for great company culture. The key is just to treat your staff how you would like to be treated.”

So when seeking to create customer-centric organisations, it’s important to understand that it’s not just about the customer touch-points. It’s about a customer ethos, fuelled by happy employees that flows through every part of the organisation – even those roles that do not interact directly with customers. So if those staff members are feeling that they are not being adequately supported with the tools to do their jobs their unhappiness will eventually impact the customer. Organisations that have happy employees have more productive employees too. A study by the University of Warwick found that happy employees were 12% more productive, with unhappy workers 10% less productive.

**START YOUR REVOLUTION**

Firstly engage your employees to define what they deem to be basics that every employee should have and work to meet those requirements. Employees notice
everything and if the executives have the expensive tea bags they will soon know about it! Let the employees come up with these themselves without management pouring cold water on their ideas. You may be surprised how reasonable they might be.

Next, work to define what may be deemed as non-basic requirements that can boost employee happiness. For example, social activities or employee benefits programmes (where staff receive deals or special offers with other partnering companies). It’s important to understand that without all of the basics in place other non-basic activities are likely to be wasted effort. Progress is the key – if you fail to implement what staff need to be happy you run the risk of disappointing staff, leading to further decreases in levels of happiness.

*Business process is an authentic voice that says what business you are in. In other words, the actions that you perform speak louder than any marketing. To create true customer-centric organisations staff need to be treated with the same respect that is often reserved only for customers. It’s time to spread a little happiness throughout organisations that will boost both employees and customers.*
INVERT THE PYRAMID
Every organisation chart today looks the same – and the most important people in your organisation are at the bottom of the pyramid. They are the staff in customer-facing roles who create the experiences with customers.

These are the people that the rest of the organisation needs to support in order to create great customer experiences. Staff are so busy focusing on their day-to-day work that they forget about the customer and forget that their jobs are often to give their internal customers the support to create great experiences for the true customer.

How many contact centres would let their employees speak to customers for an hour on one call? Not many. Tight call resolution times mean that most organisations try to resolve the customer enquiry as quickly as possible. Typically little thought is given to enhancing the customer experience and building a relationship.

**TALES FROM THE REVOLUTION...**

Online shoe retailer Zappos takes a different approach. They don’t try to force customers off calls – they do what it takes to build customer relationships and if that means staying on a call for 9 hours and 37 minutes like one of their staff did, that’s what they’ll do. “We don’t judge, we just want to help,” said the staff member who took the call.

The focus should always been on meeting the customer need and trying to fulfil that need at the first attempt, irrespective of the time it takes.

**START YOUR REVOLUTION**

Firstly, organisations today need to stop thinking of customer-serving staff as the bottom of the line and to start treating these staff as the most important people in the organisation.
Next, they have to change the emphasis from a transactional based numbers game to creating experiences that build relationships with customers. Give those serving customers every opportunity to do it in the best manner possible: the best facilities, tools and resources available.

*Everyone across the bottom of the pyramid is acting to support customers, so invert the pyramid so that those people are viewed as the priority. The rest of the organisation supports those teams! It’s time to turn the pyramid on its head.*
BALANCE THE AUTOMATION SEE-SAW
Technology today is wonderful and there is a bewildering array of software vendors that claim to solve every business problem imaginable. But software is not the silver bullet for every business problem.

The common mistake that these organisations make is that they don’t examine their business processes first to understand what is wrong with them. Consequently, what happens is those organisations end up taking an existing process and automating it. What this results in is a poor process that simply happens faster. Think “garbage in, garbage out” except faster!

**TALES FROM THE REVOLUTION...**

*A customer-owned organisation had a number of complex rules for accepting members that was difficult even for staff to understand. However, when built into a software system the process became incredibly simple for both staff and customers. Staff simply had to walk the customer through a number of questions to process the membership. This vastly reduced the time required to complete the application and allowed the customer service rep to spend more time introducing the organisation’s other products and services.*

The reality is that there is rarely full automation of business processes (and nor should there be as human interaction is an important part of building positive customer experiences). Business processes have to have the right balance between technology and human interaction. There are still a multitude of tasks that are better suited to humans than to software.

Just like the machines of the industrial revolution, organisations still need staff to operate them effectively. Hand in hand with this, organisations need flexible software tools that they can use to automate parts of the process where humans can’t add value.
Firstly, only look to fully automate a process if it will provide a more positive customer experience to do so. Next, understand that at points in the process customers may wish to switch from an automated process to another means of communicating with the organisations – so always look to make it easier for the customer to switch over. Prominently placed online chat or “Call Me” buttons can be a good way of doing this.

Finally, where time is being reduced through automation, rather than seeing it simply as a cost saving, look to channel the time savings in a way that will improve the customer experience or propagate cross sales. Those manual steps should aim to boost revenues and customer loyalty.

The balance between technology automation and human interaction is like a seesaw; but one that can be balanced with the right level of understanding of business process.
TIDY UP YOUR TOYS
Software tools can be of great assistance when analysing and modelling business processes but their usage can be fraught with a dangerous undercurrent of inactivity. Organisations can spend more time configuring software than they do with delivering results for customers. I’ve seen teams of people spend months trying to get a software tool working in an ideal manner when really what they should be doing is using it to deliver value to the business and to customers.

**TALES FROM THE REVOLUTION...**

*A large broking organisation bought a process modelling tool for several hundred thousand dollars. They spent endless hours in meetings and working groups trying to agree what their processes should look like, what shapes they should use to represent tasks and myriad other small technicalities. They lost focus on what they were using the tool to achieve for the business and its customers. By the time they agreed how to use the software (several months later) the project had shut down for not meeting any of its deliverables.*

**START YOUR REVOLUTION**

Technology toy dabbling is a dangerous practice, and unfortunately a common one. Software tools for managing business processes should be used with caution.

Firstly, consider whether you need a software tool at all to improve your business processes. Sticky notes and brown paper can solve a huge amount of the process problems in the world. Software tools can often create a level of complexity where people drown in detail. The challenge with business processes is to keep them simple, easy to understand and easy for business users to digest.

If your organisation does want to invest in a tool, first start with understanding the true business problems you wish to solve:

Do you wish to understand processes to improve them? Buy a mapping or modelling tool such as Visio or ARIS.
Do you wish to document processes for quality and training purposes? Buy a process documentation or electronic content management tool such as Promapp.

Do you wish to automate business processes? Think Business Process Management Systems such as Pega or Appian.

Staff can often get swallowed up in the functionality of the tool and lose sight of why they’re doing what they need to do. So next time you start out on your process improvement project, focus on meeting outcomes not playing with your new technology toys.
PRESS THE
Delete
BUTTON
The ability to implement technology that adds value to organisations and customers is one of the most important capabilities in business today. So why is it in an era where technology is changing the world like never before that IT departments are so heavily criticised for failing to meet business needs?

Physically, IT is often separated from the business as far as they can be (sometimes outsourced to another country!), thereby creating a tyranny of distance that destroys personal interactions. Mentally the business leave them out of projects and discussions until they get to that final, mystical IT solution stage leading to frustration and disappointment on both sides. IT departments are also guilty. Historically they have been so focused on keeping systems running without interruption that they’ve forgotten how to innovate to meet the growing needs of organisations. Both the business and IT have created a divide that is killing many organisations.

With the growing emphasis on cloud computing IT’s traditional role as custodians of “keeping the lights on” of systems is rapidly becoming redundant. This leaves the future of IT as a proactive enabler for business strategy. The reactive IT approach of building solutions to fix business problems isn’t going to create the competitive advantage that is now a business essential.

**TALES FROM THE REVOLUTION...**

* A senior IT manager in a major insurance company confessed that he never talked to the business people. “We never see them, never talk to them, don’t really understand what they want – they see us as adding little value so year by year they outsource a bit more of the IT department”.

Out of the millions of brilliant, innovative technology ideas that are popping up all over the world, very few are the result of IT innovation in large organisations. So what should be tomorrow’s approach to IT?
Firstly understand that the concept of the IT department is no longer relevant in today's organisations. Technology has become so intrinsically linked to day-to-day work that IT capability must be “on tap” for the business. The simplification of systems and “no code” technology means that business users can adopt a huge range of technology without IT involvement.

Next, move “lights on” services to cloud providers and outsource all non-value add IT services. Set and forget. Focus your remaining IT staff on innovative, creative and efficient systems that provide competitive advantage. This will involve changing your structure to incorporate those with the right skills and mindset into your business functions. Consign the concept of the IT department to the past.

Finally, foster trusted relationships with software vendors who want to partner and grow with you. Favour hungry upstarts over fat and safe operators.

*It's time to press the delete button on the IT Department – today everyone has to be an “IT person”.*
Large organisations have complex environments that have a number of negative effects on productivity. As a result, decision-making processes become highly involved; committees, staff that check each other’s work and staff re-checking work that those staff checked (just in case). That’s what was termed quality in “the old days”, and as organisations become larger and more complex, there are more people duplicating the checks.

A big business mentality is created within organisations where these things become the norm. It’s not unusual for decisions to take weeks or even months, particularly project business cases which can often take longer to create than the projects take to run!

**TALES FROM THE REVOLUTION...**

A business case for a large transformation project was being compiled. The organisation had already been doing analysis for 2 years prior to bringing in assistance to finish it. A further 6 months was spent finalising the business case before it received funding. Every executive in the organisation (approximately 20) was required to sign off on it before it went to the global heads for sign off. Prior to doing so they employed a consultancy to review it at great cost even though no changes were made. Eventually the business case was signed off two and a half years after project inception. Meanwhile their major competitor had completed a similar project before they’d even started.

Many organisations today have “couch potato syndrome”. They’re a little bit fat, a little bit lazy and dangerously they see no need to change their ways. Whilst they may not be setting the world on fire with growth and profitability they are still doing well enough not to experience significant pain. There is no “burning platform” to make them dive into a deep ocean of change. They continue to act in the same manner – work taking too long, taking products to market too slowly and ultimately feeling comfortable with the world. But when organisations act big, they also can fail big. By continuing to embrace the same structures and processes that they’ve had in the time of success, when crisis strikes and the competition rears its head, these companies struggle to adapt quickly enough and competitors swallow up their customer base.
Imagine the scenario of a large corporate being attacked by several small, nimble organisations. They simply cannot compete. Their processes can’t adapt to compete with the smaller organisations’ faster and more agile ways of working.

So how can big organisations survive?

**START YOUR REVOLUTION**

Firstly, start thinking small by simplifying organisational structures to enable autonomous decision-making.

Next, look closely at the organisation’s approval processes for decisions and purchasing. Provide greater decision- and purchase-making power down the chain.

Finally define who is accountable for decision-making and purchasing and communicate it throughout the organisation. Cultivate a culture of decision-making that favours decisions over inaction, even if the risk of failure is higher.

*Over the next two decades large organisations will face a threat from smaller upstart competitors like never before. Changing their decision-making processes to be faster and more agile is key to them surviving for the long-term.*
CHANGE
GET OVER IT
Speed is one of the most critical factors in business today. The time it takes you to bring to market new products and services is a vital edge over your competitors. But how can you do this when your projects take years, are substantially over budget and you’re still delivering a poor product for your customers and for business users?

Organisations have to be built to be able to change and change rapidly. But what if they can’t? Most struggle and the word “change” continues to terrify leaders.

Executives continue to throw hundreds of thousands of dollars at piecemeal training programs to educate their staff about change. Indeed not just educating their staff, but trying to stop their staff being afraid of change. Change is simply a part of evolving businesses. It’s going to happen and it’s going to happen every day from now on. Just as technology is making the world move at a faster pace, change is now inevitably accelerating.

**TALES FROM THE REVOLUTION...**

*A major bank decided to transform their business processes. Being new to doing this they decided that a 1-day “managing change” workshop would solve all their problems. They trained hundreds of staff and spent over $150k on training, then never mentioned change again. Several months later when they started implementing change and staff started to panic, no-one seemed to remember the training, or where to find their manuals...*

**START YOUR REVOLUTION**

Firstly, if your staff aren’t prepared to juggle change on a daily and weekly basis it’s time for them to move to a new career. The snug, safe organisations of our parents’ age are gone forever.

Next, organisations need to look to work with resources that are fit for the modern age. Those that are flexible can adapt to change and can work anywhere, any time.
Finally, it’s time to throw out the change management textbooks and cancel the training courses. Every organisation in the world today needs to have a firm grip on the fact that change is a fundamental part of today’s world and it is a business imperative to be able not just to change, but to change rapidly. Change isn’t a 6-month project or a traumatic transformation that arrives like a tsunami and forces a rebuilding. It’s part of business life on a regular basis.

The expectation of change needs to be set up-front as a given. Those that are not afraid of this are welcome to join the party. Change, get over it.
DON’T RIDE THE ONE-TRICK STRATEGIC PONY
Executives love to talk about strategy. Strategy guides the organisation to achieve its goals, or at least it should. However, even though the world has changed, the approach to strategy hasn’t. Organisations are still producing long-winded documents that talk about what they’re going to do over one, three, five and ten years’ time. Strategy today moves at such an incredible pace it’s frightening. Plans longer than 12 months are largely irrelevant in today’s age.

The competitive environment is changing and moving so rapidly that to create plans focused on years in the future is guesswork (and why so many are so vague). Instead of trying to predict the future, which is so uncertain in today’s age, organisations need to focus on building capability to be able to change proactively and rapidly.

**TALES FROM THE REVOLUTION...**

A major bank had created a 5-year strategic plan which they would report on to the board every quarter, and every quarter there was a scramble to add achievements to justify the goals. Year by year the strategic goals seemed less and less relevant and market conditions changed their focus. Despite this they were locked into following the strategic plan even though operationally they were moving in a different direction – too afraid to admit to the board that the plans were no longer relevant or being followed.

**START YOUR REVOLUTION**

Because of the pace of change, strategy needs to be fluid. Strategy can’t be fixed; it needs be based on different possible pathways, with the capability to switch between them depending on the competitive environment and market conditions.

Firstly take your current strategic plans and create three scenarios for each key strategic element in the plan. Pick the options with the highest reward as your chosen pathway (even if they are of highest risk). Your other two scenarios represent your back-up options should the chosen pathway fail to materialise.
Next, eradicate the thinking that the strategic plan is set in stone. The plan should be reviewed at least on a quarterly basis to identify whether the strategy is relevant or if it needs to switch to an existing alternative pathway or a completely new one.

Strategy will always have an important place in business, but the days of one strategic plan that gazes years forward into a utopian future are drawing to a close. It’s a one-trick pony that’s becoming out-of-date very quickly.
QUESTION YOUR COMMITTEES
Decision by committee is a costly and time-consuming way to get work done. They are often a symptom of an organisation that does not devolve enough decision-making power to individuals. The organisation is afraid to give them the power to make a decision, instead spreading the responsibility across a committee. They are also the symptom of an organisation that is unsure of responsibilities. As a result committees are created “just in case” someone who should be involved with the decision is left out.

**TALES FROM THE REVOLUTION...**

15 senior managers in a financial services firm were asked to approve a concept document that had been distributed for their review. None of them would approve it as every person had a differing perspective on what the concept should be. Each person was responsible for a different business area and as a result each wanted the concept to favour their area more than the others. So what eventuated was a deadlock of opinions where the document was taken away, revised, updated and brought back to the same committee for review again and again. The review process didn’t end until an even more senior manager was brought in to settle the debate.

Now just think about that: 15 highly-paid executives sitting in a room for hours discussing a document that merely describes a high-level concept for a proposed project. Thousands of dollars were spent every hour those 15 people sat in a room, and none of them was willing or able to make a group decision.

**START YOUR REVOLUTION**

Start by creating a list of all of the committees in your organisation. Include both committees that operate within departments and especially those that comprise staff from many departments. Identify which committees need to exist and those where accountability for decision-making can be deferred to an individual or team.
Next, trust your managers. Let them make the decisions and let them run their own sections of the organisation as they were intended to do when they were first appointed.

Identify the staff attending each committee and identify the staff that really need to attend. Clearly understand and define the responsibilities of each team so they can be empowered to make decisions without the need to create committees.

If you are struggling to get traction on cutting committees, calculate the total cost of each committee and present it to senior management (hourly employee cost x number of attendees x number of meetings per year). For example, one committee of 15 senior executives meeting for 2 hours every fortnight would cost in the region of $75,000 per year!

When structures of approvals and committees are created, organisations reduce the pace of getting things done. What can take smaller, more nimble organisations months to complete can take large organisations years. They can’t afford to exist that way anymore, or they simply won’t exist at all.

This sounds like my organisation

A Lot  A Little  Not At All
MAKE TIME FOR NOTHING
In a world focused on efficiency and productivity, making time for nothing might sound counter-productive. Organisations are rightly focused on improving these factors, but taking time out is actually key to increasing efficiency and productivity.

If employees are pushed to the limit doing their day-to-day work there is simply no time to foster free thinking and to declutter the mind. Highly innovative companies, such as Google provide their employees with designated time out as they understand the powerful effect this time can have on them.

**TALES FROM THE REVOLUTION...**

J.P. Morgan, who took 2 months off every year, once said, “I can get done in 10 months what I could never do in 12.” Taking breaks enables a kind of “switch” in the brain that authors Herbert Benson and William Proctor called “The Break-Out Principle”. They found that taking time out to do nothing increases mental function, creativity and productivity.

**START YOUR REVOLUTION**

Firstly start by setting designated time for each of your employees to have time out to “clear the cache” in their brains. This could be as simple as calendar reminders or offering scheduled meditation breaks in a quiet space in the office.

Next, block access to systems after designated work hours to discourage workaholic behaviour that saps productivity.

Finally, enforce breaks and holidays at regular scheduled intervals throughout the year where possible.

*Productivity and efficiency are key to today’s organisations, but to increase them organisations have to understand that doing nothing can be a catalyst for greater effectiveness of both.*
THIS SOUNDS LIKE MY ORGANISATION

☐ A Lot  ☐ A Little  ☐ Not At All
Congratulations! You’ve taken the first step on a journey of customer experience and business process enlightenment that can transform your organisation for the better.

Business process improvement is not a race with a finish line but a continuous improvement process that is cyclical. But start you must.

Use the assessments at the end of each chapter to identify which are the highest priority problems for your organisation. You can use the following table as a plan-on-a-page to start targeting the areas that are in need of immediate attention then continue onto the lower priority items as you make progress.

Your Process Revolution has begun ...
<table>
<thead>
<tr>
<th>Measure for Profit</th>
<th>□ A Lot</th>
<th>□ A Little</th>
<th>□ Not At All</th>
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</thead>
<tbody>
<tr>
<td>Stop Checking the Checkers</td>
<td>□ A Lot</td>
<td>□ A Little</td>
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<tr>
<td>Eliminate Exceptions</td>
<td>□ A Lot</td>
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<td>Cut Paper</td>
<td>□ A Lot</td>
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<tr>
<td>Halt the Conveyor-belt</td>
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<tr>
<td>Understand Customer Experience IS the Process</td>
<td>□ A Lot</td>
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<tr>
<td>Make the Customer Everyone’s Customer</td>
<td>□ A Lot</td>
<td>□ A Little</td>
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<tr>
<td>Outsource all or none</td>
<td>□ A Lot</td>
<td>□ A Little</td>
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<tr>
<td>Escape the Organisational Island</td>
<td>□ A Lot</td>
<td>□ A Little</td>
<td>□ Not At All</td>
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<tr>
<td>Wear Different Customer Hats</td>
<td>□ A Lot</td>
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<td>Switch Off the Robots</td>
<td>□ A Lot</td>
<td>□ A Little</td>
<td>□ Not At All</td>
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<tr>
<td>Get Back to Front</td>
<td>□ A Lot</td>
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<td>□ Not At All</td>
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<tr>
<td>Find the Straw that Breaks the Customer’s Back</td>
<td>□ A Lot</td>
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<tr>
<td>Don’t Over-Service Your Customers</td>
<td>□ A Lot</td>
<td>□ A Little</td>
<td>□ Not At All</td>
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</table>
## THIS SOUNDS LIKE MY ORGANISATION

<table>
<thead>
<tr>
<th>Activity</th>
<th>A Lot</th>
<th>A Little</th>
<th>Not At All</th>
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<tbody>
<tr>
<td>Stop Giving Your Customers Away</td>
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<tr>
<td>Obliterate Over-Standardisation</td>
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<td>Do What You Don’t Do Now</td>
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<td>Focus on Why, Not What</td>
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<td>Start With the End in Mind</td>
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<td>Loosen The Project Management Noose</td>
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<td>Be Prolific, Not Perfect</td>
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<td>Be Agile, Not Fragile</td>
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<td>Say Goodbye to Business Requirements</td>
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<tr>
<td>Escape from Methodology Slavery</td>
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<td>Build the Future, Not Document the Past</td>
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<td>Keep it Simple</td>
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<td>Steal the Wheel</td>
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<td>Don’t Let Limitations Kill Innovations</td>
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<td>Kill the Complexity Competitor</td>
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<td>Slay the Admin Monster</td>
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<td>Burst Process Bubbles</td>
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<td>Challenge the Unchallenged</td>
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<td>Close Process Black Holes</td>
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<td><strong>Embrace Freedom</strong></td>
<td>□ A Lot</td>
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<td><strong>Within Boundaries</strong></td>
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<td><strong>Add Diet to Your DNA</strong></td>
<td>□ A Lot</td>
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<td><strong>Shatter the Permanency Illusion</strong></td>
<td>□ A Lot</td>
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<td><strong>Encourage Revolutionary Thinking</strong></td>
<td>□ A Lot</td>
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<td><strong>Fire Micro-managers</strong></td>
<td>□ A Lot</td>
<td>□ A Little</td>
<td>□ Not At All</td>
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<td><strong>Tear Up the Org Chart</strong></td>
<td>□ A Lot</td>
<td>□ A Little</td>
<td>□ Not At All</td>
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<tr>
<td><strong>Write Your Own Job Description</strong></td>
<td>□ A Lot</td>
<td>□ A Little</td>
<td>□ Not At All</td>
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<tr>
<td><strong>Don’t Imprison Employees</strong></td>
<td>□ A Lot</td>
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<td>□ Not At All</td>
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<tr>
<td><strong>Recruit a Process Army</strong></td>
<td>□ A Lot</td>
<td>□ A Little</td>
<td>□ Not At All</td>
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<tr>
<td><strong>Spread a Little Happiness</strong></td>
<td>□ A Lot</td>
<td>□ A Little</td>
<td>□ Not At All</td>
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<tr>
<td><strong>Invert the Pyramid</strong></td>
<td>□ A Lot</td>
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<td>□ Not At All</td>
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<tr>
<td><strong>Balance the Automation See-Saw</strong></td>
<td>□ A Lot</td>
<td>□ A Little</td>
<td>□ Not At All</td>
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<tr>
<td><strong>Tidy Up Your Toys</strong></td>
<td>□ A Lot</td>
<td>□ A Little</td>
<td>□ Not At All</td>
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<tr>
<td><strong>Press the Delete Button</strong></td>
<td>□ A Lot</td>
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<td>□ Not At All</td>
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<tr>
<td><strong>Think Big, Act Small</strong></td>
<td>□ A Lot</td>
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<td>□ Not At All</td>
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<td><strong>Change. Get Over it.</strong></td>
<td>□ A Lot</td>
<td>□ A Little</td>
<td>□ Not At All</td>
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<tr>
<td><strong>Don’t Ride the One-Trick Strategic Pony</strong></td>
<td>□ A Lot</td>
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<td><strong>Question Your Committees</strong></td>
<td>□ A Lot</td>
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<td>□ Not At All</td>
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<tr>
<td><strong>Make Time for Nothing</strong></td>
<td>□ A Lot</td>
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<td>□ Not At All</td>
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</tbody>
</table>
Craig Reid is an International Keynote Speaker and consultant specialising in Business Process and Customer Experience Improvement. He came to be recognised globally as a Business Process thought leader through his blog, The Process Ninja and was named several times as one of the top process bloggers in the world.

He works with some of the world’s leading organisations via his Sydney–based consultancy, The Process Improvement Group, and is available for keynote speaking and consulting engagements globally.

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[https://www.linkedin.com/in/craigreid](https://www.linkedin.com/in/craigreid)
Large organisations are under competitive threats like never before. The game has changed and the rules re-written.

DO YOU KNOW WHAT THEY ARE AND HOW YOU CAN WIN?

In The Process Revolution, global process improvement expert Craig Reid identifies the 8 critical challenges that need to be addressed by today’s organisations before it’s too late.

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