Contents

CHAPTER 1
The Roadmap: Learning How to Navigate 1
Can You Do It? 5
The Journey 6
The Ten Simple Steps to Business Process Improvement 9
   Step 1: Develop the Process Inventory 9
   Step 2: Establish the Foundation 9
   Step 3: Draw the Process Map 10
   Step 4: Estimate Time and Cost 11
   Step 5: Verify the Process Map 11
   Step 6: Apply Improvement Techniques 12
   Step 7: Create Internal Controls, Tools, and Metrics 13
   Step 8: Test and Rework 14
   Step 9: Implement the Change 14
   Step 10: Drive Continuous Improvement 15
The Executive Summary 16
Business Process Management 16
Case Study 1: Training and Development 16
Case Study 2: Recruitment Process in Hong Kong 16
Chapter Summary 17

CHAPTER 2
Step 1: Develop the Process Inventory: Identifying and Prioritizing the Process List 18
The Process Inventory 19
Process Prioritization 23
   Developing Criteria 23
   Determining Scale 29
   Applying Weighting 43
Chapter Summary: Step 1 48
<table>
<thead>
<tr>
<th>Time Estimate</th>
<th>48</th>
</tr>
</thead>
<tbody>
<tr>
<td>Build the Business Process Inventory</td>
<td>48</td>
</tr>
<tr>
<td>Sponsor Meeting</td>
<td>49</td>
</tr>
<tr>
<td>Establish Categories, Criteria, Scale, Weighting</td>
<td>49</td>
</tr>
<tr>
<td>Complete the Process Prioritization Table</td>
<td>50</td>
</tr>
<tr>
<td>A Second Sponsor Meeting</td>
<td>50</td>
</tr>
<tr>
<td>What You Have Achieved</td>
<td>50</td>
</tr>
<tr>
<td>Knowledge Check</td>
<td>50</td>
</tr>
</tbody>
</table>

### CHAPTER 3

**Step 2: Establish the Foundation: Avoiding Scope Creep**

<table>
<thead>
<tr>
<th>The Eight Sections of the Scope Definition Document</th>
<th>52</th>
</tr>
</thead>
<tbody>
<tr>
<td>Section 1: Process Name</td>
<td>55</td>
</tr>
<tr>
<td>Section 2: Process Owner</td>
<td>57</td>
</tr>
<tr>
<td>Section 3: Description</td>
<td>58</td>
</tr>
<tr>
<td>Section 4: Scope</td>
<td>63</td>
</tr>
<tr>
<td>Section 5: Process Responsibilities</td>
<td>67</td>
</tr>
<tr>
<td>Section 6: Client and Client Needs</td>
<td>69</td>
</tr>
<tr>
<td>Section 7: Key Stakeholders and Interests</td>
<td>70</td>
</tr>
<tr>
<td>Section 8: Measurements of Success</td>
<td>72</td>
</tr>
</tbody>
</table>

**Chapter Summary: Step 2**

<table>
<thead>
<tr>
<th>Time Estimate</th>
<th>72</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Project Team Meeting</td>
<td>76</td>
</tr>
<tr>
<td>Sponsor Meeting</td>
<td>77</td>
</tr>
<tr>
<td>What You Have Achieved</td>
<td>77</td>
</tr>
<tr>
<td>Knowledge Check</td>
<td>77</td>
</tr>
</tbody>
</table>

### CHAPTER 4

**Step 3: Draw the Process Map: Flowcharting and Documenting**

<table>
<thead>
<tr>
<th>Process Map Overview</th>
<th>79</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drawing the Process Map</td>
<td>80</td>
</tr>
<tr>
<td>Box 1</td>
<td>85</td>
</tr>
<tr>
<td>Box 2</td>
<td>89</td>
</tr>
<tr>
<td>Box 3</td>
<td>92</td>
</tr>
<tr>
<td>Boxes 4–8</td>
<td>95</td>
</tr>
<tr>
<td>The Cross-Functional Process Map</td>
<td>95</td>
</tr>
<tr>
<td>Continuing the Work from Meeting to Meeting</td>
<td>98</td>
</tr>
</tbody>
</table>

**Documenting the Process**

| 103 |
| Process Mapping Tools |
| Microsoft Visio | 106 |
| SmartDraw | 107 |
Chapter Summary: Step 3
Time Estimate
  Second Project Team Meeting
  Postmeeting Work
  Follow-on Project Team Meetings
What You Have Achieved
Knowledge Check

CHAPTER 5
Steps 4–5: Estimate Time and Cost and Verify the Process Map:
Introducing Process and Cycle Time and Gaining Buy-In

  Business Process Timing
  Process Time
  Cycle Time
  Process Cost
  People Costs
  Tool Costs
  Overhead Costs
Putting It All Together
Alternative Cuts of the Data
  Analyzing the Cost Estimate Columns
Verify the Process Map
  Process Workers
  Stakeholders
  Sponsor
Chapter Summary: Steps 4–5
Time Estimate
  Project Team Meeting
  Postmeeting Work
  Sponsor Meeting
  Verify the Process Map
  Postvalidation Work
What You Have Achieved
Knowledge Check

CHAPTER 6
Step 6: Apply Improvement Techniques: Challenging Everything

  Eliminate Bureaucracy
  Value Added
  Eliminate Duplication
CHAPTER 9
Step 9: Implement the Change: Preparing the Organization

The Implementation Plan
Overview of the Three Phases of the Implementation Plan
  The Design Phase
  The Development Phase
  The Implementation Phase
The Four Tracks in the Implementation Phase
  Change Management Track
  Testing Track
  Communications Track (Communication Plan)
  Training Track (Training Plan)
Chapter Summary: Step 9
Time Estimate
  Develop the Implementation Plan
  Refine the Impact Analysis
  Develop the Communication Plan
  Develop the Training Plan
  Gain Sponsor Buy-In
What You Have Achieved
Knowledge Check

CHAPTER 10:
Step 10: Drive Continuous Improvement: Embracing the New Mindset

The Continuous Improvement Cycle
  Evaluate
  Test
  Assess
  Execute
Continuous Improvement Plan
Chapter Summary: Step 10
Time Estimate
  Develop the Continuous Improvement Plan and Schedule
  Gain Sponsor Buy-in
  Test, Assess, Execute
What You Have Achieved
Knowledge Check
CHAPTER 11
Create the Executive Summary: Getting the Recognition 253

The Six Sections of the Executive Summary 254
   Section 1: Project Focus 255
   Section 2: Goals 257
   Section 3: Summary 258
   Section 4: Key Findings 265
   Section 5: Deliverables 265
   Section 6: Appendix 266

Chapter Summary 267
Time Estimate 267
   Create Analytical Tables 267
   Write the Executive Summary 268
What You Have Achieved 268

CHAPTER 12
Business Process Management: BPM and Other Improvement Techniques 269

Business Process Management 270
Business Process Modeling (BPM) 272
Business Process Model and Notation (BPMN) 273
   Gateways 274
   Pools 275
   Swim Lanes 276
   Events 276
   Activity 277
   Loops 277
   Flow Lines 277
Software Products 277
   IBM Blueworks Live 278
   iGrafx Flowcharter 279
   Promapp 279
Other Process Improvement Techniques 280
   TQM (Total Quality Management), Continuous Improvement, and Kaizen 280
   Hoshin Kanri 281
   Reengineering 282
   Six Sigma 284
   Lean 285
   Lean Six Sigma 286
CHAPTER 13
Case Study 1: Training and Development

Background
Step 1: Develop the Process Inventory
Step 2: Establish the Foundation
Step 3: Draw the Process Map
Step 4: Estimate Time and Cost
   Part 1: List Process Activities and Process Time
   Part 2: Identify Annual Volume
   Part 3: Determine the FTE Formula
   Part 4: Determine Employee Costs
Step 5: Verify the Process Map
Step 6: Apply Improvement Techniques
   Benchmarking
   A New Approach
Step 7: Create Internal Controls, Tools, and Metrics
   Internal Controls
   Tools
   Metrics
Step 8: Test and Rework
Step 9: Implement Change
   Communication Track
   Training Track
   Change Management Track
Step 10: Drive Continuous Improvement
Chapter Summary
What You Have Achieved

CHAPTER 14:
Case Study 2: Recruitment Process in Hong Kong

Background
Step 2: Establish the Foundation
Step 3: Draw the Process Map
Step 4: Estimate Time and Cost
   1. List Process Activities and Process Time
   2. Identify Volume
   3. Determine FTE Formula
   4. Determine Employee Costs

Chapter Summary
What You Have Achieved