Aligning Technology with Process

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Properly aligning application software with office process (also called human or knowledge worker process) remains a very high hurdle for companies–regardless of software genre. In fact, during our consulting engagements we virtually always encounter supporting software at least partially–and most often significantly–misaligned to the process that technology should enable.

Empirically, we find three common causes contributing to the problem.

Common threads causing mismatches between software functionality and user needs.

First, and despite an overwhelming body of evidence predicting horrible outcomes, some IT executives persist in implementing software irrespective of process–thus requiring software users to "work to" the application's native functionality. Technology folks call this "running out of the box," meaning little to no software configuration to adapt to the user environment.

These implementations are train wrecks in the making. The larger the implementation, the bigger the crash and the greater the damage. And while the IT executives in question may deserve this fate, their companies certainly don't.

Theoretically, IT education would solve this issue. Realistically, IT folks still hanging onto the old canard that configuring software to the setting is unnecessary and even dangerous–and we're talking meta-level configuration here, not code writing–may be beyond education. The real solution is senior execs recognizing they have an IT problem before it manifests itself and changing personnel.

Second, the business-side managers responsible for their own process abdicate responsibility and drop the whole alignment issue in IT's lap or in a software vendor's lap. Too bad, because in office work environments, companies *must* redesign process before dropping in new automation technology. And to further complicate matters, in office environments redesign means cross-functional process redesign. Office process design focuses primarily on the hand-offs of work and information from function to function and hand-offs between functions and external stakeholders such as customers and vendors. Consequently, no function is a process or data island unto itself. What changes in one function changes another.

Would you hand over cross-functional process design to IT, or to a software vendor? I think not. I hope not.

Figuring out how work and information should flow between entities is simply not IT's job. It's a business-side responsibility. And business-side management needs to determine how work and information should flow, along with how individuals should work, before IT can properly configure application software to match.

Third, and an underlying condition that contributes to factors one and two, aligning technology to process is not only hard work, but remains a mystery to many both on the business-side and in IT. Not to be overly critical, but the difficulty factor certainly contributes to the mystery. Bottom line, the business-side rarely wants to or knows how to redesign process to determine technology needs–and then create all the pictures and words required to guide IT through the configuration stage. And IT is rarely equipped to help business-side counterparts.

Outcomes of ignoring business-side responsibility for technology alignment

We can readily understand why the business-side wants to offload its necessary role in aligning technology to process. Especially because we rarely find process design expertise among management of all office functions combined. And office function managers already have full-time jobs, without taking on process. But life isn't always fair, and abdicating responsibility for the business-side role in aligning technology to process has predictable and very negative outcomes:

- Software ill-suited to user needs
- Little or net gain (or net loss) in time required to perform work
- People working partially “off the system”
- Users abandoning the system and turning it into “shelfware” (as did scads of Siebel Systems users)
- System functionality underutilized
- Round after round of expensive “fixes” to what may be the wrong application
- Starting over with a new system
- Punishment of the innocent and exoneration of the guilty (as in IT or the software vendor blamed for the whole mess)

The Fix

Now that we know the problem, how do we break the cycle? The answer has a simple “what” and a complex “how.”

For the “what,” the business-side has to step up to the plate and accept its required role. There’s no alternative. Even bringing in an outside resource doesn’t discharge this responsibility.

For the “how,” the business-side needs to get about educating itself in the whys and wherefores of office process design plus effective methods of presenting technology support requirements to IT and/or software vendors. It’s not fun work (for most), but consider the alternative.

If you’re up to the task, we’ll offer you a look into HYM’s methodology. First, our Visual Workflow white paper provides a detailed description to a highly effective process design approach for both front office and back office environments. There’s even a special version for Human Resources. Second, our companion white paper, Presenting Process Support Requirements to IT shows examples of the documentation we use and how we assemble the information. Warning, it’s very dry reading–unless the success of your software implementation depends on it.

Good luck out there.