



HIGH-YIELD METHODS

for customer-aligning business strategy, process & technology

Presenting CRM Process Support Requirements to IT

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Presenting process support requirements to IT (or to a software vendor) is half art, half science. The “art” part is documenting for IT how and what information has to function from person to person, from function to function and between outside stakeholders and employees. And that means mapping, but with a twist.

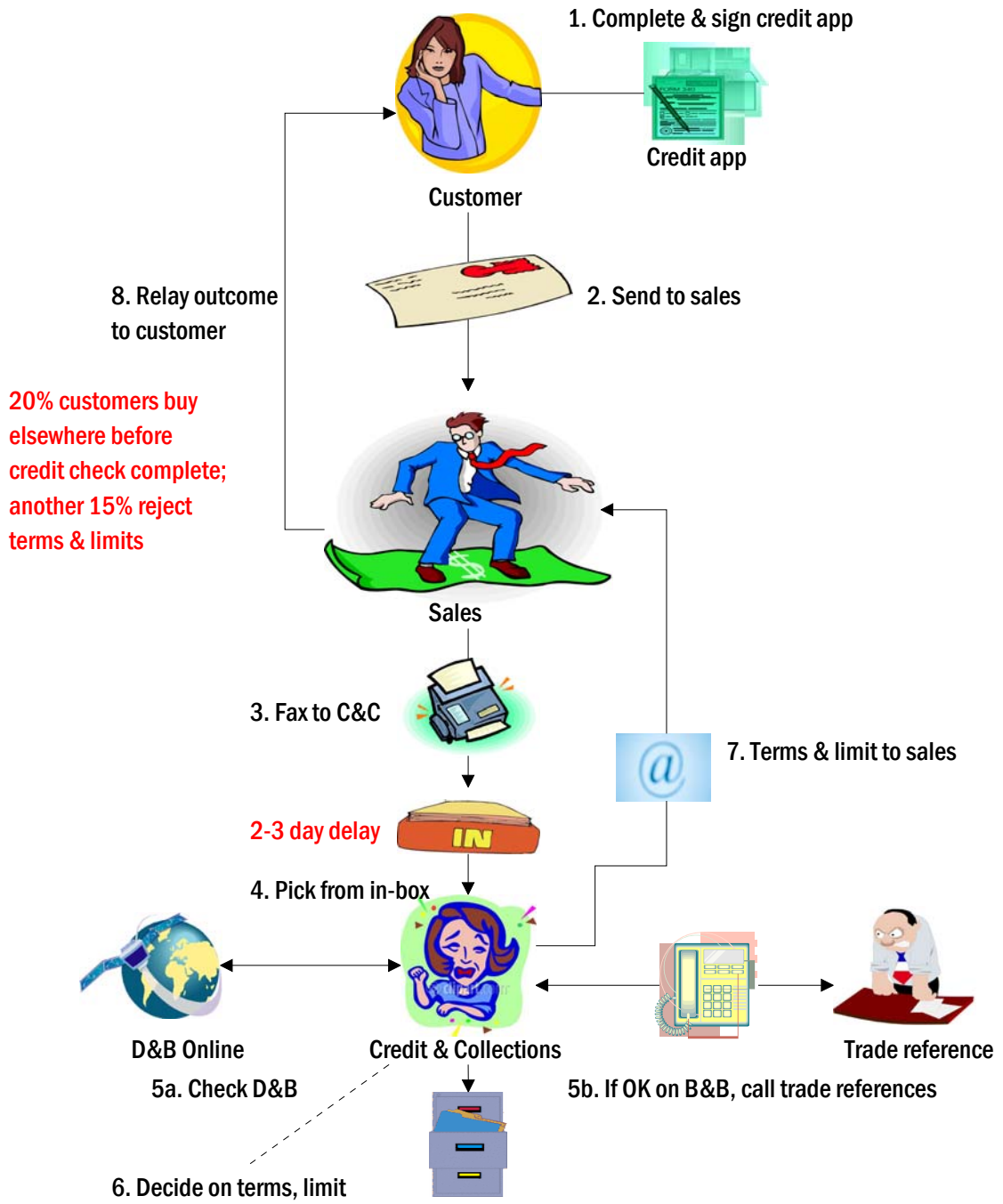
If you’ve read our whitepaper, [Visual Workflow](#), you’ll already be familiar with how VW maps workflow and information flow as a single entity, and why VW maps use literal symbols instead of process symbology. But if you haven’t, in office process (also called human process or knowledge worker process) work relates to information much differently than in manufacturing. Work is creating, modifying, receiving and sending information, which makes workflow and information flow inseparable.

Regarding the unusual mapping style, mapping with literal symbols effectively communicates with business-side people with no prior process experience. That’s a key difference between VW and manufacturing process approaches.

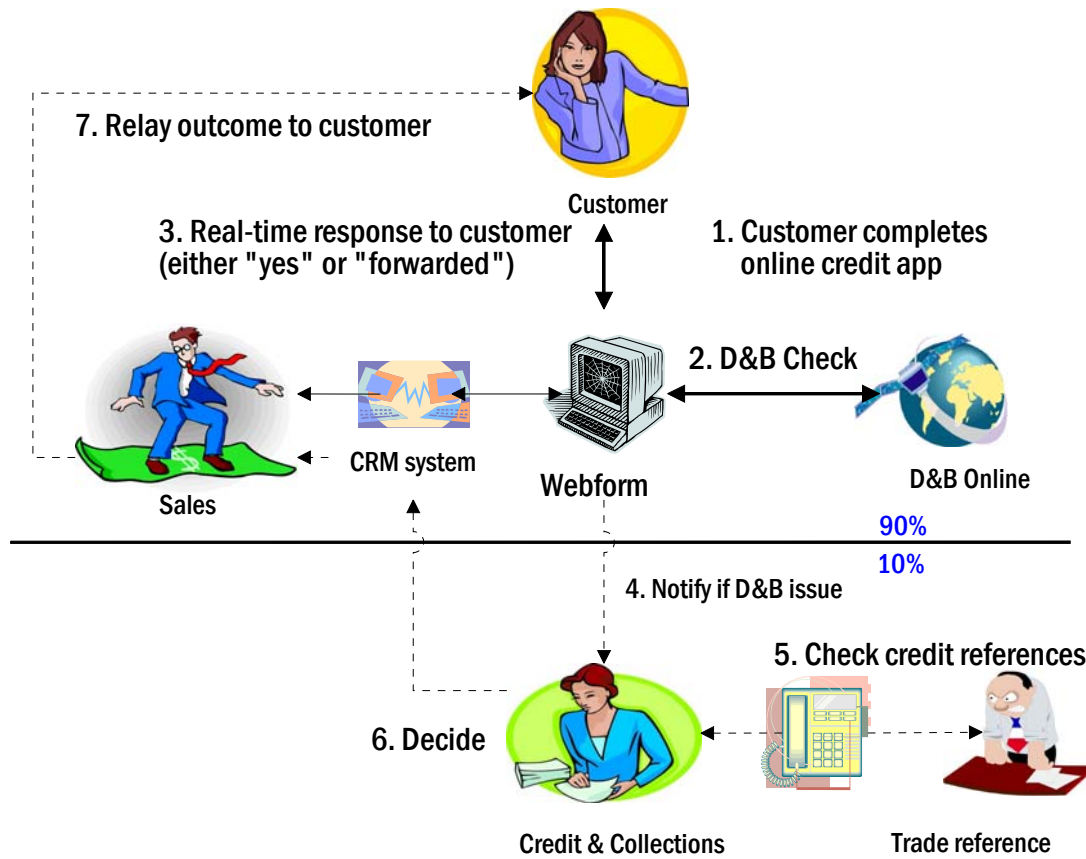
Three communication steps

An important side benefit of mapping workflow flow/information flow together is simultaneously producing information flow documentation for IT, which can work right off your workflow maps to identify the requisite systems architecture for supporting process. Here are sample “as is” and “to be” maps of the same function.

As-Is Pictograph-Granting Credit



To-Be Pictograph—Granting Credit



FYI, if you're going to build maps like this absolutely use SmartDraw rather than Visio or iGrafx. The former offers far superior functionality.

Step two

Here's where we switch to science. With workflow designed and documented, the business-side has to drill down to the individual work process level—as in how can individual roles (sometimes individual people) best perform their work in accordance with the flows. It's important to note that individual work process is a dependent function of workflow/information flow—important because process designers trained in manufacturing often start by redesigning individual workflow, a total dead end.

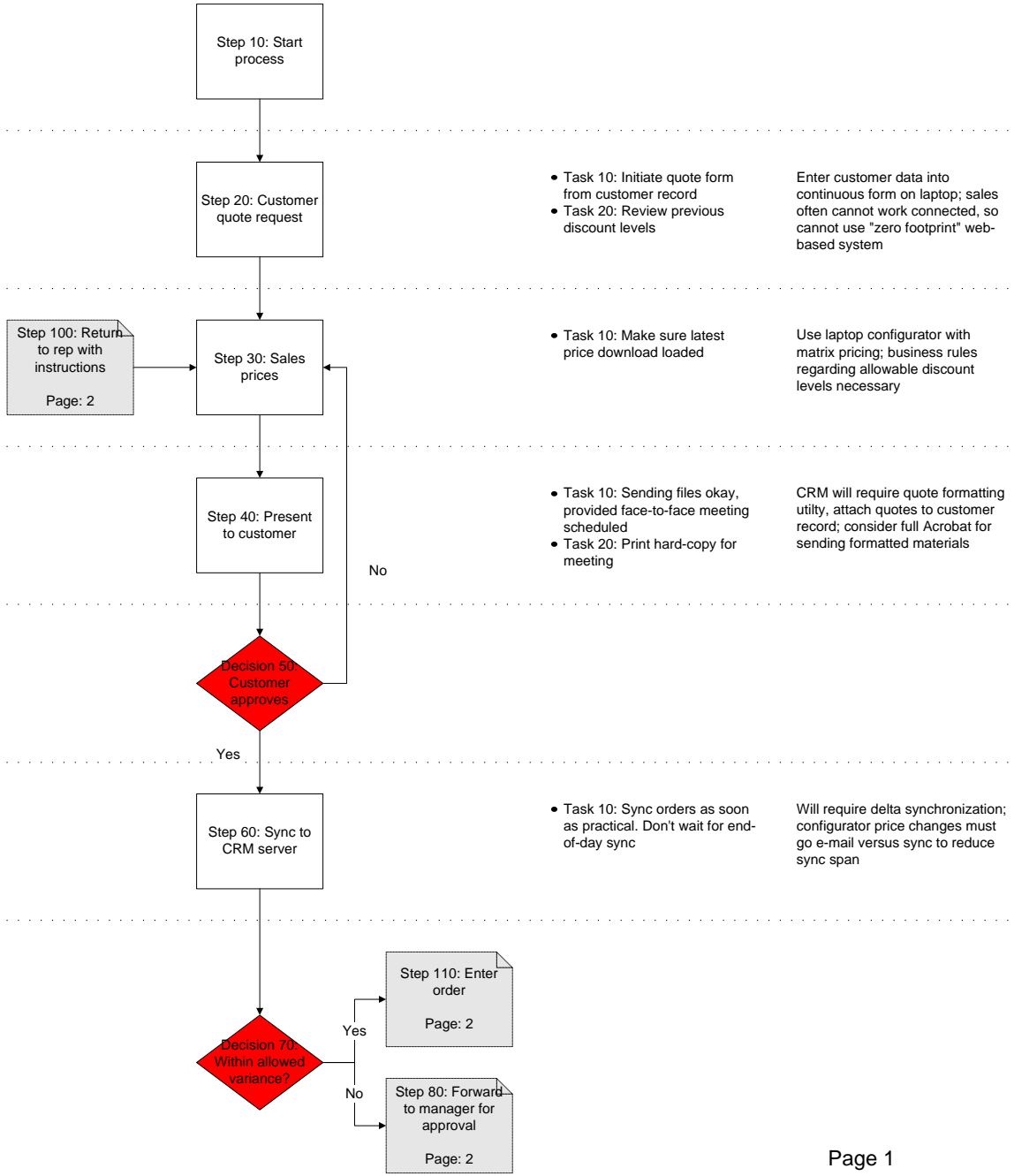
During this drill down process, the folks mapping individual process should note specific user technology requirements at each step and task. When the mapping is complete, the business-side will know what software systems they'll need and how to select from the pool of available applications. In fact, these maps provide excellent background for software presenters responding to an RFP or demonstrating that their application can meet requirements.

Here's a sample page from an individual work process map.

Visual Workflow Sample - Process View
Process 10: "To Be" Order Entry

ProCarta v1.8.1
Feb 23, 2003 5:33pm

Process Flow	Task	Journal
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Another FYI. Mapping individual work process (as opposed to workflow) using a SmartDraw-equivalent application can take an eternity. For example, documenting bank teller process alone can produce 75 or so pages of complex maps (more than some entire companies require). HYM uses an automated mapping system called ProCarta. Unfortunately, we no longer recommend it to clients because the developer has morphed from a software seller into a consulting company, and we're unsure of future support and updates to keep pace with Microsoft changes.

The good news is that several at least partially automated process programs have hit the market, including FlowBreeze, TaskMap and ProcessForge's Vector. The ideal is an app that converts text into maps with a single mouse click, as ProCarta does. Second best is an app that creates text from maps (usually in Excel), which will be easier to find. In all likelihood, we're going to see an influx of new speed mapping software as interest in office process grows.

Step three

We'd love to say that business-side folks can just turn over individual work process maps to either IT or software vendors and let them ferret out user-level configuration requirements. Rarely can an IT department take these maps and run with them. There's far too much left unsaid. And in all our years consulting in the office process space, we've run across exactly one software vendor capable of pulling this off (Optima Technologies). So one more documentation step is needed, and what a step it is.

Giving IT or a software vendor adequate guidance to properly configure and office software application means spelling out:

- All data fields and their characteristics
- All reports needed (which influences data table design)
- All views (screens), potentially including different views for different user groups
- All data forms
- User navigation patterns

HYM communicates this information using a form called [Fields, Forms & Views](#) (FFV).

Here's part of a page:

Element	Name	Type	Source	Required?	Menu?	Read-only?	Comments	
Header	Contact Information	Label						
Field	Contact	Field	Key-entry				Search for duplicates	
Field	Company	Field	Look-up or key-entry	✓	✓		Search for duplicates; pop dialog box for new company set-up	
Field	Address1	Field	Key-entry or auto-fill				Auto-fill if company selected	
Field	Address2	Field	Key-entry or auto-fill				Auto-fill if company selected	

A typical FFV document will take up 40 to 60 pages. HYM prepared one recently that required 120+ pages because of the extreme complexity of the application.

Assembling an FFV document requires a business-side person thoroughly knowledgeable of the “to-be” process overall but also conversant in application software. We suggest a very detail-oriented individual with hyper-focus.

The trade-off

Obviously, properly communicating process support requirements takes lots of work by the business-side. But before “passing” on it, consider the alternative:

- 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)

That’s hardly an alternative.