

# Managing Work as a Process

Tony Aloise

**LIFE SOLUTIONS**  
N E T W O R K



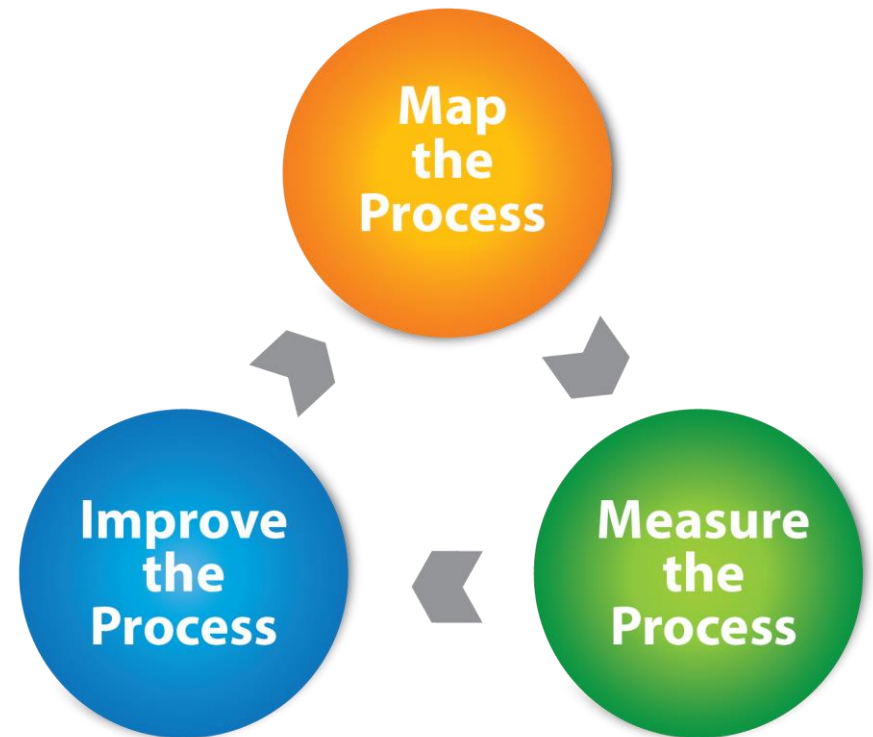
# Vision for Mentoring Plus

- Capability
- Effectiveness
- Efficiency
- Sustainability



# Process Management

- The application of knowledge, skills, tools and systems to
- define, measure, control, report and improve processes
- with the goal to meet customer requirements.



# Processes vs Projects

	Process Management	Project Management
Best Used for	On-going, (frequent), repeatable work where predictability or improvement is desired	One-time work (with beginning and end) where risk of delay has consequences
Examples	Volunteer recruiting Maintaining your car	Capital campaign Building a house
Tools	Flow chart	Gantt chart
Leadership	Process Owner	Project Manager

# Work Process Master Plan

- All work is defined
- With targeted owners (and PACE)
- And clear priorities



# Work Process Master Plan

Top-Level	Sub-Level (Bold Blue font = Key Processes for 2019)	Key Element or Measure	Status	Process Documentation	Effort	Process Owner
Governance	<b>Board Recruiting, Onboarding, Development</b>	Board members (10) have active defined role and contribution		Process Summary	Improve	Board Chair (Ed)
	<b>Board meetings and committees</b>	Committees deliver strategic plan tasks		Process Summary	Breakthrough	Board Chair (Mickey?)
Leadership	Team Meetings	Agenda accomplished		None	Maintain	Robin
	<b>Quarterly Reviews</b>	Dashboard and Masterplans are updated	New	None	Start in Apr	Chris
Programming	<b>Program capacity (intake)</b>	# new teens at capacity (35+)		Process Summary	Improve	Robin
	Curriculum Development	Quality lesson plans		Process Summary?	Maintain	Robin
	Curriculum Delivery	Evening routines executed according to plan		Process Summary	Maintain	Robin
	Teen Case Management	Home visits and case documentation		Process Summary	Maintain	Robin
	Teen Goal Setting	Goals met inc skill attainment		Process Summary	Improve	Robin
	Facility Management	Safe, clean and welcoming		Punch list	Maintain	Robin
Planning	<b>Strategic Planning</b>	Documented plan		Informal	Improve	Chris
Transparency & Accountability	Compliance	Pass audit			Improve	Board Chairs
Financial Management	<b>Budgeting &amp; Finance Comm Reviews</b>	Quarterly Board reviews		Informal	Maintain	Don Able
Fundraising	<b>Donor Solicitation-Individual</b>	Goal met		Process Summary	Breakthrough	Chris
	<b>Donor Solicitation-Corporate</b>	Goal met		Process Summary	Improve	Chris
	Grant writing (inc. counties)	Goal met		Informal	Improve	Chris
	Special events	Goal met			Improve	Chris
Communications	<b>External: Awareness, Social Media, Newsletter</b>	Plan executed		Marketing plan	Improve	Billy
	Annual Report	Report published on-time		No	Maintain	Chris
Human Resources	Staff Development	Evaluations and staff development plans completed		Process Summary	Maintain	Robin
	Ambassadorship				New	

# Process Owner Role

- Design, deliver and improve the process!




# Process Owner Role Skills

- I can document a process, e.g. step-by-step procedures or a flowchart.
- I can improve a process to better meet customer requirements.
- I can “map” processes into an integrated masterplan so that I can “see” all work in the organization.





 <b>Donor Solicitation-Corporate Process Summary</b> Process Owner: Chris Saunders Issue Date: January 17, 2017																												
<b>PROCESS PURPOSE AND PRODUCTS</b>  <i>Why is it important that this process exists?</i>	<ul style="list-style-type: none"> <li>Fundraising through businesses, small business to large corporations.</li> </ul>																											
<b>CUSTOMERS AND REQUIREMENTS</b>  <i>The names of the people who receive the products/services of the process and their requirements.</i>	<ul style="list-style-type: none"> <li>Executive Director: sufficient funds for effective programming and staffing (can't operate without money).</li> <li>Board: sustainability.</li> </ul>																											
<b>PROCESS STEPS</b>  <i>Outline timing and involved people of key steps.</i>	<table border="1"> <thead> <tr> <th>Key Steps</th> <th>Frequency/Timing</th> <th>Who</th> </tr> </thead> <tbody> <tr> <td> <ul style="list-style-type: none"> <li>Targets defined: company and person.</li> </ul> </td> <td>Annual</td> <td>ED</td> </tr> <tr> <td> <ul style="list-style-type: none"> <li>Make 1<sup>st</sup> and 2<sup>nd</sup> contact with people within organizations: -phone calls -hard copy letters</li> </ul> </td> <td>Ongoing</td> <td>ED</td> </tr> <tr> <td> <ul style="list-style-type: none"> <li>Process responses: -gift -no response -tour -personal lunch -newsletter -volunteer</li> </ul> </td> <td>Ongoing</td> <td>ED</td> </tr> <tr> <td> <ul style="list-style-type: none"> <li>Identify influential people if follow-up and 3<sup>rd</sup> contact is needed.</li> </ul> </td> <td>Ongoing</td> <td>ED</td> </tr> <tr> <td> <ul style="list-style-type: none"> <li>Tracking and reporting.</li> </ul> </td> <td>Ongoing</td> <td>ED</td> </tr> <tr> <td> <ul style="list-style-type: none"> <li>Thank you's for all gifts</li> </ul> </td> <td>Ongoing</td> <td>ED</td> </tr> <tr> <td> <ul style="list-style-type: none"> <li>Personal touches for gifts &gt; \$500.</li> </ul> </td> <td>Ongoing</td> <td>ED</td> </tr> <tr> <td> <ul style="list-style-type: none"> <li></li> </ul> </td> <td></td> <td></td> </tr> </tbody> </table>	Key Steps	Frequency/Timing	Who	<ul style="list-style-type: none"> <li>Targets defined: company and person.</li> </ul>	Annual	ED	<ul style="list-style-type: none"> <li>Make 1<sup>st</sup> and 2<sup>nd</sup> contact with people within organizations: -phone calls -hard copy letters</li> </ul>	Ongoing	ED	<ul style="list-style-type: none"> <li>Process responses: -gift -no response -tour -personal lunch -newsletter -volunteer</li> </ul>	Ongoing	ED	<ul style="list-style-type: none"> <li>Identify influential people if follow-up and 3<sup>rd</sup> contact is needed.</li> </ul>	Ongoing	ED	<ul style="list-style-type: none"> <li>Tracking and reporting.</li> </ul>	Ongoing	ED	<ul style="list-style-type: none"> <li>Thank you's for all gifts</li> </ul>	Ongoing	ED	<ul style="list-style-type: none"> <li>Personal touches for gifts &gt; \$500.</li> </ul>	Ongoing	ED	<ul style="list-style-type: none"> <li></li> </ul>		
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<b>TOOLS</b>  <i>Tools used to execute the process.</i>	<ul style="list-style-type: none"> <li>Target list (Excel).</li> <li>Standard e-mail and phone script.</li> </ul>																											
<b>MEASURES</b>  <i>What measures are used to know if the process is performing and that customer requirements are being met?</i>	<ul style="list-style-type: none"> <li>Raise \$45,000 in 2018.</li> <li># of business that give.</li> <li>Average size of a gift.</li> <li>Make 5-10 "asks" each month.</li> </ul>																											
<b>ASSESSMENT OF SYSTEM PERFORMANCE</b>  <i>How is the process performing?</i>	<ul style="list-style-type: none"> <li>Red. Hasn't been sufficient attention and ownership.</li> </ul>																											
<b>IMPROVEMENT PLAN</b>  <i>What is the plan to improve the effectiveness of the process?</i>	<ul style="list-style-type: none"> <li>Develop a list of alternate responses for non-givers.</li> <li>Research that leads to better targets.</li> <li>Identify and develop more "askers".</li> <li>Develop and expectation for all Board members to give \$2500 or raise \$2500.</li> <li>Decide how to pay for lunch?</li> <li>Benchmark or continued learning.</li> </ul>																											

# *You Get What You Measure*

- Outcome metrics
- Process metrics

# Exercise

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# Improving Processes

- Talk to customers
- Monitor metrics
- Experiment
- Benchmark

# Moving Forward

- Continue documentation
- Focus on process improvement actions
- Use informally in 1:1 meetings
- Use formally in a quarterly review
- Assign a Process Owner



## Creating a Culture of Process Ownership

Last Update: January 20, 2019

Document Owner: Tony Aloise

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- Leaders demand process thinking and documentation.
- Leaders can describe in a sentence or two what process management is intended to accomplish, i.e. effectiveness, capacity and sustainability.
- You get what you measure.* Outcome and process measures are agreed-upon and tracked. Keep it simple. Poor results are looked at to discover root cause.
- The Process Masterplan is updated and reviewed formally at least quarterly, i.e. it is treated with importance.
- Managers discuss process status and improvement needs regularly in 1:1's with direct reports. There is alignment on status (green, yellow, red) and needed improvements. There is more focus on the process rather than the person.
- Process Summaries are reviewed and formally approved once per year.
- Roles are clear. Process Owners guide the processes but may not be approvers. PACE: Process Owner, Approver, Contributor and Executor.