

perandy




perandy

Rédaction collaborative de cahier des
charges pour les projets de transformation

INTRO

WELCOME.

For managers, project owners, project managers and business unit directors who are ready to lead their teams through organizational change while improving employee happiness.



**Your journey to real,
tangible transformation
begins here.**

DIGITAL TRANSFORMATION **AND YOU**

Enable operational teams to apply some of the most proven and reliable methods from Google, Microsoft and Amazon to to their own work in order to transform your organization from within.

“



What is digital transformation?

01

- 1) Moving manual and physical actions onto digital tools
- 2) Automating tools and apps to handle low-value work

What is an operational project?

02

Programs, projects and processes related to internal, operational work done by a single team or across teams

What is a process?

03

A series of tasks, steps or actions that guide you from a beginning state to an end state.

What is process optimization?

04

- 1) Organization of work to handle an uninterrupted flow
- 2) Order in which actions are executed
- 3) Digital transformation of actions

The challenge you face today, even as part of an ambitious organization, is not one of transformation, digitalization or automation.

Rather, it's about communication!

WHAT YOU WANT



HOW TO GET WHAT YOU WANT

WHAT YOU GET



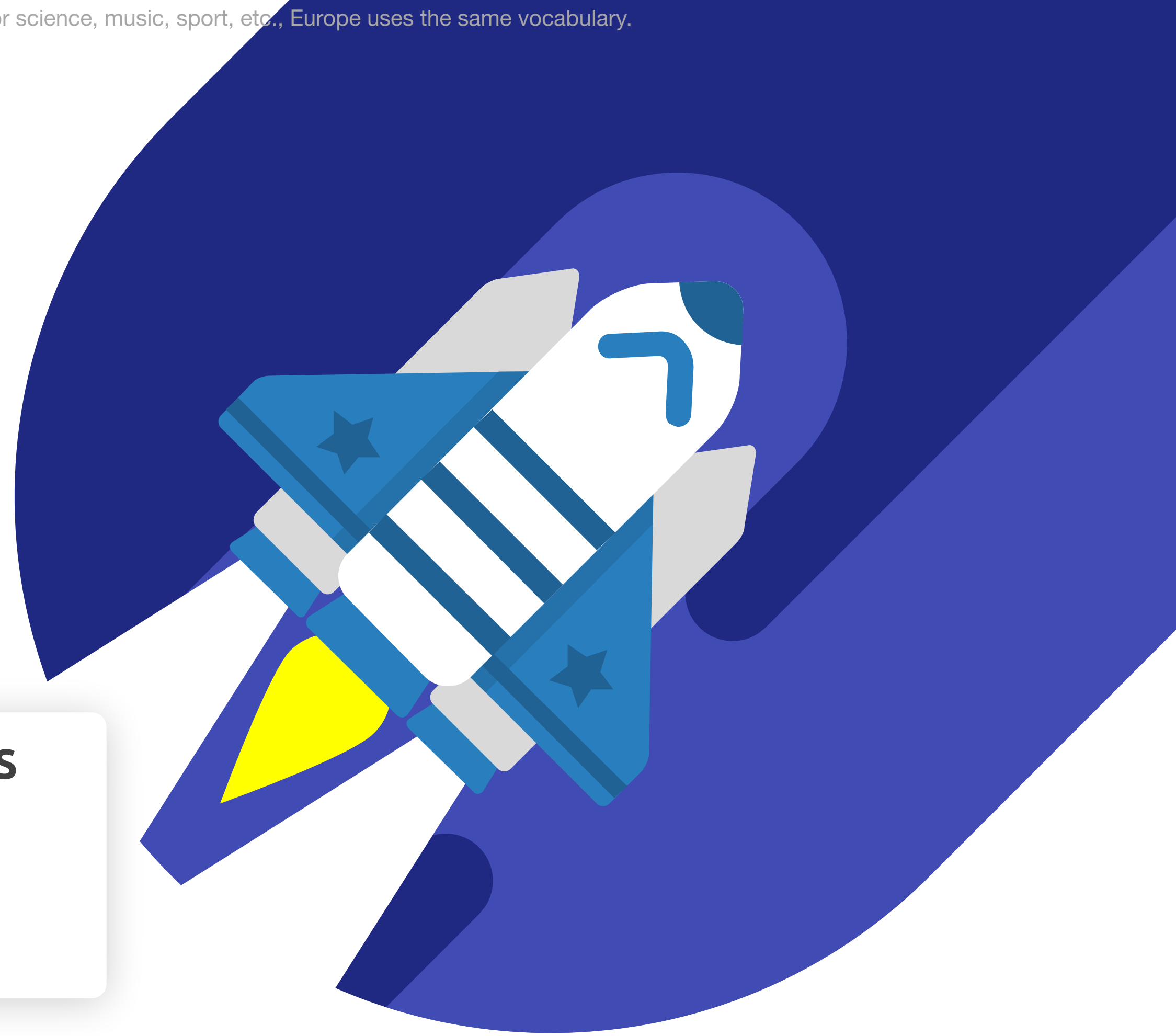
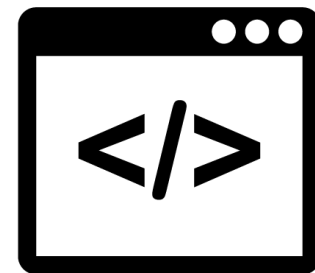
GOALS

Concrete Deliverables

DOCUMENTATION



TECH SPECS



PROCESS SELECTION

Choosing a process

- Repetition
- Time
- Copy-paste
- Handoffs
- Precision
- Decisions
- Conditions



i Use a scale of 1 to 5 to score each aspect of a process you're considering. Add up the scores for each process to calculate which process might be best to undertake in the workshop.

Example process candidates for a retail bank

Process Name	Repetition	Time	Copy-paste	Handoffs	Precision	Decisions	Conditions
Open account	5	4	3	2	1	1	4
Close account	3	2	3	1	1	1	2
Personal loan validation	2	4	2	3	3	3	4
Mortgage validation	3	3	5	4	4	4	5
Life insurance investment	1	2	1	2	2	2	2
Overdraft management	4	4	1	2	2	3	2
Asset recovery	2	5	5	5	4	3	2

Exercise 1: Process candidates

Process Name	Repetition	Time	Copy-paste	Handoffs	Precision	Decisions	Conditions



PARTICIPANT SELECTION

Participant Selection

- 01 Procedural consensus for similar roles
- 02 High level of detail and specificity
- 03 Fill in knowledge gaps
- 04 Intra-team and cross-team agreement

Example participant selection for asset recovery

Team	Role	Operational	Technical	Management
Branch office	Account manager	x		
Branch office	Administrative assistant	x		
Branch office	Branch manager			x
Back office	Loan manager			x
Back-office	Loan solutions expert		x	
Recovery service	Recovery specialist	x		
Recovery service	Bailiff	x		

Exercise 2: Participant Selection

Team	Role	Operational	Technical	Management

GUIDELINES

Transform or innovate?

Depending on the maturity of your process and the experience of your team members you can document a process in 2 different ways.

01

Existing process

- ✓ Collaborate
- ✓ Build
- ✓ Agree

02

New process

- ✓ Diverge
- ✓ Converge
- ✓ Vote

INTRO

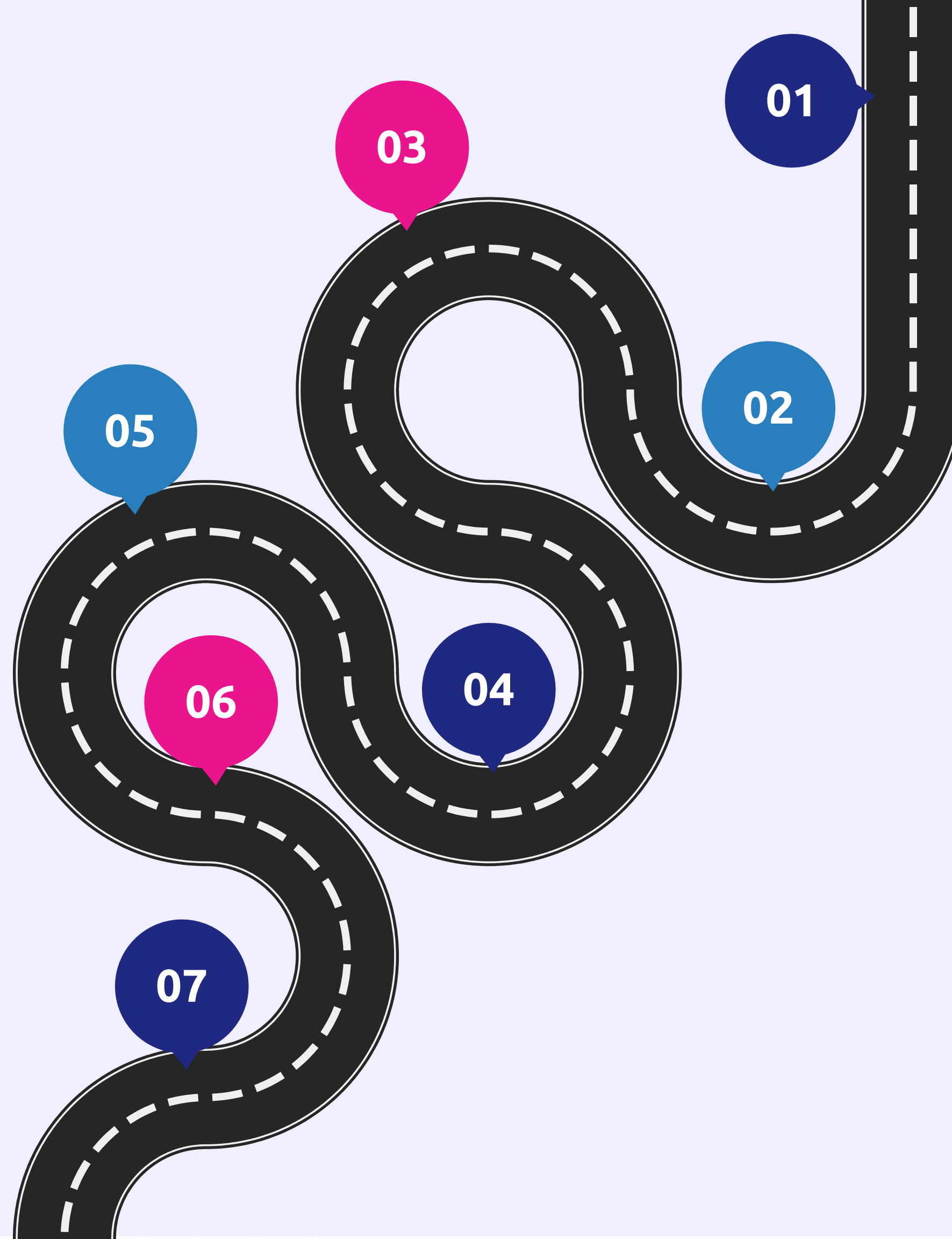
SESSION ONE.

For operational talent that wants to add value, do away with low-value manual work in order to work more efficiently, with less stress.

**Wicked fast and easy
process documentation
for operational teams.**

Today's agenda

- 01 Welcome and introduction
- 02 Meeting your fellow stakeholders
- 03 Methodology
- 04 Workshop guidelines
- 05 Tasks workshop
- 06 Actions workshop
- 07 Measurement and performance workshop

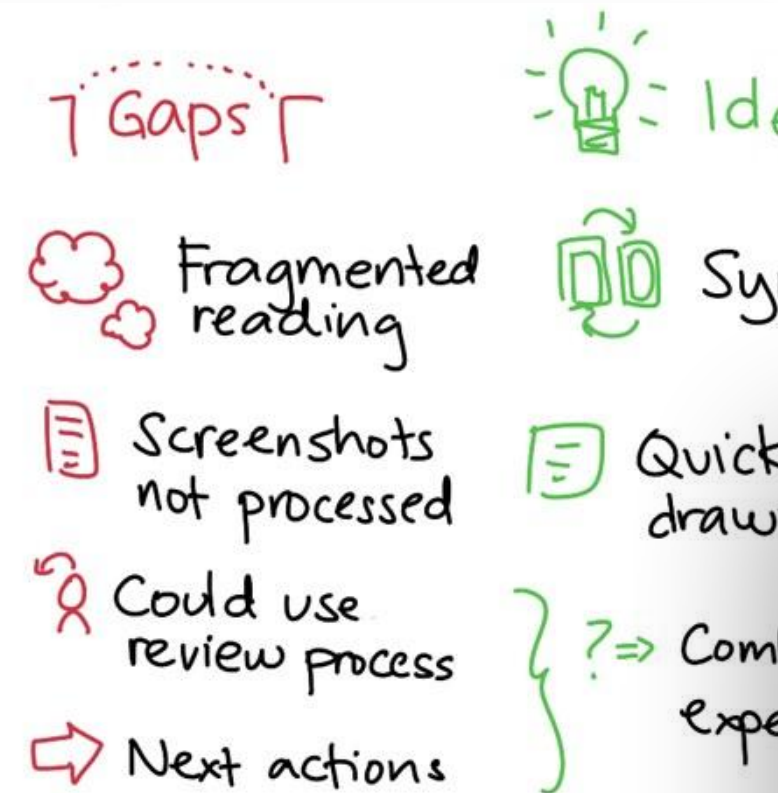


INTRO

What is a process?

- Composed of every step that results in one or more end states
- A reference point that all other actions can be attached to
 - An event or a specific instant
 - A precise action that is done based on time
- Composition
 - Ideal sequence (Core steps)
 - Divergences
 - Merging sequences

ACTION
NAMES AND
DESCRIPTIONS



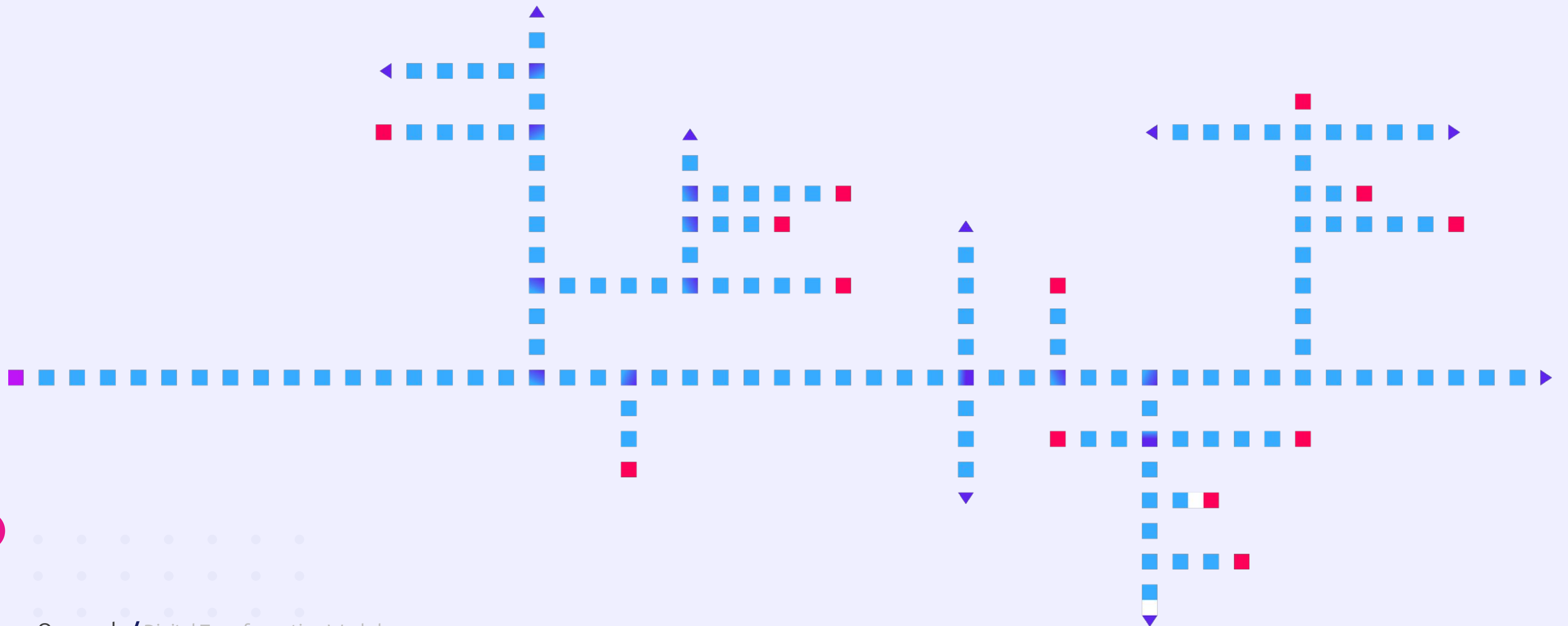
STAKEHOLDERS
AND ROLES



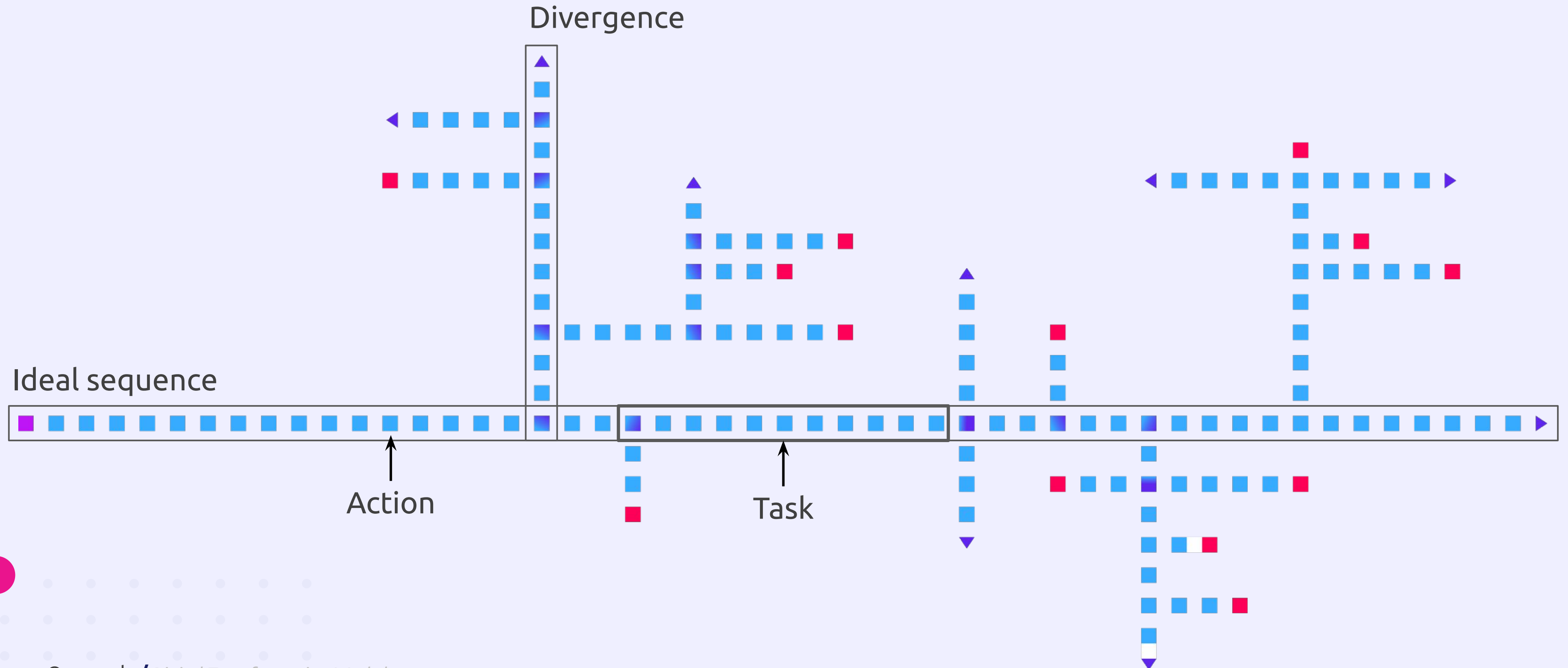
TOOLS



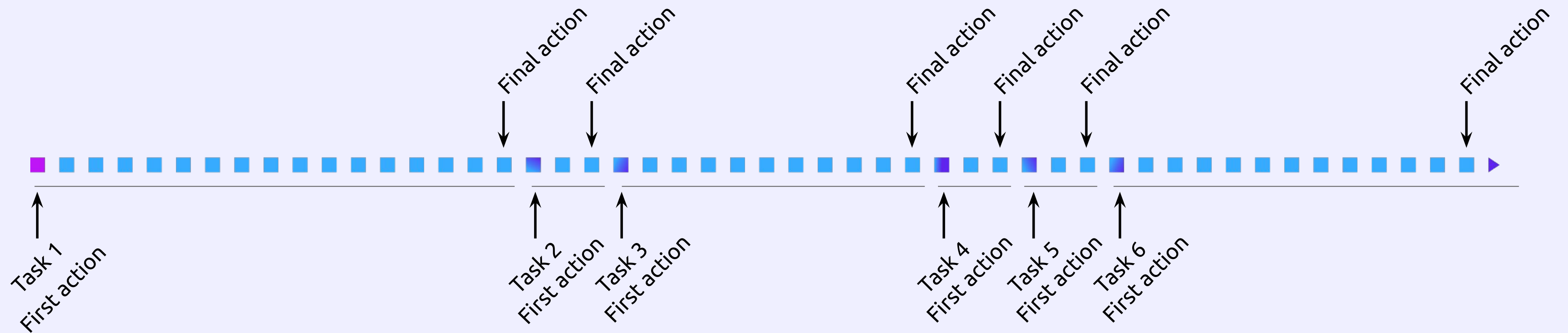
What is a process?



What is a process?



What is a process?



INTRO

Today's process

YOUR COMPANY NAME

*Type the name of the
process you've chosen.*



*Name the beginning of the
process you've chosen.*



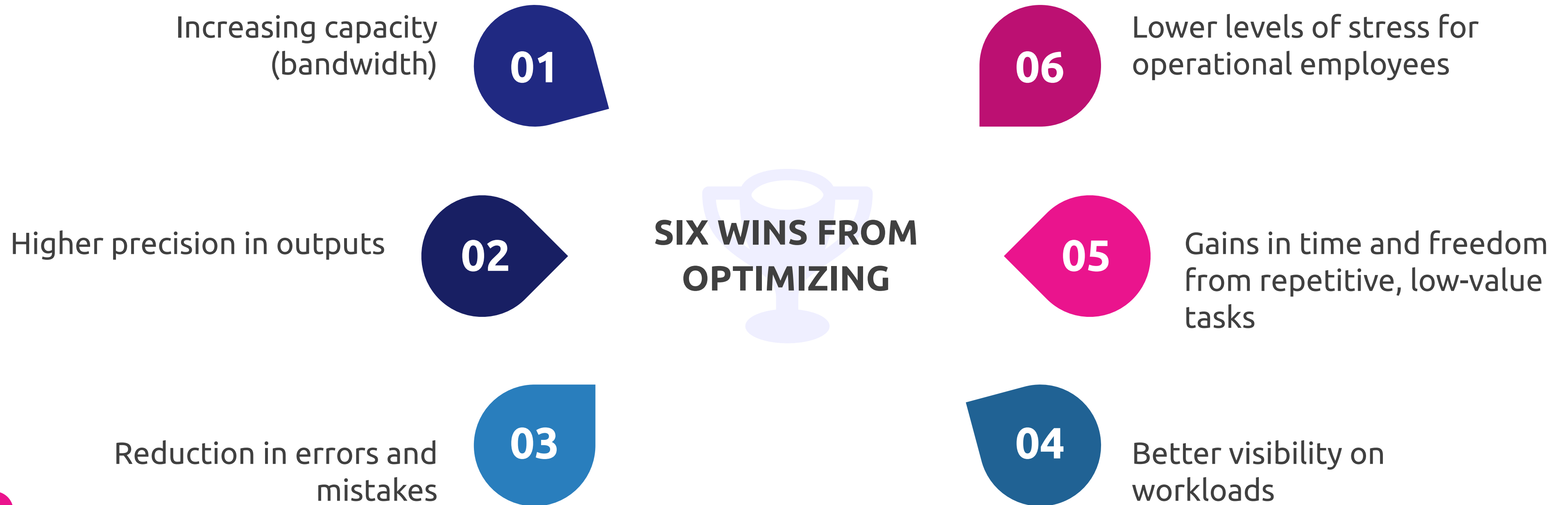
*Name the end of the
process you've chosen.*

EXAMPLE

Example process

Task	Action	Role	Tool
Gather job information	Send form to hiring manager for job info	Talent manager	Outlook
	Complete job info and description in form	Hiring manager	Microsoft Forms
	Receive notification that form is filled	Talent manager	Outlook
	Review job description and post info	Talent manager	Microsoft Word
	Send finalized description for validation	Talent manager	Outlook
	Approve description	Business manager	Outlook
Post job to hiring networks	Post job to internal job board	Talent manager	Thaleo
	Copy information to LinkedIn	Talent manager	LinkedIn
	Post job to LinkedIn	Talent manager	LinkedIn

Defining process optimization



THE OPERANDY APPROACH.

Iterate towards a digital and automated organization that places human work at the center of value creation.

- ✓ **Foundational documentation**
Build a step-by-step linear version of the process that documents each specific action.
- ✓ **Estimate performance**
Estimate the current performance of the process in order to select where to optimize.
- ✓ **Digital transformation**
Transform manual and physical documentation into digital and automated specs for developers.
- ✓ **Invest based on ROI**
Make in an investment in the digitalization and automation of your actions based on expected gains.
- ✓ **Monitor processes and iterate**
Watch as processes unfold in real-time and work towards automated actions.

Before we begin

QUESTIONS?

WHO ARE YOU?

Introduce yourself to the other participants. You may know each other already, but your colleagues may not know the difficulties and constraints you encounter in your work.

- ✓ Your name
- ✓ Your team(s) and role(s)
- ✓ Your frictions or pains today
- ✓ What you hope to get from this workshop

EXAMPLE

The deliverable we're working towards today

Task	Action	Role	Tool	Time to complete	Importance
Gather job information	Send form to hiring manager for info	Talent manager	Outlook	5	5
	Complete job info and description in form	Hiring manager	Microsoft Forms	15	5
	Receive notification that form is filled	Talent manager	Outlook	0	3
	Review job description and post info	Talent manager	Microsoft Word	10	4
	Send finalized description for validation	Talent manager	Outlook	3	3
	Approve description	Business manager	Outlook	10	4
Post job to hiring networks	Post job to internal job board	Talent manager	Thaleo	15	5
	Copy information to LinkedIn	Talent manager	LinkedIn	5	3
	Post job to LinkedIn	Talent manager	LinkedIn	2	3

Methodology



THINK LINEAR: Your first process should represent an ideal version, without divergences or merges.

TASKS

1. Describes a group or series of specific steps that result in a major step of a process being completed;
2. Establishes a context in which work is done to achieve an output that adds value to a previous task and contributes to the output of a next task.

STAKEHOLDERS & ROLES

Describes a group of people with the same responsibilities, assigned to an action.

ACTIONS

The smallest units of work that help break down tasks into smaller steps that can be analyzed and optimized individually.

TOOLS

Physical devices, software, mobile apps, databases and even paper guides or knowledge bases that assist a person in completing an action.

GUIDELINES

Basic rules for collaboration

Because we have a limited time, we use a diverge/converge/vote approach in order to find consensus quickly and document as much of a process as possible.

DIVERGE

Work independently from your colleagues to put down your own ideas and think about the way you would personally see the process unfolding.



VOTE

If you encounter differences with your colleagues, use a voting mechanism to come to a consensus on how a process should work. You get 5 points that you can allocate to any task or action you want to see included.

CONVERGE

Share your version of the process with your colleagues and listen to their ideas. Talk about your differing points-of-view and try to consolidate.



LEARN

WHAT IS A TASK?

Unit of work that is independently evaluable

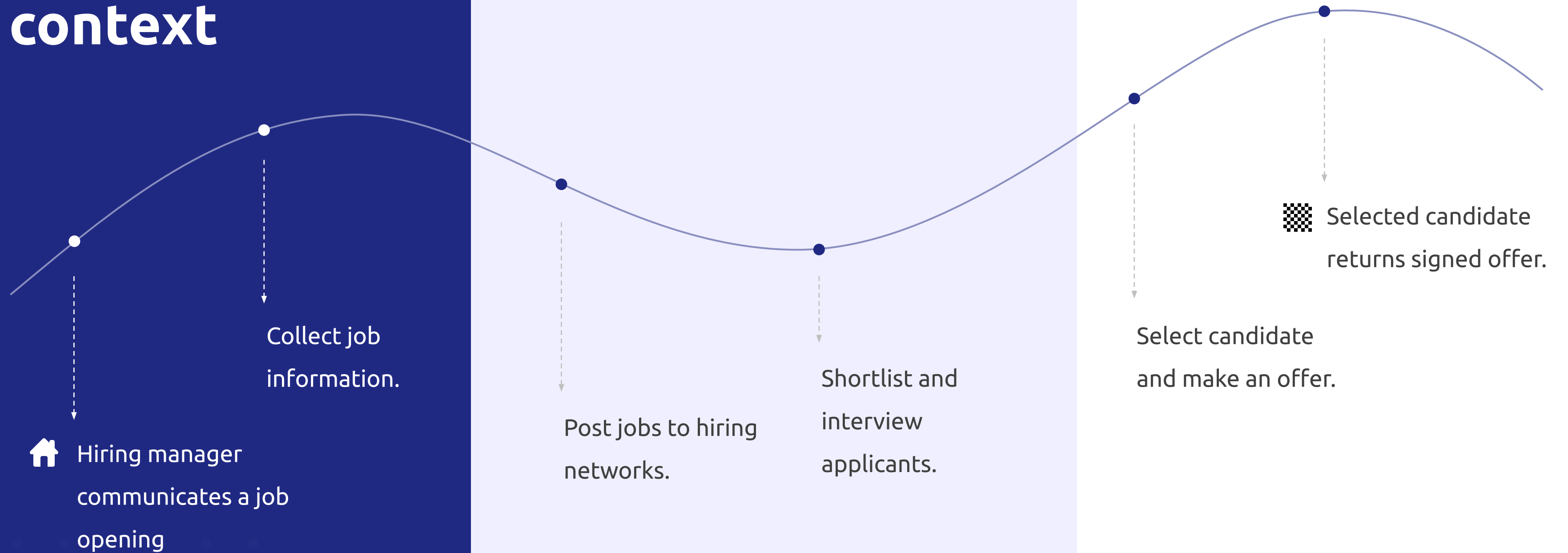
Low level of specificity with high level of comprehension

Describes a series of actions that move work forward

Separation of tasks by nature of work, conditions or decisions

LEARN

Tasks in context



EXAMPLE

Example task list

Task order	Task name
1	Hiring manager communicates a job opening
2	Collect job information and description
3	Post jobs to hiring networks
4	Discuss applicants and create a shortlist
5	Setup and conduct interviews
6	Select a candidate and make an offer
7	Receive signed offer and hiring information from selected candidate

EXERCISE

Exercise 1: Task list

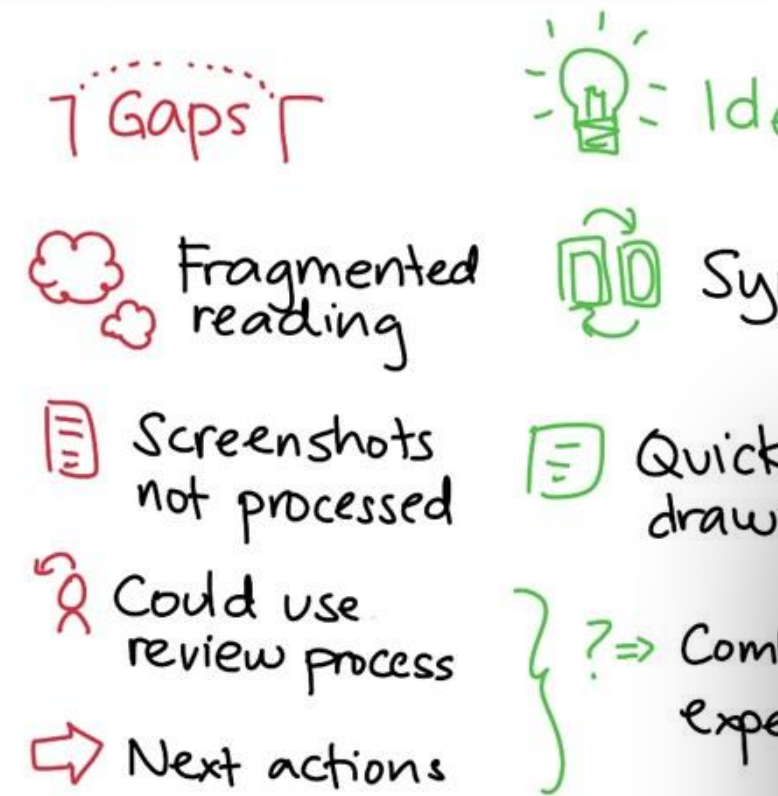
Task order	Task name
1	
2	
3	
4	
5	
6	
7	

LEARN

Breaking down tasks into actions

- Most specific unit of work that can be defined
- Refers to actions that can be marked as done
- Made up of descriptive components related to the nature of the action
 - Tool
 - Stakeholder

ACTION
NAMES AND
DESCRIPTIONS



STAKEHOLDERS
AND ROLES



TOOLS

LEARN

TIPS AND TRICKS

✓ **Name your actions by starting with a verb**

Examples: open, copy, fill, delete, update, etc.

✓ **Keep action names short**

Use them to identify actions. You'll be able to elaborate on them with descriptions later;

✓ **Think about physical actions for completing tasks**


Examples : clicking a button, entering data, reading information, etc.

EXERCISE

Exercise 2: Actions


Task	Action	Role	Tool


2019 – Your Subtitle Text

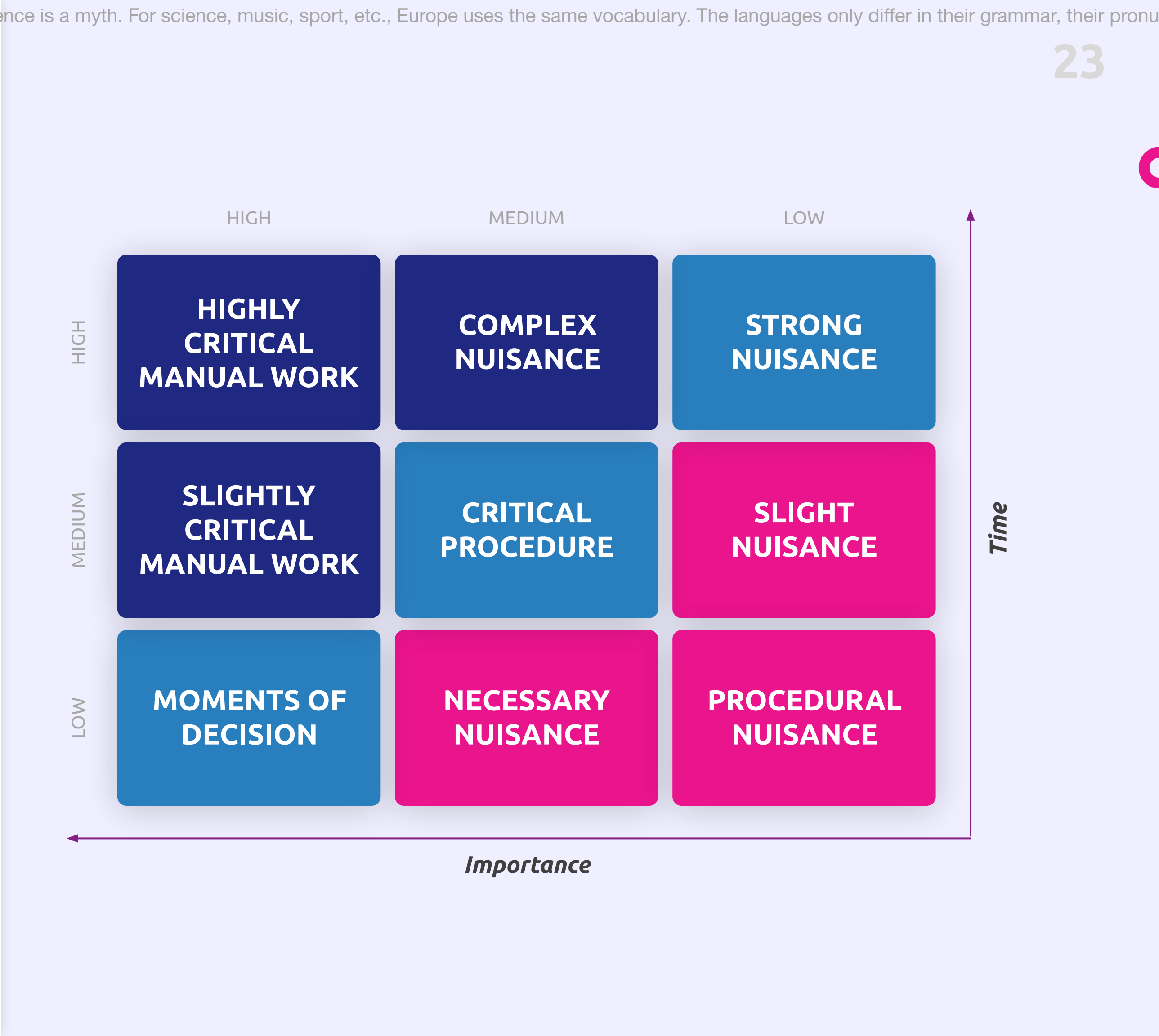


LEARN

Measurement and performance

 Time spent

 Importance



LEARN

Measurement and performance

● TIME TO COMPLETE

Manual time spent completing an action

Information used for financial calculations and prioritization

● IMPORTANCE

Measure of the level of criticality

High importance = high value

EXAMPLE

Example measurement

Task	Action	Role	Tool	Time to complete	Importance
Gather job information	Send form to hiring manager for job info	Talent manager	Outlook	2	2
	Complete job info and description in form	Hiring manager	Microsoft Forms	20	4
	Receive notification that form is filled	Talent manager	Outlook	0	1
	Review job description and post info	Talent manager	Microsoft Word	10	4
	Send finalized description for validation	Talent manager	Outlook	2	2
	Approve description	Business manager	Outlook	20	4
Post job to hiring networks	Post job to internal job board	Talent manager	Thaleo	15	2
	Copy information to LinkedIn	Talent manager	LinkedIn	10	1
	Post job to LinkedIn	Talent manager	LinkedIn	1	2

EXERCISE

Exercise 3: Measurement

Task	Action	Role	Tool	Time to complete	Importance

NEXT TIME.

● Prioritization

● Data

● Orchestration

● Digitalization

● Automation

● Action content and rules

● Divergences and merges





THANK YOU!

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