Overview of Process Streamlining

(Updated May 16, 2006)

Process Streamlining Defined

Process streamlining (PS) is defined as:

• Improvement of an overall process by improving the individual steps of the process.

The overall goals of process streamlining are to change a process, both for the client and the process owner, to:

• Reduce time to complete the steps and the overall process
• Reduce complexity
• Reduce bureaucracy
• Increase adaptability
• Meet client expectations

Reasons to do a Process Streamlining Project

Why do a process streamlining project? We may think that our processes are fine as they are. We use them every day and they seem to work. Questions are being answered. Problems are being solved. Transactions are being processed. Clients are being served.

Many existing processes are “in motion,” meaning they were created at some point, and have been amended over the years, but they have not been reviewed and updated from an overall perspective since they were launched. They get the job done but we may not know how well.

If we step back from a process, the big picture may have changed. Clients have different needs and expectations today than they did previously and expect different service levels. And the approaches and tools available to complete a process have changed. We may also have lost the focus on the ultimate goals of the process, getting caught up in the detail.

Benefits of Process Streamlining

Process streamlining provides a structured approach for revisiting, reviewing, and improving the internal effectiveness and efficiency of a process for the process owner while also evaluating and improving its value to the client.

Additionally, given the unique approaches used in a process streamlining project, there are additional goals and benefits. PS team members can apply many of the
principles and techniques learned during a PS project to regular work situations. Some of these principles and techniques include:

- **Change management concepts.** Change is a planned outcome of process streamlining. But devising and gaining acceptance for changed processes can be difficult. The PS methodology recognizes this, and incorporates approaches that team members can reuse for effecting, accepting, and integrating change. Given that change is increasingly part of everyday work life with each day bringing new challenges, these approaches are valuable to team members long after a PS project is done.

- **Focus on service and the client.** Often those responsible for a process become so focused on performing the individual tasks involved, they lose sight of the end result of serving a client. The PS methodology challenges team members to look at processes from "the opposite side of the counter." Many team members take this perspective back to their regular jobs, thinking differently about those to whom they provide service and their overall goals.

- **Focus on the process.** The process streamlining approach focuses on improving an overall process by examining and fixing the individual steps constituting it. The client is expecting the delivery a particular outcome, regardless of organizational structures and responsible individuals. These elements should actually be transparent. The PS methodology stresses an overall process, end-result focused viewpoint. This perspective is valuable when taken back to the office and applied to every day issues.

**High Level Overview of Process Streamlining**

Process Streamlining is a structured methodology to plan for, design, and implement the incremental improvement of a chosen process.

Work starts when a Project Sponsor, working with the Program Administrator, identifies a process that has potential for great improvement. Together, the Program Administrator and Project Sponsor craft the:

- **Case for Action,** outlining the compelling reasons for pursuing the PS, what the benefits will be, and what will happen if the PS is not done.

- **End Results,** a vision of what the process should ideally "look like" and/or enable (especially from a client's perspective) when it has been streamlined.

A carefully chosen team is then trained in PS methodology and charged by the Project Sponsor to improve the chosen process to meet the End Results. The
A seconded team spends two solid weeks (full time) in a private team room following a strict methodology to achieve the End Results.

A major difference between Process Streamlining and other approaches is that the team is not told "how" to achieve the End Results. Rather, the End Results paint a picture of what the streamlined process should "look and feel like," and what the process should achieve. The team’s responsibility is to improve the steps comprising the process to meet the End Results.

The Project Sponsor agrees to accept the team’s streamlining recommendations as long as they meet the End Results. The Project Sponsor then charges a separate implementation team with enacting the streamlining recommendations made by the PS team.

**Overall PS Timeline**

Prior to PS launch
- Develop Case for Action, End Results and Constraints, and Start and End of Process Parameters
- Pre-Map Process

Week 1
- Train Team Leader, Process Owner, Scribe and Team Members (Day 1 AM)
- Review and Verify Mapping of Current Process and Plan for External Research (Day 1 PM / Day 2 AM)
- Identify Attributes of Each Step of Process (Day 2 PM / Day 3 AM & PM)
- Brainstorm and Do External Research (Day 4 AM & PM)

Week 2
- Brainstorm and Do External Research (Day 5 AM & PM / Day 6 AM & PM)
- Design New Process (Day 7 AM & PM)
- Finalize Design and Plan Report (Day 8 AM & PM)

Week 3
- Write Report

Post PS
- Present Report to Sponsor(s)
- Plan Implementation and Execute

JM Associates is an advising and consulting firm to higher education and not-for-profit organizations. Areas of expertise include strategic and tactical planning, Process Innovation, and the strategic use of technology, helping organizations transform the way they achieve their mission and goals. Contact us to learn more!