

# ***Holistic Process Design***

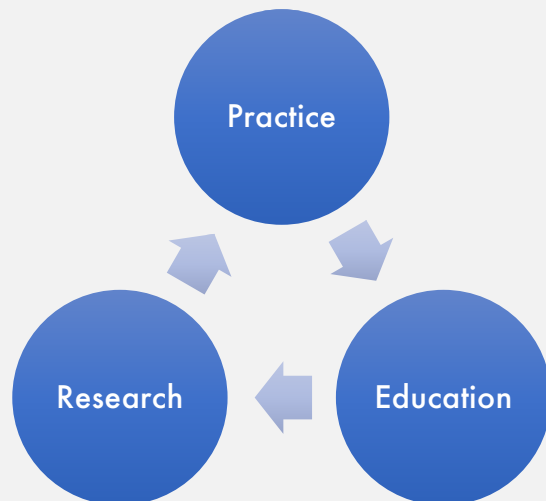
***A system of process, people, tools, and data***

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## Learning outcomes:

- Understand the problems when process is designed within silos
- Understand how people, process, tools, and data contribute to holistic design
- Ability to describe a university process as an end-to-end set of activities
- Develop a set of tools for constructing end-to-end processes

# Do these **symptoms** look familiar?

*I am unclear on responsibility, authority, and escalation paths*

*So much wasted time and rework*

*There is miscommunication and frustration between groups*

*Handoffs between groups are not working well*

*We have a lack of standardization*

*Users complain that we don't have documentation, but we've made tons of it*

*The new IT system is just a prettier versions of the same functionality*

*We have to do it that way because of policy.*

*Oh, that's just how we've always done it.*

*We found our workflow was missing critical steps and key stakeholders*

# Process innovation exists to avoid those issues and facilitate **successful** IT system **implementation**

**1**

Allows IT to innovate, not just digitize

**2**

Stops past mistakes from being repeated

**3**

Improves collaboration and communication between groups

**4**

Promotes customer-centric service design

**5**

Creates continuous improvement

IT systems fail to meet their **potential** due to poor business process **design**.

*Technology is not the solution to your business processes, it is the manifestation of your processes.*

# What is a **business process**?

*Create knowledge (grants acquisition and management)*

*Acquiring new capabilities (hiring)*

*Acquire goods and services (procurement)*

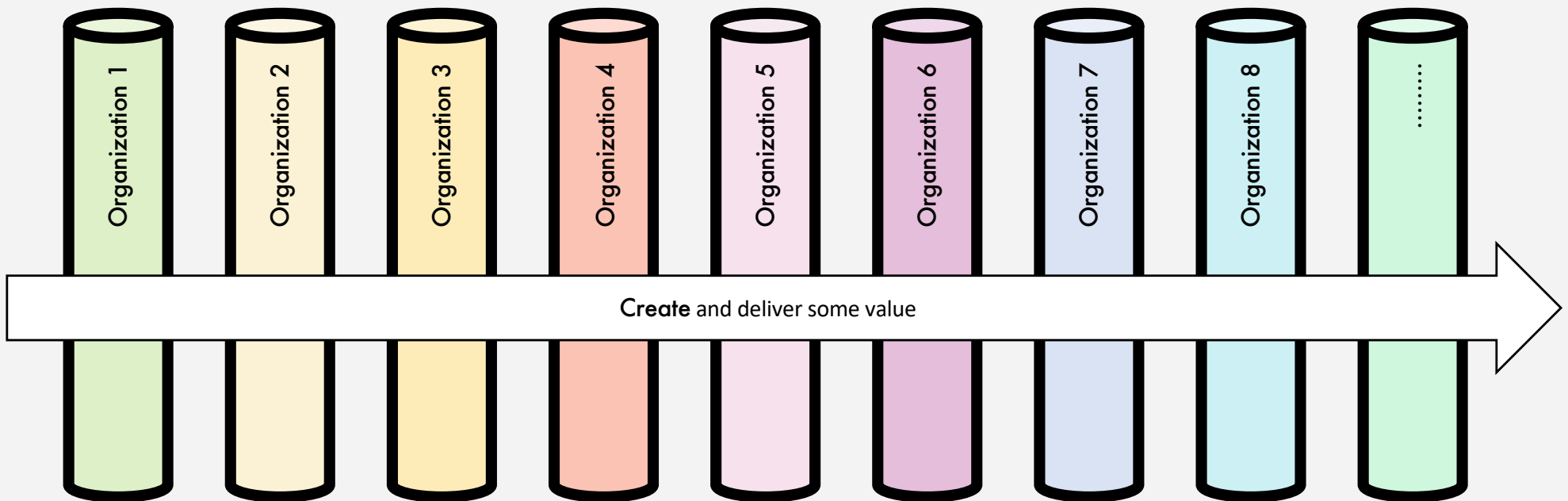
## *How value is created and delivered*

*Obtain a new student (admissions)*

*Educate a student (teaching and assessment process)*

*Facilitate communications (WiFi deployment)*

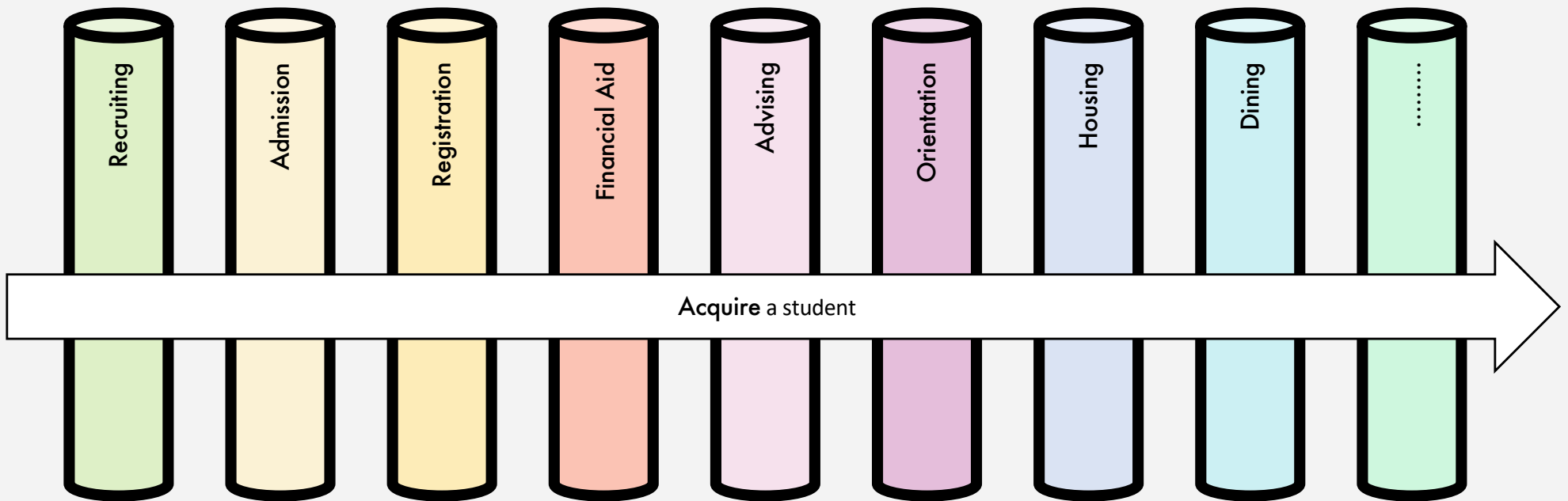
Processes exist along **two dimensions**:



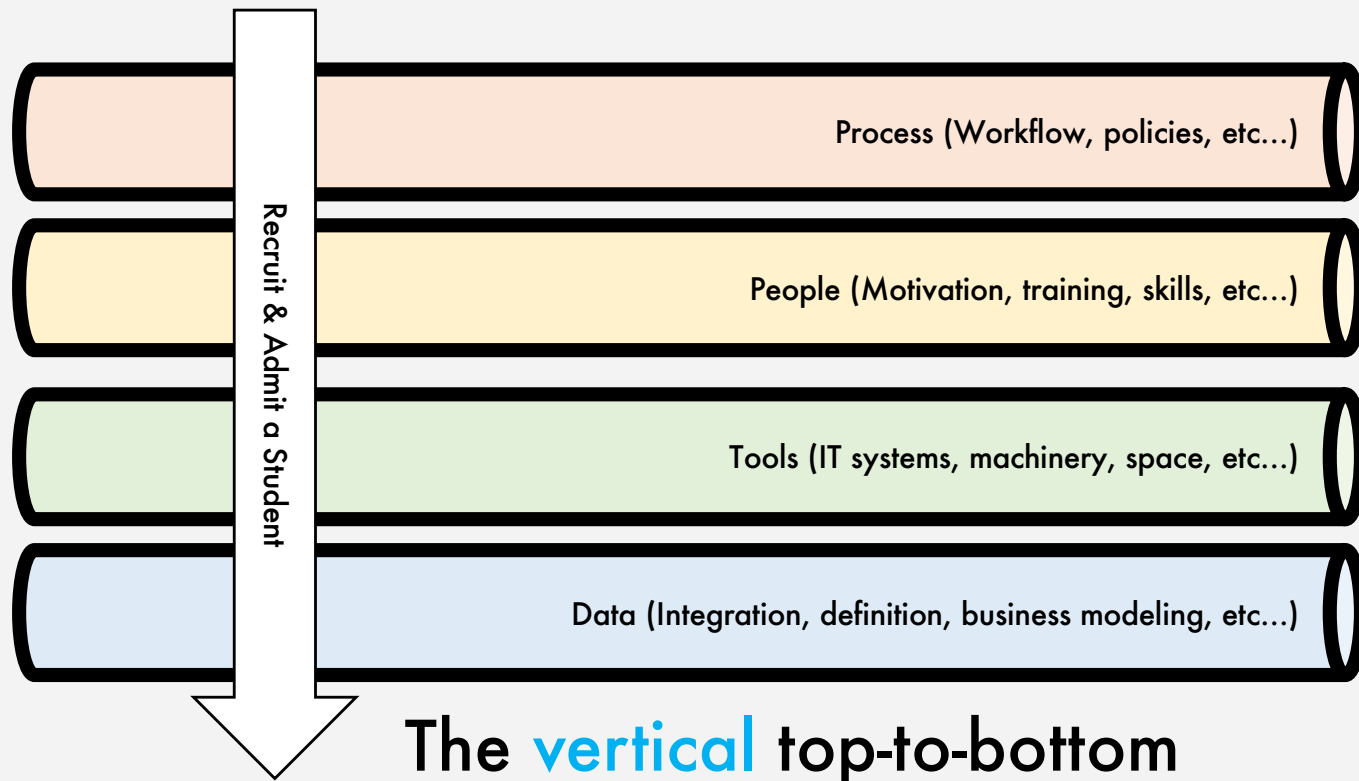
The **horizontal** end-to-end



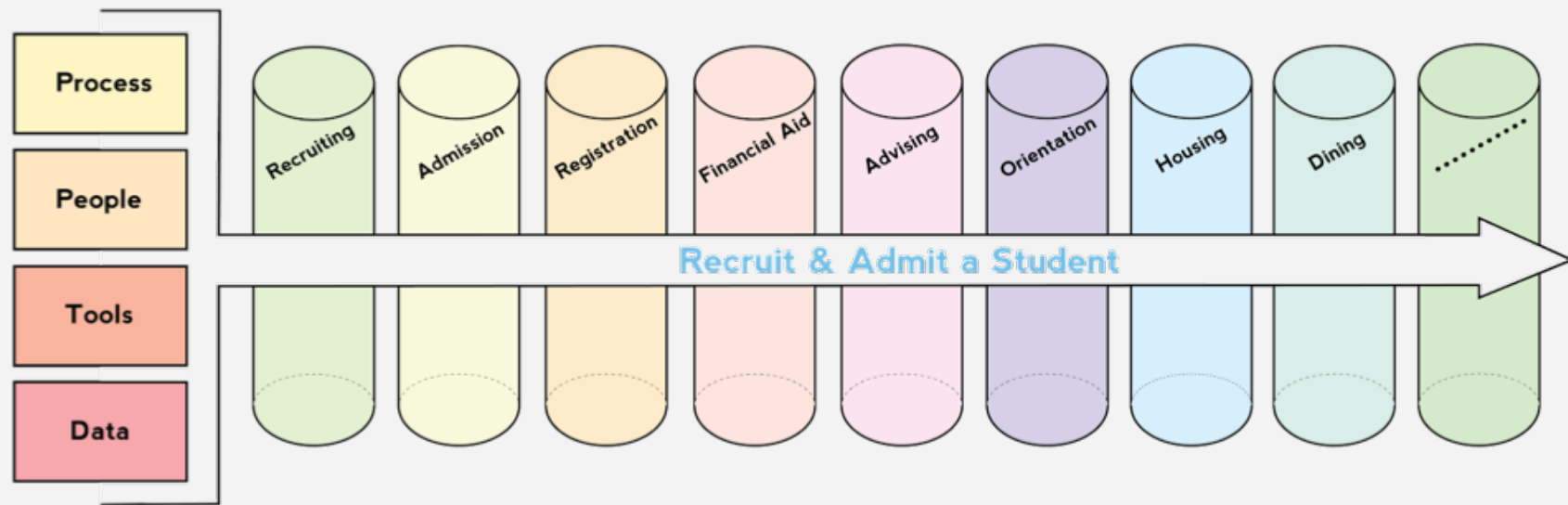
For example...



## And the second dimension

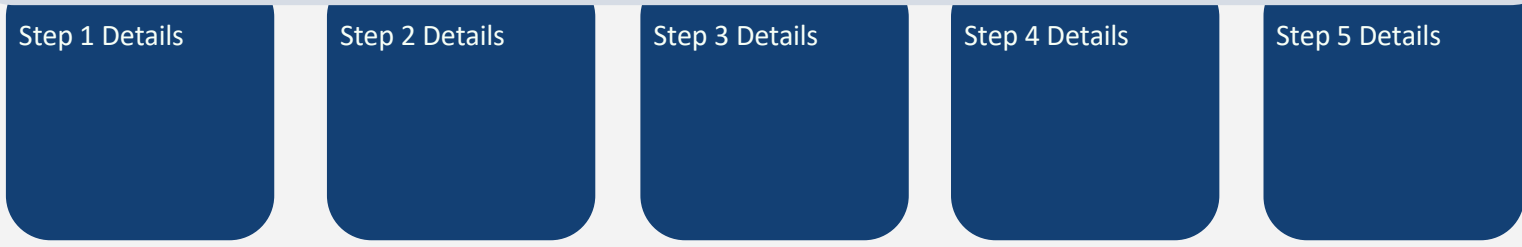
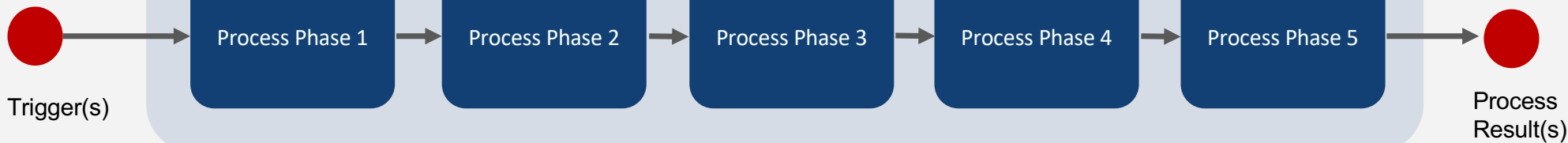


# This is the **holistic** view of process



- Participating Organization
- Participating Organization
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Title of Process



Tools		Data	
System X	Email	User Profile	Profile
Database Y	Excel Spreadsheets	Organization	Logistics
ABC Tool	PDF	Role	Itinerary
XYZ System	Xyz Website	Unit	Application
Dept. File Share P		Etc.	



# Business process are **difficult** to design



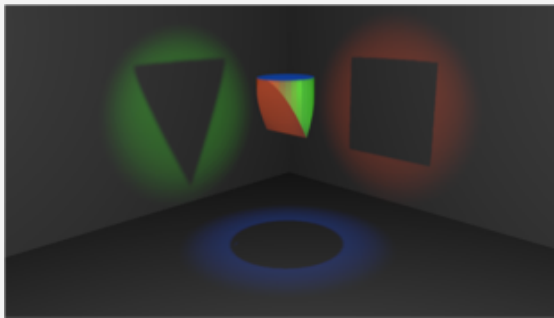
Know all stakeholders



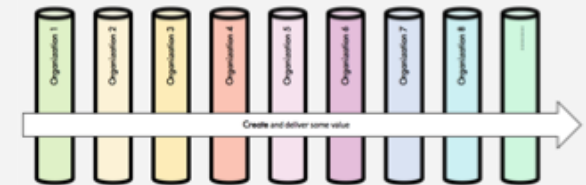
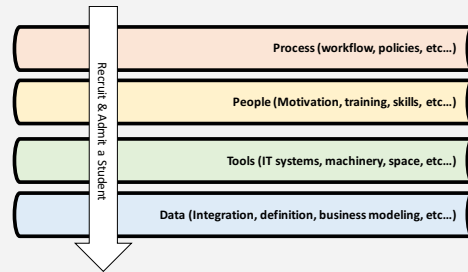
Balance diverse stakeholders



Operate in an ever-changing environment

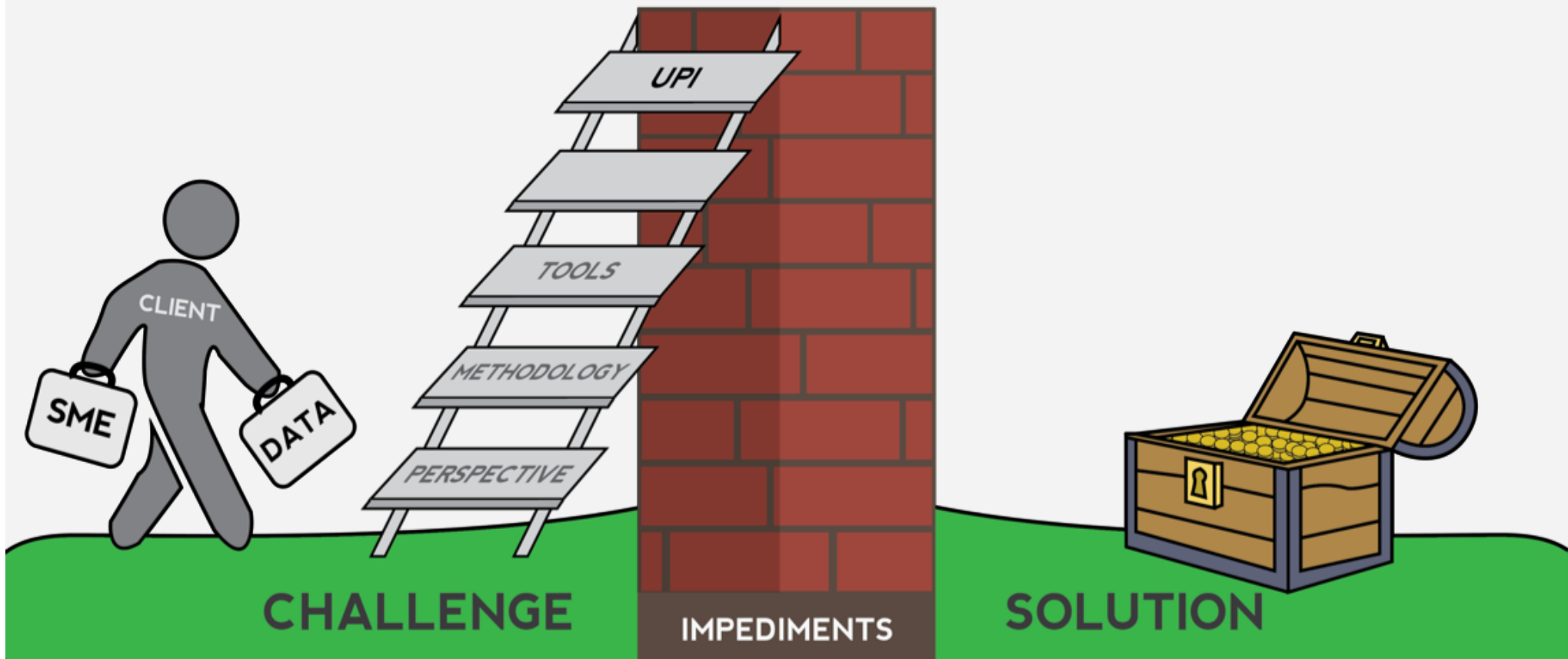


See beyond your own perspective



Integrate process, people, tools, and data across a value chain

# Our **value** proposition leverages existing strengths



Our perspective



**Holistic, End-to-End,  
Outside Perspective**

# Using a well-defined methodology

Define Process

Validate Process  
Scope Project  
Research Background Information

Discover Process

Gather Data  
Develop Process Summary  
Initial Analysis and Themes

Assess Process

Synthesize & Analyze Data  
Develop Assessment Models

Validate Process

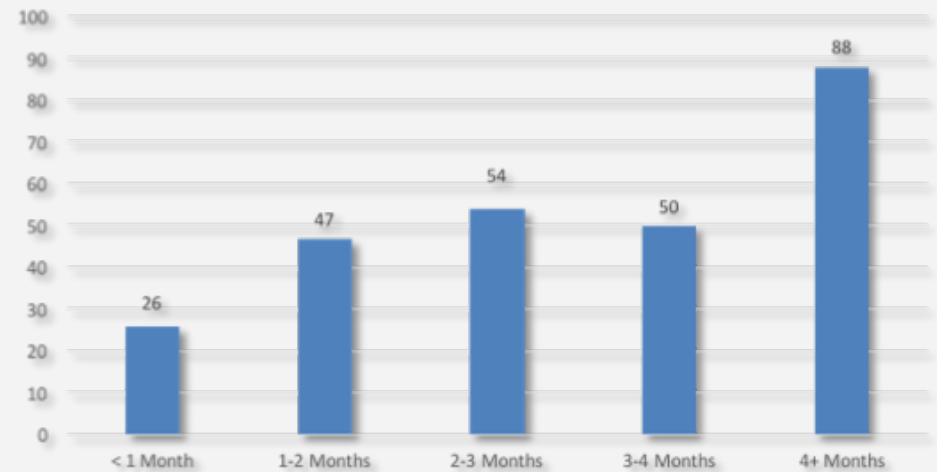
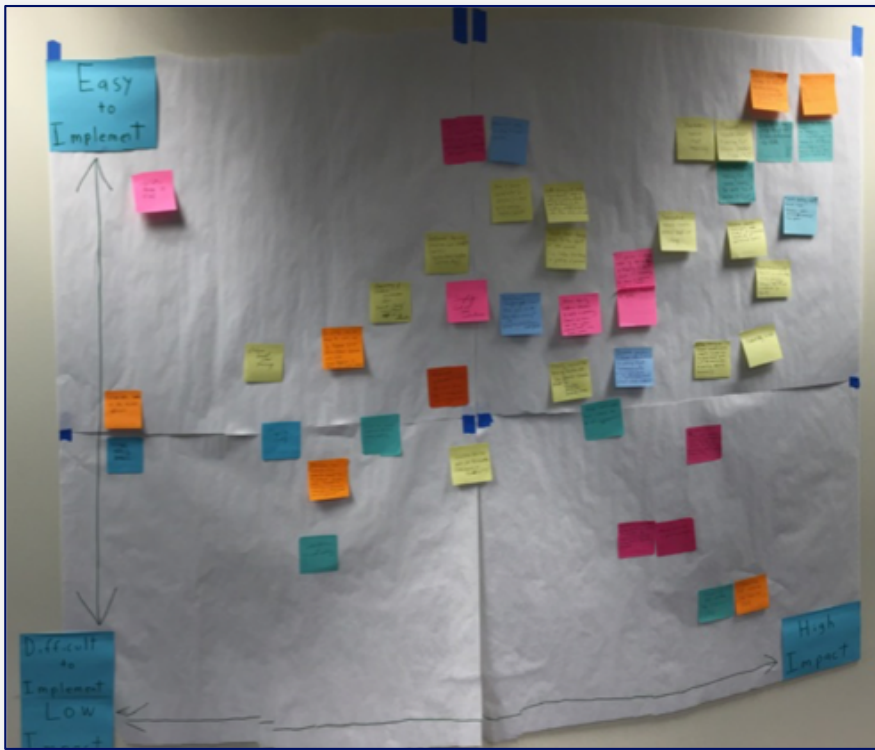
Finalize Process Models  
Develop Solutions

Deliver & Close-Out Project

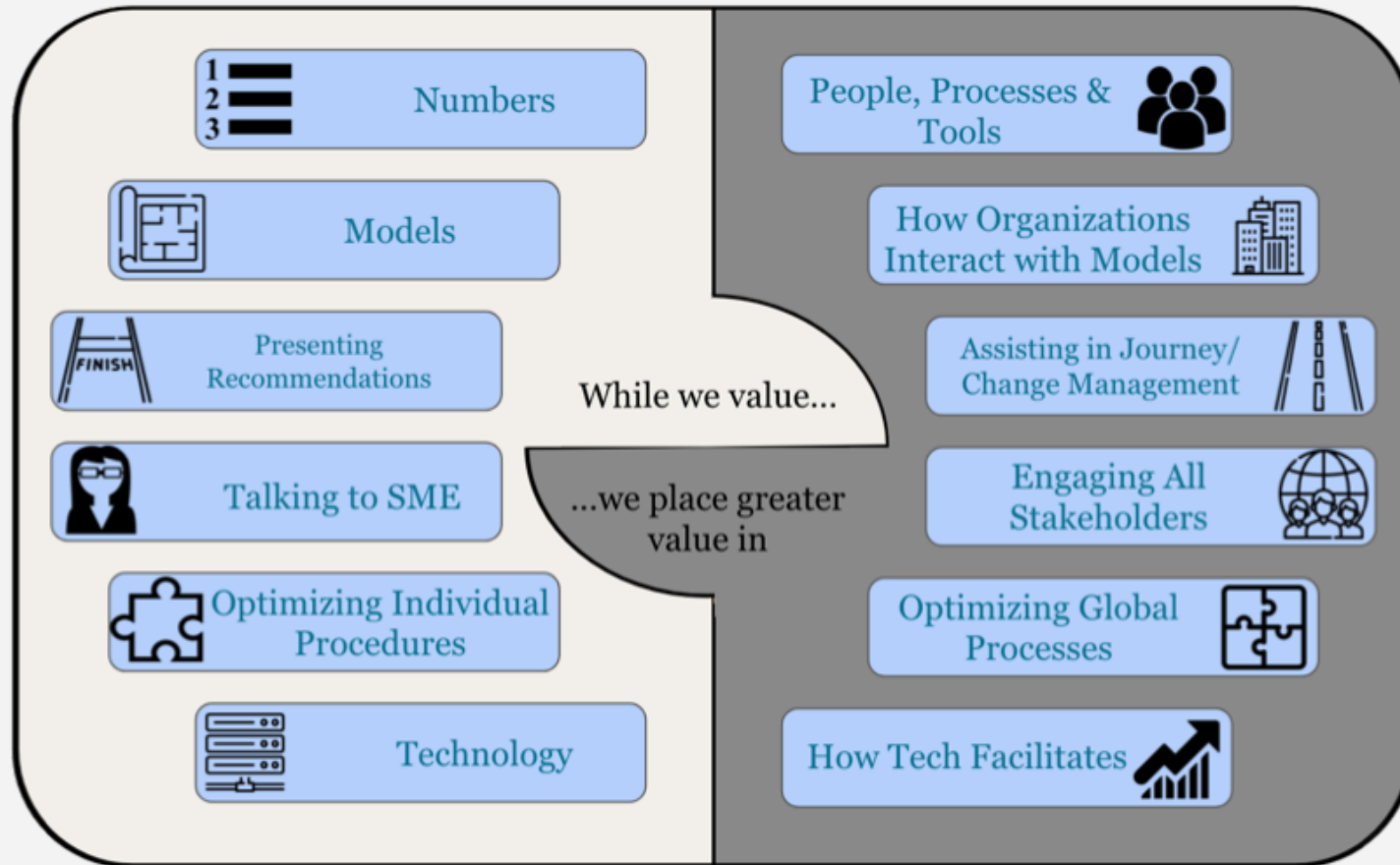
Conduct Briefing  
Prioritize Next Steps  
Project Close-Out



# And a growing library of tools



# And our philosophy



# This makes change happen!



# This makes change happen!

Implementing & sustaining for change

8. Make it stick

7. Build on the change

*Leverages multiple enablers*

Engaging & enabling the organisation

6. Create quick wins

5. Empower action

*Gets more people involved*

*Improved inter-organizational communication*

4. Communicate the vision

Creating the climate for change

3. Create a vision for change

*Common perspective and empathy*

2. Form a powerful coalition

*Sense of collaboration*

1. Create urgency

*Creates a higher level of engagement (lowers 'resistance')*

*Better ideas*

*Bottom-up urgency*

*Brings out the elephant in the room*

# Have had impressive **results**



- 24 Large projects
- 233 Staff directly involved
- 84% of Clients return
- 80% of Clients implemented change
- \$100,000s in identified savings

- 7 Published papers
- White papers, best practices, and guides

- 11 Conference talks
- 154 Employees trained
- 186 Students taught

***A whole lot of good will***

## We have **learned** a lot (since 2016)

1. Don't be scared of the elephant in the room
2. It is the journey, not the destination
3. You can never talk to enough people
4. There are bad clients
5. Leverage your position at a university
6. Build and define a concept model
7. This practice takes time to develop

# To learn more

**UPI Website:** <http://it.umd.edu/processinnovation>

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