

# Different day, same old s\*\*t

Greentree's Cameron Hallmark says day-to-day business needn't be a battle.

Okay, so your business is stressing you out. Things keep going wrong; simple tasks keep piling up, and jobs that should have been done days ago are still pending. Your customers are noticing, and they're not happy. You're spending too much time keeping tabs on staff about a multitude of little things. It's enough to drive you mad.

The fact is: your business processes are a mess. Time to shout for help?

## THE HUMAN FACTOR

Perhaps the first fact you should accept as you begin your journey towards better business processes, is that your staff are bound to make mistakes, and it's more likely they'll occur when performing those small but necessary tasks (the ones you're spending too much time monitoring).

"People screw up all the time, and then they waste a lot of time trying to fix the screw-ups," says Cameron Hallmark, Greentree's Chief Product Officer and resident business psychologist. He cites the case of one company that services computer hardware – where customers expect prompt attention. Logging service calls, then tracking them to ensure the work was done and the customer billed correctly for the time involved, was driving the manager crazy.

"He told me he was always on his service people's backs to see what they were doing because he didn't have any visibility of what was going on," Cameron recalls. "He was always over-managing them."

Another company, which services air-conditioning systems in large buildings, had a special problem. Because air-con systems can spread germs, they require regular testing to comply with government health regulations. The manager was constantly worrying whether his service teams had kept count of how many visits or service checks they'd made, or failure to re-visit if a lab test had gone wrong. If staff in a building became ill and the finger was pointed at the air-con, a health department audit would be on the cards, and the consequences for the service company if errors were discovered could be disastrous.

"There were so many things that could go wrong in his process," Cameron says. "It was actually complex, and he relied on a guy with a spreadsheet to get that right. What's more, it was a problem that he didn't believe could be fixed."

## ENTER BPM

Business process management (BPM) is all about removing that prime source of stress: managing those many small, repetitive, but important tasks where errors can easily occur. The best BPM software has been designed recognising that human beings are forgetful, inconsistent, and relatively poor communicators.

Greentree BPM consists of four technology layers: Workflow Desktop, Approvals & Alerts, Escalation Engine, and Process Flow Designer.

Workflow allows each user to have a customised view of what's going on; they see what they need to know. This resolves the problem of visibility, because the Active Desktop function in Workflow updates automatically across all users. So if, for example, an order is placed by an order entry clerk, the people further along the order chain (logistics, purchasing, warehousing, accounting, etc) all get notified to perform their particular task. As each task is completed, everyone's view is updated.

"When Workflow came out, it meant a lot of our customers didn't need to run reports anymore," Cameron says. "It's all live, and proactive. Workflow breaks down the walls because it's communicating things across the whole system to all the different people who need to know about it. We have clarity and transparency."

Approvals & Alerts allows users to define the rules and conditions that should apply to specific business processes; it remembers those little things people tend to forget, issuing reminders, and Escalation Engine notes when things haven't been done, or have been done incorrectly. Action is required to continue the process, and if something is overlooked, the person responsible is told. Process Flow Designer allows the user to lock down simple and complex processes into documents that become a template, ensuring that tasks are done the correct way every time.

"One of our customers using Approvals & Alerts started out with just one rule in the system," says Cameron. "When I went back to see him a year later, he had 50 rules – some he'd put in place himself, others he'd done at the request of various other staff."

"He now had this whole different thought process about stopping the screw-ups, stopping people doing what they shouldn't do, and he's gradually tightened the system down in a way that they can't screw up, but they can still do what they have to do. And they like it too, because it means they're not getting in trouble; they're not doing the wrong thing."

## LEARNING AND GROWING

As with any change that affects business processes, adoption and adjustment take time. But as Cameron has pointed out, that learning curve can teach you things you didn't know about your business, and the way it works.

"You're not reinventing the wheel; you're discussing and documenting the wheel," he says. "Often when you do that, you find that people are doing things they shouldn't need to do, or they're doing it in an inefficient manner. So just by sitting down and talking about it, even before you put it in the

system, the manual process is being improved.”

Before you even talk to a software vendor about BPM, you need to have a clear idea about what your problem is. You may not need a full BPM system – Approvals & Alerts alone may be the answer. Greentree’s built-in flexibility means you can enable whichever modules you require, but your first step should be to draw up a flow chart of your current business processes, so you can identify the areas where improvement is needed.

Once you’ve got your processes documented, be sure to share them with other key people in your business. Everyone has their own personal ‘pain points’, and they’re bound to mention things you’ve overlooked. Everyone in the chain needs to be involved, and feel involved, in order to make implementation and training as easy as possible. See the box on this page for a checklist of what you need to do when considering purchasing BPM software.

#### POSITIVE OUTCOMES

For Cameron Hallmark, customer feedback is testimony to the effectiveness of good BPM. The manager of the computer servicing company has Approvals & Alerts configured to send him an SMS message if a job is within four hours of exceeding the deadline for completion.

“He loves it,” Cameron reports. “They do 150-200 calls a week and he now gets about two SMS messages a week. He told me, ‘I don’t go to all the guys anymore and ask them what they’re working on, what their problems are. And my people like me more because I’m not on their back all the time.’”

Another customer says that with BPM he not only knows that a task is being done; he knows how long it’s taking. “He told me, ‘BPM has become my competitive advantage because I can guarantee we will do it in a certain way and in a certain time’,” Cameron says.

As for the air-con guy: BPM makes sure that the lab submits its test results to the right people, and if there’s something amiss, it ensures a follow-up test is done, and the alert process is escalated if action isn’t taken.

“Not only did we make it better,” says Cameron, “we made it safe.”

#### POINTS TO PONDER BEFORE SEEKING BPM SOFTWARE

- Does it cover all your operational and financial areas?- Can it handle simple and complex processes?- Does it offer specific alerts, live desktop, email and text notifications?- Will it alert you about things that haven’t been done?- Can it automatically escalate incomplete tasks?- Does it keep an audit of who did what and when?- Is it flexible enough to start simple and build up as your needs change?

Read about Cameron Hallmark

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