How work gets done

Malcolm Cawood shares lessons from the field of Business Process Management and opportunities for technical communicators.

Introduction

Everyone who works (whether as an employee or a contractor or a manager) requires access to information in order to help and enable them to do their job (how often have you started a new job and not had any idea what to do or worse, where to find out what to do?). And if you need access to information, it follows that someone must produce and make available that information.

In this article, I want to take the key principles of Business Process Management (BPM) and show how understanding these principles can help any worker, not just managers.

More specifically, I want to tease out how this field is not just the preserve of business analysts (and associated disciplines). Rather, I suggest that many professional communicators will have developed a skill set that is particularly relevant for designing and producing materials that make up the components of a BPM system.

Business Process Management

A business process is, in essence, *how work gets done*.[i] It is not just about workflow or software automation, as is often thought. True, a production line is a business process, but so, too is a recruitment process or designing and writing a software manual.

BPM is a philosophy that aims to orchestrate and *describe the work performed by all resources involved in creating outcomes of value for its customers and other stakeholders*.[ii]

So, if we are to 'describe the work performed by all resources', we need to cover everything required to execute or perform a process. This includes: policies, operating rules, controls, information, IT systems, data, technologies, measures... (and others). Anyone involved in the process of producing documentation (a manager, an employee, maybe a contractor) is thus constrained by, or guided, or enabled by these resources: in a work context, you live and breathe them, regardless of whether they are explicitly documented or not.

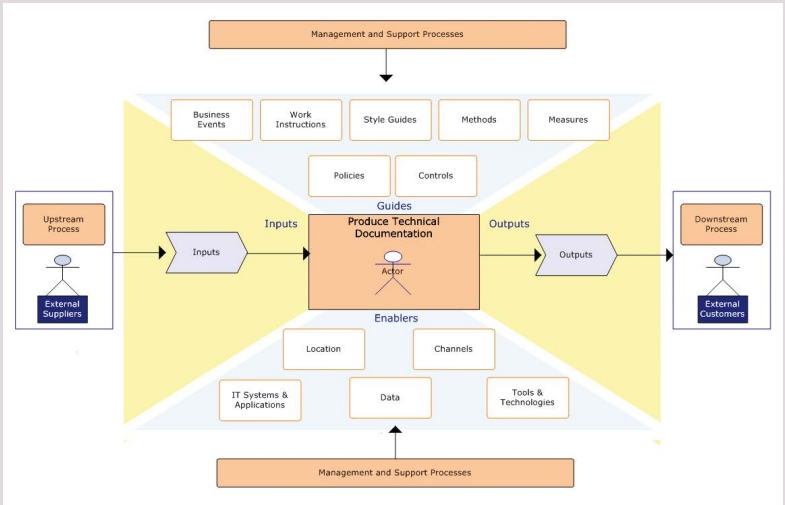

Figure 1. Inputs Guides Outputs and Enablers (IGOE) or Scope diagram

Process diagrams

Many people think of process diagrams as 'process maps' or flowcharts. There are numerous notational styles (the de facto standard now is Business Process Model and Notation (BPMN)); essentially they are used to show the flow of a process from the triggering event to the final result. Such diagramming techniques are useful for showing handovers, redundancy, and bottlenecks.

Useful as these are, however, I want to focus on a different type of diagram known as an Inputs, Guides, Outputs and Enablers (IGOE) or 'Scope' diagram (see Figure 1)[iii]. It provides a richer picture of all the 'things' that are relevant to getting work done, in this example, what makes up 'Produce Technical Documentation'. This includes:

- Inputs: for example, software specifications, interview/workshop notes, user training needs
- Guides: for example, work instructions, policies, style guides, measures
- Outputs: for example, a Help system, a trained user
- Enablers: for example, the team members (actors) who do the job. This is data that is:
  - Required but not transformed (for example, server connection strings, code samples)
  - Applications (authoring tools, source control software), and
  - Technologies (for example, single-source database, analytics).

i The phrase comes from Improving Performance: How to Manage the White Space on the Organization Chart, Rummler, G, and Brache, A, Third Edition (2013), p61. In the field of BPM, it has become a concise definition of the essence of a business process

ii Burlton, R: "Business Process Manifesto!" (2012). Available on the BP Trends web site, which is an excellent resource for all things process: www.bptrends.com/manifesto/BPManifesto_EN_A4.pdf

iii IGOE stands for Inputs, Guides, Outputs, Enablers. A useful introduction to this technique is Kathy Long's "SIPOC for Service: Is it Enough?" See www.brcommunity.com/b553.php

- Suppliers: organisations/actors who supply inputs (for example, developers, IT support) or upstream processes
- Customers: organisations/actors who receive outputs (for example, the customer, an external regulator) or downstream processes.

IGOE as a management tool

Using Figure 1, a manager can begin to formulate questions and a plan of actions:

- What are the boundaries of the process, that is, just what can I control?
- What do I need but have no control over (for example, source control software)?
- Who do I need to liaise with (for example, upstream/downstream process interfaces and handovers)?
- What inputs do we need before we can even begin; and what outputs are expected?

As a management tool, you can overlay Figure 1 with issues or hotspots[iv]. Here are some typical patterns:

- Inputs do not arrive on time or are in the wrong format
- Technology is out-of-date or not fit-for-purpose
- Team members (actors) are in a different time-zone or have the wrong skill sets
- Measures are meaningless and controls no more than box-ticking
- No style guide.

The list is potentially endless and you will have your own pet hates. The point is to use the IGOE diagram as an analysis and information tool; for example, you might want to:

- Make a case moving to new technologies
- Define 'service level agreements' that define minimum standards for your inputs
- Commission a style guide and\or some work instructions

Electronic performance support system and human performance technology

At a basic level, the IGOE framework is a kind of 'super checklist', which covers all the elements of 'how work gets done'. It is also useful for all participants and stakeholders, not just managers.

If we publish this diagram as an online knowledge base, we can start, perhaps, to realise the promise of the electronic performance support system (EPSS), a concept first mooted in 1993 where technology becomes an explicit means of facilitating knowledge-based performance[v].

User Scenarios

A contractor or new starter might:

- Need access to work instructions and a style guide
- Want to find out what source control software is used, and how
- Find out how to log-on to the Time Recording database

An established employee might ask:

- What are the latest results from our analytics platform?
- Who do I contact (for example, a manager of a downstream process) to escalate an issue that has emerged from customer feedback?
- Just what exactly do our policies say about the customer?

Enabling users

There is an interesting parallel with another field of management here: Human Performance Technology (HPT). Figure 2 shows the main idea[vi]. Essentially, an employee cannot perform unless they are adequately supported; and the key means of doing this is to provide relevant information at the right time. In Figure 2, think about each of the questions in the various white boxes. How will they be answered? What systems need to be in place? What knowledge artefacts are required? Who produces and maintains all these supporting elements of how work gets done?

By providing *all* team members with access to necessary information, you are ultimately enabling and empowering workers and providing a concrete framework for performance management.

Opportunities for technical communicators

For those who might want to break out of documenting IT systems, the field of business information and communications, in its widest sense, offers many opportunities (and can perhaps be best summarised by an emerging field known as 'information science')[vii].

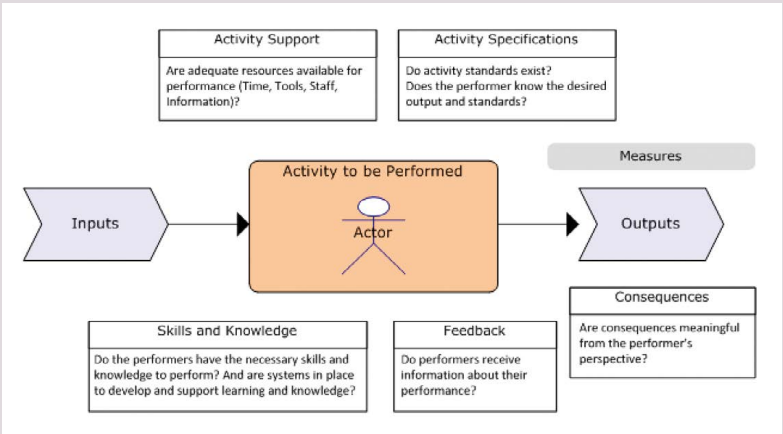

Figure 2. Human Performance Technology

iv Harmon, P: "Scoping Processes". (http://www.bptrends.com/publicationfiles/advisor20121009.pdf). This article describes the use of IGOE diagrams for analysing "process problems"

v See: http://en.wikipedia.org/wiki/Electronic_performance_support_systems and www.epsscentral.net

vi There are several articles about HPT on the BP Trends web site, for example: www.bptrends.com/publicationfiles/spotlight_0721091.pdf

vii See http://en.wikipedia.org/wiki/Information_science

Think of the IGOE diagram again: it is a tool used in BPM and business analysis. However, constructing one requires skills in taxonomy and information categorisation, namely the accurate and meaningful 'naming of things' that you discover in the organisation.

Publishing this type of diagram, with links to other artefacts, is a kind of portal in its own right. Here we get into the field of information architecture, content management, and 'curating' information.[viii]

There are several strands of opportunity for authors here. Maybe you might want to:

- Write more client-specific software documentation (think of the IT systems box in the Enablers section of the diagram)
- Write the business documentation such as work instructions, business rules, or policies
- Move into business analysis completely

Within this wider informational context, we can start to think 'beyond the document' and more about what knowledge is in a business context, about how it is used in the real world. By thinking in terms of BPM and the role of knowledge in supporting performance, the focus shifts from 'authoring' to 'communication'. C

Further reading

I recommend subscribing to the BP Trends monthly newsletter, which includes around 7-8 articles every month. In addition to the referenced publications, here is a select set of introductory articles on a variety of BPM areas (go www.bptrends.com and search for the following):

What is BPM?

Harmon, P: "What Do Business Process Managers Manage?" 2008

Harmon, P: "What is a Business Process", 2011

Business Analysis

Harmon, P: "BPM and Business Analysts", 2010

Long, K: "IGOE — Guides: From Policy to Business Rules", 2012

Process Documentation

Boots, J and Harmon, P: "From Process Analysis to Employee Job Aids", 2009

Gotts, I: "Putting the M back in BPM", 2012

Process mapping and notation

Sharp, A: "Boxes, Lines, Widgets, and Words: Managing Detail and Perspective in Models", 2009

Silingas, D: "Business Process Modeling with BPMN From Anti Patterns to Best Practices", 2013

White, S: "Process Modeling Notations and Workflow Patterns", 2004

Human Performance Technology

Harmon, P: "Human Capital Management and BPM", 2013)

All articles last accessed on 5 August 2013.

Malcolm Cawood, MISTC has been a consultant for Casewise Systems, a vendor of Business Process Modelling and Enterprise Architecture software for over 10 years. Before that, he was a technical author working primarily with repository-based modelling tools.
E: malcolm@cawood-online.co.uk
W: www.cawood-online.co.uk

viii See "Your Documentation Belongs in a Museum!", www.infomanagementcenter.com/enewsletter/2012/201209/third.htm

All web sites last accessed on 27 June 2013.

Terminology

Business Information and communications: Covers all aspects of business documentation: Policies, processes, business rules, controls, IT systems, as well as work instructions and user manuals.

BPM: Business Process Management. This is a wider concept than just business process mapping or modelling.

BPMN: Business Process Model and Notation. BPMN is a graphical representation for specifying business processes in a business process model.

Business processing mapping: A diagramming technique that shows the sequence of activities that makes up a business process. It typically starts with a triggering event (such as an 'Order received from a customer' or a 'Project Kick off') and ends with a result that indicates that the purpose of the process has been completed (such as 'Order Delivered' or 'Project Completed').

EPSS: Electronic Performance Support System

Flowcharts: A graphical representation of a sequence, or flow, of activities. They often include diamond shapes to represent questions and branching as in 'Does X occur? If yes, do Y; if no, do Z'.

HPT: Human Performance Technology.

IGOE: Inputs, Guides, Outputs and Enablers. In some ways, this is an extended view of a SIPOC diagram.

Information science: A term used to capture the inter-disciplinary aspect of working with information. Going beyond writing, it includes collecting, analyzing, categorizing, storing, manipulating, and disseminating information with overlaps with cognitive psychology.

SIPOC: Suppliers, Inputs, Process, Outputs, Customers.