



Human Processes

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Celtic Collaboration

Although for most of my life I've composed music, the only instrument I played seriously was piano. Then a few years ago I thought it was time to learn some ensemble instruments and find out what it was like to be on the receiving end. So I took up:

- Classical guitar - a success.
- Trumpet - nearly cause for divorce. If you haven't taken up trumpet by the time you leave school, forget it.
- Chromatic harmonica - fun but challenging. How does Toots Thielemans do it?
- A variety of squeezeboxes – and there is a huge variety to choose from.

Of the squeezeboxes, the one I've stuck with is the English concertina – a small, intricate, bizarre device that to my knowledge is the only musical instrument ever invented uniquely in England. After a while I became proficient enough on this little box that I was able to join in traditional music sessions, which take place fairly regularly in pubs around my area. I've always wanted to do this – not just for what the Irish call the “craic”, but because to a collaboration specialist, the dynamic is fascinating.

Traditional music sessions work quite differently to the jazz jam sessions with which I was familiar. When a group of jazz musicians get together to play, they talk before they start each tune, even if only for a few seconds – to choose a song, agree on a key if it's not obvious, and perhaps decide who will play which part of the theme – although the performance itself may go in quite unexpected directions. Further, there is usually a jam session leader, even if this is implicit rather than explicit. The leader decides who will be on stage and for how long, and influences the general musical approach.

By contrast, at a traditional music session, there is no discussion before each tune at all and no obvious musical leader.

Rather, someone just starts playing or singing. Other people sitting round will then join in if they know the tune (or can pick it up), if they feel like it (as opposed to having a break or a beer), and if it wouldn't get in the way (sometimes, for example, there are too many instruments, or instruments of the same type, already playing). The person who started may go from one tune into a series of others without pausing, and the other tunes may not be in the same key or time signature. Since most tunes are short, repeated only an average of three times, and many tunes are played very fast, each series of tunes may be over soon after starting. Then another person will start playing or singing, and the cycle goes round again.

Particularly fascinating to me coming from a jazz and classical background was how people may play a series of tunes without ever thinking of their titles – or even knowing their titles. If you ask someone what tune they just played, often they won't know. Traditional tune titles are not much

help anyway, since many tunes have more than one title, and a title may correspond to several different versions of a tune.

From a collaboration perspective, the traditional music session is instinctual rather than mindful. The key question is this: what are the advantages and disadvantages of the lack of discussion and direction?

Collaboration in the now

Clearly the traditional music session works as an approach – or the format wouldn't have become traditional in the first place! Everyone has fun, and at the time, interactions are streamlined to perfection. For example, I've never seen two people start a tune or song at once. To the contrary, anyone who wants to will find the right moment, and if there is a gap, the group will encourage someone who hasn't contributed yet to play or sing something.

However, if you talk to people individually about a particular session, outside the session itself, you may hear a different story. For example, a person may have strong feelings about the current trend of the session - that the type of music played recently has too much or too little variety, that the playing has become too fast or too loud, or even that particular players have started to dominate the music or bring an inappropriate instrument. What can they do about this?

Not much. They may express their feelings to the group, or just grumble to particular cronies, but since there is no conscious direction by anybody, often such input has little effect. Eventually, someone who feels strongly is likely just to stop coming, or find a new session to take part in.

In other words, instinctual collaboration works in the now – a session itself is generally rewarding both for players and for others in the room. However, longer-term collaboration problems may be stored up without possibility of solution, due to:

1. Changes in the approach over time;
2. The complexity of interactions between people involved;
3. The different perspectives of people involved.

Collaboration in the long term

A parallel in working life might be a steering group or program board meeting where innovative ideas are presented and there is enthusiastic agreement on a way forward, but somehow the changes never get implemented. The stakeholders are not engaged in the right way, communications do not seem to achieve their purpose, the necessary understanding is not shared, sufficient time is not available, and plans do not seem to match reality.

In general, if your work is long-term, complex and with stakeholders in multiple organizations, you may well struggle to coordinate it, improve it and reuse lessons learned. This is because most people use traditional management techniques to implement such collaboration – i.e., project, case or process management. These techniques, and supporting software tools, assume that collaborative work can be described as tasks, documents or steps in a workflow.

For many people, this is not a helpful description of what they and their colleagues actually do. Managers responsible for programs, projects, initiatives, ventures, schemes, or other long-term, complex, cross-boundary work need to coordinate human interactions over a long period of time, take a high-level view that does not obscure important details, and allow for differences between stakeholders in perspective, motivation and authority.

Collaboration in virtual teams

A key to understanding long-term, complex, cross-boundary collaboration is the concept of a “virtual team” – i.e., people that work together but don’t sit together. You can’t describe the work of such teams as a set of tasks, documents or workflow steps. Rather, you need to create “Virtual Team Plans”, which help you:

- Build dynamic teams
- Communicate purposefully
- Create, maintain and share knowledge
- Manage time effectively
- Re-plan as you go along to adapt to circumstances

You can visualize Virtual Team Plans as work breakdown structures or GANTT charts, but they are based on **goals**. Each goal has its own Stage, in which people play Roles to provide Deliverables and/or contribute in other ways, such as by reviewing documents or commenting on progress. This means that Virtual Team Plans can be changed easily at any time, since their structure is simple yet powerful.

TEMPLATE Sales Bid		
Stage	Role	Activities
1 Generate Lead 20-Feb-2013 Entry of a new sa...	Nominated Sales Lead Unassigned	Qualify Lead 0 days 20-Feb-2013 The Nominated Sales Lead qualifies the lead. While doing so, the person who has created the lead may be asked to maintain their relationship with the Client on behalf of the Regional Solutions Team until the time is right for sales input. A standard evaluation spreadsheet can be used to help qua... Lead Qualification Spreadsheet - Temp... Lead Qualification Spreadsheet View Customer Background View Customer intelligence gathered
2 Qualify Lead 20-Feb-2013 The Nominated Sal...		
3 Create Opportunity 20-Feb-2013 The Nominated Sal...		
4 Develop Opportunity 20-Feb-2013 The Nominated Sal...	Lead Owner Unassigned	View Qualified Lead 20-Feb-2013 View Lead Qualification Spreadsheet
5 Negotiate Proposal 20-Feb-2013 The Nominated Sal...	Lead Creator Unassigned	View Qualified Lead 20-Feb-2013 View Lead Qualification Spreadsheet
6 Await Decision 20-Feb-2013 While waiting for...		
7 Close Opportunity 20-Feb-2013 On receipt of a s...	Solutions Team Unassigned	View Qualified Lead 20-Feb-2013 View Lead Qualification Spreadsheet
	Regional Sales Support Unassigned	Customer Intelligence 0 days 20-Feb-2013 Carry out due diligence as part of lead qualification - gather background information about the customer. View CRM screen for lead recording View Lead Qualification Spreadsheet Customer Background Customer intelligence gathered

Figure 1: Plan template for Complex Sales

Further, software tools for Virtual Team Planning provide each member with their own copy, keeping all copies synchronized by normal email, enabling members across multiple organizations to retain control of their business information, and removing any barrier to entry.

TEMPLATE Manage Youth Offender Case		
Stage	Role	Activities
1 Initiate Case 20-Feb-2013 Interact with CPS...	YOT Manager Unassigned	Allocate Case Manager 20-Feb-2013 After scanning the materials associated with the case, assign an appropriate Case Manager View Offence Summary View Police Report View Pre-Sentence Report Required View PSR Notes from CPS
2 Gather Information 20-Feb-2013 Gather informatio...		
3 Estimate Assets 20-Feb-2013 It is mandatory f...		
4 Estimate ROSH 20-Feb-2013 It is mandatory f...	YOT Case Manager Unassigned	Familiarize With Case 20-Feb-2013 Read the materials provided about the case, and see whether or not a PSR is required (and if so, why) View Offence Summary View Police Report View Pre-Sentence Report Required View PSR Notes from CPS
5 Handle Referral 20-Feb-2013 If YOT should con...		
6 Handle Non-Referral 20-Feb-2013 Mandatory for a N...	CPS Liaison Unassigned	Provide Offence Summary 0 days 20-Feb-2013 Provide a short summary of the offence Offence Summary Police Report
7 Investigate Abuse And Neglect 20-Feb-2013 When information ...		
8 Prepare Reports 20-Feb-2013 The views of chil...		Request Pre-Sentence Report 0 days 20-Feb-2013 If a PSR is required, indicate this and explain why Pre-Sentence Report Required PSR Notes from CPS
9 Write Up Judgements 20-Feb-2013 Write up the proc...		
10 Supervise YRO 20-Feb-2013 When the court ha...		
11 Supervise Referral Order 20-Feb-2013 Where a Referral ...		

Figure 2: Plan template for Youth Offender Case Management

Finally, Virtual Team Plans make it simple to capture lessons learned, since Plans can be re-used as templates to provide best practices in specific situations. Gartner calls this dynamic creation, re-use and improvement of best practices "design-by-doing".

TEMPLATE Telehealthcare Commissioning And Evaluation Toolkit		
Stage	Role	Activities
1 Identify Needs 20-Feb-2013 What are the tele...	Service Commissioner Unassigned	Clarify Stakeholder Groups 0 days 20-Feb-2013 Identify stakeholders and clarify the many stakeholder groups for telehealthcare Stakeholder List Identify Stakeholders Guidance Stakeholder Inventory Influencing Maps
2 Establish Buy-in 20-Feb-2013 Who are the stake...		Map Stakeholder Issues 0 days 20-Feb-2013 With telehealthcare Stakeholder Issues Establishing Buy-In Checklist
3 Consider technology 20-Feb-2013 What telehealthca...		Add Activity
4 Define Workforce Requirements 20-Feb-2013 How will teleheal...		Add Activity
5 Design Evaluation 20-Feb-2013 What evaluations ...	Risk Manager Unassigned	
6 Plan Implementation 20-Feb-2013 How will we imple...	Public Health Officer Unassigned	
7 Create Business Case 20-Feb-2013 What is the busin...	Clinical Lead Unassigned	Consult Clinical Stakeholders 20-Feb-2013 On plans to involve View Stakeholder Involvement Plans View Public Involvement Plans View Communications Plan
	Managerial Lead Unassigned	Analyse Stakeholders 0 days 20-Feb-2013 By needs, preferences and styles - including for involvement Stakeholder Analysis Document View Stakeholder List View Stakeholder Issues Stakeholder Needs And Expectations Stakeholder Needs And Preferences For... Stakeholder Analysis AIDA Analysis RACI Analysis Design Involvement Activities 0 days 20-Feb-2013 for telehealthcare Stakeholder Involvement Plans Public Involvement Plans Communications Plan Involvement And Communications Template Design Involvement Guidance Stakeholder Involvement In Business C... Involvement Plan Guidance Ladder Of Participation Stakeholder Involvement Reference Mat... Establishing Buy-In Reference Material

Figure 3: Plan template for Telehealthcare Commissioning and Evaluation

Conclusion

For many people, such as readers of this Column, their working life may bear little resemblance to a traditional music session! It might be more usefully compared to organizing a music festival. They aim to achieve specific goals by coordinating long-term, complex activities of people from multiple organizations.

This can't be done using project, case or process management techniques and tools, since it is unhelpful to describe such work as a set of tasks, documents or workflow steps. Rather, such work is carried out by "virtual teams" – people that work together but don't sit together – and relies for success on being able to identify responsibilities, streamline interactions, share knowledge, manage time and re-plan as you go along.

Using another analogy, if you just want to play a few tunes with your friends, you don't need a collaboration tool at all. But if you want to create the next Glastonbury Festival, you might want to consider using a tool appropriate for the job.

Author

Keith Harrison-Broninski is CTO of Role Modellers, a Gartner BPM Cool Vendor 2012. The company mission is to develop understanding and support of human-driven processes - the field that Keith pioneered. Its software product, the Human Interaction Management System (HIMS) **HumanEdj**, provides unique software support for collaborative, adaptive human work across multiple organizations.

Keith has been regarded as an IT and business thought leader since publication of his 2005 book "Human Interactions: The Heart And Soul Of Business Process Management". Building on 20 years of research and insights from varied disciplines, his theory of Human Interaction Management (HIM) provides a new way to describe and support collaborative human work. Keith speaks regularly about HIM and the associated change management methodology Goal-Oriented Organization Design (GOOD) in keynotes to business, IT and academic audiences at national conferences, most recently in Poland, India, the Netherlands, the UK, Finland and Portugal.

More information about HumanEdj is available at www.rolemodellers.com and about Keith at **BPTrends LinkedIn Discussion Group** . Go to LinkedIn and join the [BPTrends Discussion Group](#).
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