



## Points of View

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## Process Project Perspectives: Hope is not a Strategy and Ignorance is not Bliss

*“A different point of view is simply the view from a place where  
you’re not.”*

From a series of posters sponsored by HSBC in Heathrow Airport

Process change projects are inherently risky propositions, and the bigger the change the riskier they become, since there are more perspectives to derail the effort and exponentially more unknowns to be dealt with. There are also more people who have an opinion or want a say in the end result. Some of them are involved in the process in some way. Some are affected by the process indirectly. Some are just interested but still have some point of view. Many of them are not clear on their view or why they have it but that will not stop them from disagreeing with one another at some point regarding what’s important or needed. In many cases they do not even know they do not agree on what success looks like. But one thing seems to hold true. If the results do not satisfy everyone it won’t be much fun, especially if we find that out late in the game. The cynics may say that we can at least pass the buck and blame the process project team and certainly the project manager for not satisfying the set of unaddressed and irreconcilable differences. Meanwhile the business suffers from a lack of required process capability. There will be plenty of blame to go around, but as my favorite Murphy’s Law states, “Whatever hits the fan will not be evenly distributed,” so duck.

So why does this happen, and what can we do about it? In my experience, process projects go off the rails more from unaligned expectations and lack of common ground than anything else. We are smart enough to do the work if we know what we are aiming for. If everyone has a different understanding about what success looks like, then the project will definitely fail, either in its operational results or its execution.

One thing about process perspectives is that most people are not clear about them or even aware of them in many cases. I refer to these as tacit perspectives as opposed to well-documented, explicit ones. An example of an unaware tacit perspective is one that comes from a functional group leader who argues for their group’s interest. Such an individual might be the Sales VP who will argue against any process that counts returned goods as a deduction from the sales incentives scheme, even if it is better overall to **not** sell something that will lead to customer dissatisfaction after the sale. I am not implying that sales people do not have the interests of the company at heart, but they will not jump, just like that, behind something that is worse for them. Even if tacit views are not always apparent, that does not mean that the conviction for them is weak. It could even mean that they may not be so easy to articulate, but usually the holder remains firm in disagreement. If this happens at the end of the project, the consequences will be more severe than if the disagreement is aired earlier in the process project. As the number of stakeholders expands, so does the likelihood that multiple unarticulated perspectives exist and

that it will be harder to get everyone pointed in the same direction. The bigger the process and the more stakeholders we have to deal with, the greater chances of tacit expectations, the greater misalignment of expectations.

### Outsiders and Insiders

The main perspective differences are the ones that occur from the outside looking in versus the inside looking out. We get in a lot of trouble when the outsiders can see what's happening inside, as shown by Figure 1a and b.

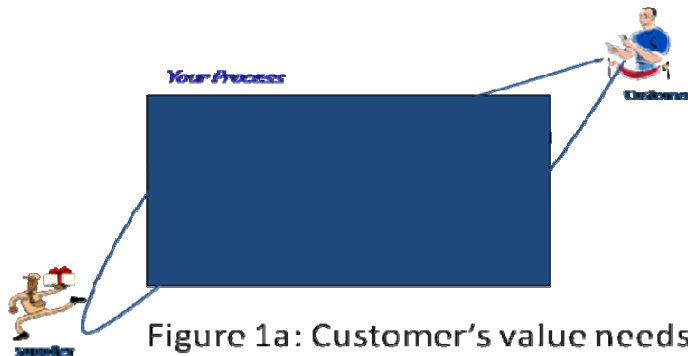


Figure 1a: Customer's value needs

What happens is that the customer is often dragged across our internal organization chart from department or group to department or group in order to get anything done. Each part of the organization has a different perspective on how to optimize their part, and they build capability from their own separate budget to do so. Typically, this occurs because no one ever recognizes the full set of outsider interactions as a process, except the customer who is experiencing the frustration, of course. So when we try to conduct a process project it should be no surprise that we get a lot of different mindsets coming into play. The customer drivers should be clear but often are misunderstood by insiders. Insiders also often don't seem to be all that concerned with the outside view, for a variety of awareness and motivational obstacles. So when we ask the insiders what we need to achieve in our process projects we often get a lot of different answers. Many of these have become mantras or platitudes about which the respondent does not have much of an understanding. The following are some that I have heard many times:

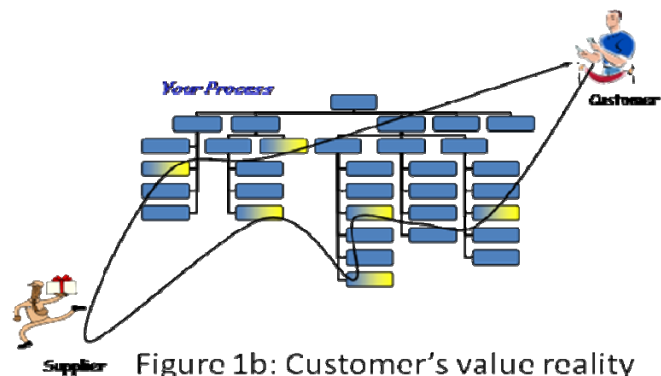


Figure 1b: Customer's value reality

- Improve the process
- Lower our costs
- Get higher revenue
- Reduce waste
- Become more efficient
- Become more reliable and consistent
- Reduce defects and variation
- Become lean
- Lower the cost of non-conformance
- Become more flexible
- Get more reuse of our services
- Get more reuse of our assets
- Reduce downtime
- Smooth out the work
- Grow the business
- Increase our market share
- Increase customer spend
- Simplify what we do
- Reduce workload
- Incur fewer regulatory violations
- Make our staff happy
- Reduce employee turnover
- Prove we are compliant
- Reduce our carbon footprint
- Become green
- Reduce accidents and become safer

Many of these can be reflected in the business performance chart shown in Figure 2, first shown in my book, *BPM: Profiting from Process*.

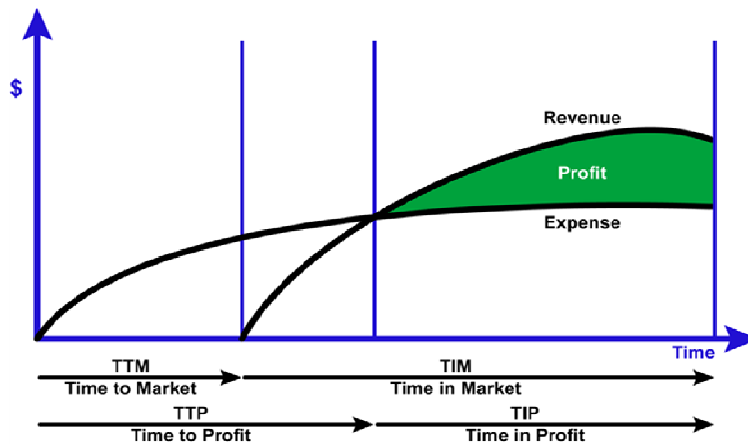


Figure 2: Improving Business Performance

This picture plays well with senior insiders since it captures four traditional dimensions of performance required to put more green space (ROI) on the page:

- North – increase revenue
- South – reduce expense
- West – get to market faster
- East – stay in market longer

However, these merely represent a starting point, and there is no guarantee that managers and other internal stakeholders are of a like mind on the compass points in play or what each one of them actually means with regard to the process in focus. Perhaps the sales managers are looking north, the operations departments looking south, the R & D professionals looking west, and the product managers looking east, whether they realize it or not. I know that as project manager I need more. I need to know and have everyone else agree on the balance of “How much?,” “By when?,” and, unequivocally, “How will we all know when we have gotten there?”

Borrowing strongly from the Object Management Group’s Business Motivation Model (BMM), I advocate strongly the creation of a common commitment to a Process Charter that describes the process project, in order to create one integrated perspective. Make sure that everyone can describe the following consistently:

- The enterprise “Raison d’être” (mission)
- The enterprise’s differentiation (value proposition)
- The beliefs and values of the enterprise (principles)
- The target future state after a fully successful process implementation and rollout (vision)
- The added value to be received by stakeholders, once complete (goals)
- The aligned stakeholder Key Performance Indicators for the process (units of measure)
- The target performance improvement of the KPIs and timing (objectives)
- The common understanding of the project critical success criteria (CSFs)

If you take whatever time it takes to get these precepts in place at the beginning of your effort, you will more than make up the difference in executing the project, and the results will be of much greater quality. You will have established criteria for decision making and consensus seeking that will be used all the way through the project. The principle in play is “Establish your criteria before making any decision.”

## Aligning Perspectives at the Beginning

In my experience, getting started is the hardest part of any process project. There are lots of unknowns and, at the same time, a lot of pressure to get it done fast since there is a deadline to be met or a system to be built. It is not until roadblocks are hit and differences of opinion clearly or subtly appear once underway that we realize that different people are using different criteria to object or to support the emerging solution. By then we are committed to dates and other teams are waiting in the wings. The pressure is enormous. Many of us start up and just get going with one of the vague intentions from the lists shown earlier and just hope for the best. Figure 3 shows where hope lies.

It is to be expected that each insider and outsider will have a view and a set of expectations by which each will advocate and judge the conduct and results of the process change. The first question we must ask ourselves is “Do we know what these are? Are we sure? How do we know?” If we are unaware of the various interests and do not take time to gain that understanding, then we will be at tremendous risk since surprises will surely come, usually downstream when we can least afford to deal with them. If we are aware of the different points of view we can at least have a plan to get them aligned if they are not already. Figure 3 shows a quadrant of possibilities that we may start with and implies an action plan for attaining our position of confidence and commitment to the effort at hand, depending on the going-in position of awareness and alignment.

It is safe to assume that when starting up a process initiative, all points of view, interests, and judgment criteria will not be known. We will all be unaware of one another’s criteria even if we think we **are** aware. Let’s take each quadrant in order.

### **Hope**

I will deal with this quadrant first since it represents some form of delusion on behalf of those who start here. It basically says that we just start off in the project without dealing much with why we are doing what we are doing and what represents success for all, and that everyone somehow magically will agree so we do not have to address the risk of being wrong.

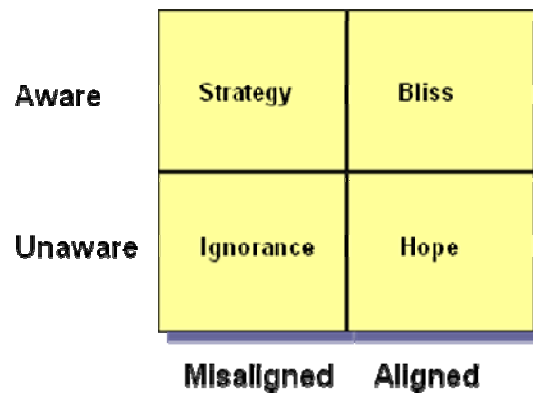
If our assumption of perfect fit proves to be true and we all agree on what’s right, then that’s pure luck. So ask yourself when you start a process initiative: “Do you feel that lucky?” Having said all this, many process projects start off in just that way, with little in the way of planning and alignment activities. As a result, many fail entirely or experience serious derailments along the way.. Frequently, these unhappy outcomes are the results of the attitude that says: Do not waste time on alignment. Hurry up and get started. do your best, and it will all work out somehow. It scares me.

### **Ignorance**

This quadrant represents the typical starting reality. We are typically misaligned but do not know to what extent.. Any experienced process practitioner will be pretty sure that at the outset of any process initiative there will be different goals from different people, although he or she will not know what they are at this point. The first step in each project then will be to discover the assumptions of each internal stakeholder, without judging them or attempting to change anything yet. Seek first to understand.

### **Strategy**

Having gained an understanding of the misalignment inherent in any multifunctional process improvement initiative, and having conquered the ignorance we started with in the last quadrant,



**Figure 3: Perspective Alignment**

it is now time to change some perspectives and get them aligned with our outsiders' perspectives. At this point, the Process Charter should be invoked and presented, gaining acceptance one point at a time from the top and working down. This step **must** occur before the process change project gets into analysis or design, since the charter provides the needed criteria that become the team's marching orders. The arguments resulting from unaligned perspectives are resolved at this point, having been understood and dealt with previously. The techniques to accomplish this will be critical since it will be difficult for some to get on the same page, especially if it's someone else's. There will be feelings and emotions to deal with. Strategically, taking an outside-in approach by starting from outsiders' values to insiders' requirements and following the charter in team workshops is best practice. Clearly, but it will require effective facilitation.

### ***Bliss***

With an iron clad, documented Process Charter that has been agreed upon and signed off on by all insiders who can express their point of view, the project can begin with confidence. It will not be burdened down the line with the usual roadblocks--hidden agendas, changing opinions, outright subversion, thrashing, and surprises regarding how well the process is working, what we should use as measures, the causes of performance problems, and what constitutes an appropriate solution.

### **Conclusion**

The biggest barrier in process projects and in day to day process performance management is lack of personal goal alignment with business and customer needs. When we ensure the project motivation model is personally aligned and remains visible, we will be OK. Developing a commonly accepted Process Charter up front will serve up savings and peace of mind. So find a way to carve out time for this underappreciated work early on in the project.

That's how I see it.