



Human Processes

Keith Harrison-Broninski

CTO Role Modellers (www.rolemodellers.com)

khb@rolemodellers.com

Virtual Teams

Many people are wary of process analysis and automation. Although they see its advantages for the clerical staff members who do routine and repetitive work, they do not feel that it offers anything to them personally. They recognize that their own work may not be 100% efficient or effective, but look for solutions elsewhere – typically, in technologies for document sharing, instant messaging and other social media tools.

You may have seen for yourself that such technologies are not true solutions. They make **communication** more effective, but do little for **collaboration** – i.e., they do little to support the coordination of activity that wastes on average 28% of each knowledge worker's day (Basex) and the lack of focus on goals that results, for example, in the failure of 70% of change initiatives (Harvard).

To solve these expensive problems, it is necessary to provide features that you cannot get from social media tools, namely:

1. A means to build **effective teams**;
2. Goal-directed **communication structures**;
3. A means to create, maintain and use **knowledge**;
4. Support for **prioritizing time**;
5. Participation in the **continual re-planning** that is basic to effective team work.

You may recognize these as the 5 principles of Human Interaction Management (HIM).

So recently I have started to explain the problems of knowledge worker efficiency and effectiveness differently. I now talk about these problems in terms of **virtual teams** – i.e., teams assembled to achieve specific goals. Members of a virtual team may not be co-located. They may not even know each other personally.

Most knowledge workers work in virtual teams. Further, knowledge workers do not do the same tasks in the same order, creating the same documents and data, for each assignment – so they find it hard to visualize and hence manage the structure of their work. As a result, neither virtual team members nor virtual team managers even know to what extent the team is working in an efficient or effective way, let alone have a means of improving things.

What they need is to **streamline interactions between colleagues** and **ensure focus on goals**, thus **reducing virtual team costs** and **improving effectiveness**. The means of achieving this is to move away from reliance on a predictive-reactive project management approach (i.e., away from a scheduling-based technique that either anticipates what is about to happen, or records what did happen) and towards the interactive, dynamic approach of HIM.

The basic technique in HIM is to break down the overall goals of a virtual team into distinct sub-goals, then assign each of the sub-goals to a Stage in a Plan. Stages are numbered, but may be used in any order and are often concurrent and/or repeated. Inside each Stage, people play

Roles to provide Deliverables to each other. A common Deliverable is a sub-Plan, governing the operation of a “lower-level” virtual team. If you use a HIM tool such as HumanEdj, progress is visible to all concerned in real-time via the statuses of Stages, Roles and Deliverables.

Plans can be copied, modified and re-used as templates for other Plans, thus providing a route to continuous improvement of knowledge work.

To illustrate use of HIM, I will discuss a common sales process – preparing a sales proposal.

Sales Proposal Preparation – Plan Design

For “complex sales” where a formal proposal is required, most organizations use a variant of the Stages shown below:

1. **Lead Qualification**
Is it a strategic fit? Do we have or wish to develop the necessary capability? Is the financial reward worthwhile? What are the chances of winning?
2. **Build Bid Team**
What staff should be involved? Do we need to include third party sub-contractors?
3. **Design Solution**
How can we meet the customer's requirements?
4. **Review Solution**
Will it work? Is it what the customer wants? Could it be done more cheaply? Is the price viable for the customer?
5. **Create Proposal**
Design and create the necessary document sections.
6. **Review Proposal**
Are we presenting this in the best possible way? Have we met the terms and conditions? What are the risks?
7. **Submit Proposal**
Liaise with customer and/or sales staff to follow up progress.

The Roles involved in a Sales Proposal may include the following:

- **Bid Manager** (responsible for a specific proposal)
- **Proposals Manager** (responsible for all sales proposals)
- **Technical Expert** (advice and ideas)
- **Bid Writer** (writes the proposal)
- **Sales Manager** (responsible for sales of specific products)
- **Account Manager** (responsible for specific clients)
- **Product Manager** (responsible for development of specific products)
- **Commercial Manager** (responsible for legal and contractual matters)

For brevity, I will omit details of the Deliverables prepared by each Role, which can be specified either via a spreadsheet or via a dedicated HIM tool such as HumanEdj.

Often Sales Proposal Preparation will initiate and interact with subsidiary processes for Delivery and New Product Design, which may run in parallel. Again for brevity I will not discuss these subsidiary processes further here.

A Bid Team is a virtual team, of course. The figures below show how use of HIM deals with the concerns of key team members. Overall benefits of using HIM are given in the next section.

Bid Manager



'I have a short time to build a team and help them deliver a high-quality proposal'

Key goals

- Ensure that everyone understands and accepts their responsibilities
- Gain consensus on proposal details
- Keep track of work as it progresses
- Deal with issues as they arise



Behaviours

- People - Investigator
- People – Coordinator
- Cerebral - Plant
- Leader - Manager

✓ HIM

- Roles with responsibilities
- Goal-directed communications
- Stage statuses
- Dynamic re-planning
- Access to possible team members
- Shared Plans
- Goal-directed communications
- Shared Plans

Proposals Manager



'I must ensure that all proposals are delivered as fast and as well as possible'

Key goals

- Maintain focus on the "right" proposals
- Help Bid Managers as required
- Streamline the flow of proposals
- Improve proposal handling generally



Behaviours

- Action - Shaper
- People – Investigator
- Cerebral - Evaluator
- Leader - Executive

✓ HIM

- Overview of Plans in progress
- Drill-down to details
- Visibility of resource bottlenecks
- Continuous improvement via Plan template re-use
- Sharing of key documents and data, always up to date
- Roles with responsibilities
- Sharing of key documents and data, always up to date
- Stage statuses

Technical Expert



'I need to understand the context of a proposal in order to contribute effectively'

Key goals

- Understand the requirements as quickly as possible
- Know who to go to with queries
- Communicate my ideas to the team
- Get fast, clear feedback



Behaviours

- Action – Shaper
- Action – Implementer
- People – Teamworker
- Cerebral - Specialist



HIM

- Sharing of key documents and data, always up to date
- Roles with responsibilities
- Goal-directed communications
- Goal-directed communications

- Sharing of key documents and data, always up to date
- Roles with responsibilities
- Sharing of key documents and data, always up to date

Bid Writer



'I need access to the people who know technical details and eventual audience'

Key goals

- Get solution details as they develop
- Know who will read my work
- Know who to go to with queries
- Get fast, clear feedback

✓ HIM

- Sharing of key documents and data, always up to date
- Roles with responsibilities
- Goal-directed communications

Behaviours

- Action – Shaper
- Action – Implementer
- Action - Finisher
- People – Teamworker
- Sharing of key documents and data, always up to date
- Roles with responsibilities

Sales Manager



'I must ensure that proposals align with overall strategy and with my own plans'

Key goals

- Get sight of proposals as early as possible
- Stay up-to-date with progress on proposals
- Ensure that my requests are acted on



Behaviours

- Action - Shaper
- Cerebral – Plant
- Cerebral - Evaluator
- Leader - Strategic

✓ HIM

- Sharing of key documents and data, always up to date
- Stage statuses
- Goal-directed communications

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Sales Proposal Preparation – Benefits

The key benefits achieved from handling sales proposals via HIM are shown in Table 1.

Table 1: Benefits of using HIM for Sales Proposal Preparation

By ...	Reduce ...
Streamlining interactions between Bid Team and senior colleagues	Effort of engaging with Account Manager, Product Manager, Commercial Manager and Sales Manager
Using shared, dynamic Plans to identify and resolve issues	Stress and workload for Bid Managers
Working together efficiently in the Bid Team	Time needed from Technical Experts
Spending less time on coordination	Total effort cost of each sale

Conclusion

Just as people are changing inexorably from diaries and address books to digital calendars and contact lists, so too will they change from static plans to a more flexible, powerful way of managing their work with colleagues. However, listing tasks is not enough, or people would have switched already. HIM provides a way to create dynamic plans that allow virtual teams to **streamline interactions between colleagues** and **ensure focus on goals**, thus **reducing virtual team costs** and **improving effectiveness**.

People lose on average nearly a third of their time to coordinating their work with others, rather than doing it. When you take into further consideration the amount of work that is not directed towards tactical or strategic goals (i.e., work that could be avoided altogether), then you start to realize quite how much time everyone is wasting – and what this is costing.

For a manager, there is a major quick win to be made here, and for a worker, the HIM technique (especially if used with a HIM tool such as HumanEdj) can reduce your workload by a significant amount each day. Both get less stress – and to go home earlier.

Author

Keith Harrison-Broninski has been regarded as an IT and business thought leader since publication of his book “Human Interactions: The Heart And Soul Of Business Process Management” (Meghan-Kiffer Press, 2005 - "a must read for Process Professionals and Systems Analysts alike"). 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.

Conference organizers around the world regularly invite Keith to give keynote lectures to business, IT and academic audiences at national conferences, most recently in Poland, India, the Netherlands, the UK, Finland and Portugal.

Keith is CTO of Role Modellers, whose mission is to develop understanding and support of human-driven processes - the field that Keith has pioneered. The Role Modellers software product HumanEdj leads the industry in computerized support for innovative, collaborative human work and is free for individual use.

Keith stays active as a change management consultant, via which activity he continues to refine and extend HIM theory and the associated methodology Goal-Oriented Organization Design (GOOD).

More information about Keith and his work is available online (<http://keith.harrison-broninski.info>).

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