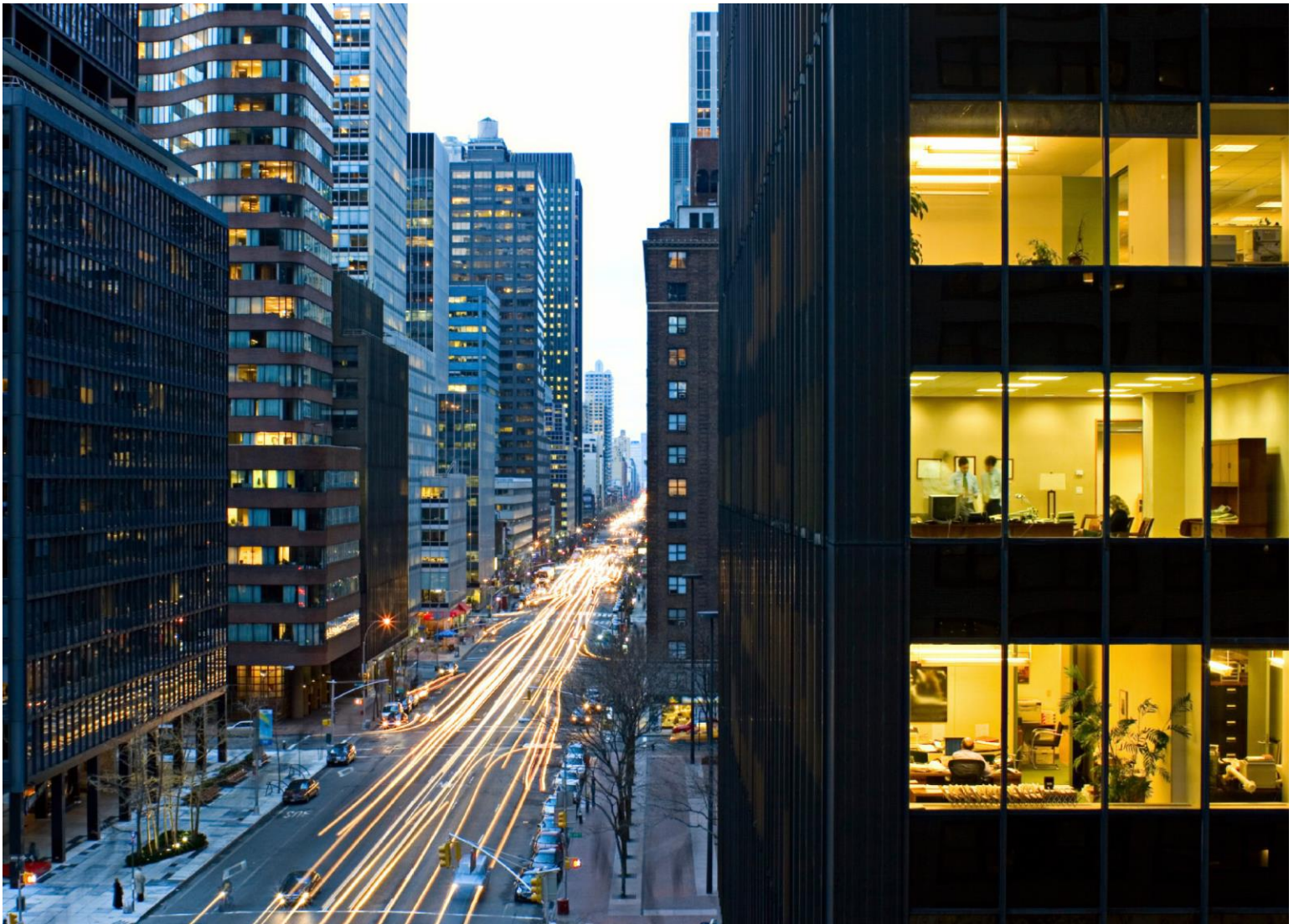


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BUSINESS INSIGHTS
COLLECTION

You think you need a new system, but maybe all you need is a new process

*Find out the essential questions you need to ask about process improvement,
what to look for if you're hiring a consulting firm,
and the surprising relationship between process and growth*



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It could be that all you know is something isn't working well.

Quality on the production line isn't consistent. The customer experience is broken somehow. Too many of your projects seem to wither and die.

You need to get to some future state, but it's hard to define what that future state is, let alone know how to get there.

You start tossing around ideas. "We need to be using our technology differently." "Let's get a new CRM." "We need a project management tool."

But how? And why? And which?

Solutions all feel piecemeal, but you can't find a better way to do things.

It starts with process improvement

Process is always the place to start. When you find problems, consider changing your process before you make an expensive investment in software, equipment, or personnel.

The root of your problem could simply be that people don't have the clarity they should about process. Giving them that clarity could solve a lot of problems and reduce frustration.

In a nutshell, process improvement means looking at how things are done, analyzing the relevant data, finding ways to do them more efficiently, testing solutions, and getting buy-in on any changes.

Key questions to ask

If you're considering a process-improvement project, here are some questions you might want to ask.

1. Does your organization already have a process map?
2. Do people know it, is it at the right level of detail?
3. Do they understand it and agree to it?
4. Do they use it in their work?
5. At what point does the current process frustrate people or create choke points?

The root of your problem could simply be that people don't have the clarity they should.

Keep in mind that a process-improvement project is a *project*, so if you do decide to make a change, you'll also want to ask the relevant project-management questions.

1. Do you have a project management process?
2. Has your organization done a similar project before? If so, can you leverage the same approach?
3. Have you identified the project's key stakeholders?
4. Do the stakeholders agree on the project and its goals?
5. What's the scope and complexity of the project? If the project is high-risk or requires a lot of executive communications, you may need someone senior running it. Otherwise, perhaps someone with less experience can run the project effectively.
6. What is your budget?
7. When is your deadline?
8. What are the key risks?
9. Does the project align with the goals and mission of your organization?
10. Is the right team on the bus? Be sure that, collectively, they have the expertise to get the job done.
11. Do you have an ROI?
12. Do you have a change management plan in place?

Many teams are overworked and under-resourced. There's just no time to do the work without help.

Process improvement, like most business projects, is work you can do in-house. You *can* do the exploratory work, document processes, map them, come up with a solution, and make recommendations.

But many teams may lack the experience, or are overworked and under-resourced. There's just no time to do the work without help.

If so, don't be afraid to look for experienced help.

Guidelines for hiring a consulting firm

If you *are* at the point where you're ready to consider a management consultancy, here are some key things to keep in mind.

Background and Experience. The consulting firm should have comfort and experience with process improvement in multiple industries and areas of operations. This helps bring a broad range of solutions to bear. Make sure their certifications, experience, and areas of expertise align with the work you need done. Look for a consulting firm that can help you visualize every point where your customer -- internal or external -- experiences friction or frustration.

Look for a consulting firm that can draw from many schools of thought.

Tactical skills: Look for research and analytical skills, and the ability to gather, interpret, and present data in a format that's easy to consume.

Methodology. You want consultants who know multiple process disciplines, including lean, Six Sigma, and Total Quality Management. If your company already has a process improvement infrastructure in place, you want to know if the consulting team can help you accelerate that process.

Approach and Adaptability. It's important to understand that there may be more than ONE approach to process-improvement problems. So look for a consulting firm that can draw from many schools of thought and recommend an approach tailored to your needs.

Leadership. Process leads need to be able to create collaborative project teams where every member is heard. Since they act as leaders without authority, your consultants MUST connect with you and your team. It takes charisma and likeability to succeed -- just as much as having the chops.

Curiosity. Consultants should ask the "tough" questions and seek answers tenaciously.

Cost. Be sure to do the math around hiring a full-time employee vs. bringing in a process lead consultant. It is usually a long-term commitment to hire an employee to improve and manage your processes. If you expect to have a long series of process improvements this may make complete sense. However, it may make sense to hire a consulting firm if your needs are more finite in duration.

Strategy session. Since you want a company you can build a relationship with, the consulting firm should be willing to do an initial strategy session. From this initial engagement you will be able to assess their strengths and overall fit with your team.

An understanding that one size DOESN'T fit all. Look for a consulting firm who will LISTEN first, to find out what your problems are, before they begin suggesting solutions.

Big-picture outlook. The consulting firm should be able to tie the proposed work back to improved value or return on investment, such as a better experience for employees, a better client experience, fewer process steps, etc.

What's the most surprising thing about process improvement efforts?

Companies typically think they'll chase growth first, *then* implement process. But that's backwards. It just creates inefficiency that you need to deal with later -- when it's even harder to deal with.

Instead, you need to get your processes in place first -- so you can grow FASTER.

Get the complete story

This introductory paper is intended to provide a high-level overview of process improvement elements you may want to consider on projects. This is the first paper in a series that will provide in depth examples of projects we've delivered on for our clients. If you have an idea for a future paper or a topic you would like to learn more about, please reach out to us using the methods listed below.

If you like what you've read, we invite you to meet with us to get the complete Loft9 story—and how it can help make your business more effective.

About Loft9

Loft9 Consulting is a management consulting firm that provides business analysis, project management, change management, and process improvement across the entire business lifecycle -- from envisioning to deploying and optimizing.

At Loft9, we're as focused on the expertise we deliver as on the experience we create. Our clients get fresh thinking, sincere partnerships, and elevated outcomes. Together, Loft9 is able to be there for our clients, at the right time, with the right resource, consistently producing great results. That's the Loft9 experience.

We actively collaborate with and leverage the knowledge of other Loft9 Associates for the benefit of clients. Co-Delivery™ is our "secret sauce." Co-Delivery™ helps provide a quicker ramp time and the highest quality in delivery. We pair every Associate on an engagement with someone else from within the firm who has relevant experience in the space. More than just a check-in, Co-Delivery™ leverages experience and knowledge to bring additional resources to bear each and every week for the benefits of our clients and our delivery.

Our clients keep coming back to us year after year. When we ask them why, they mention our expertise and the results we deliver, but it always comes back around to the quality of our people. They say that when you're working with Loft9, it's the intangibles, it's the communication, it's the way we collaborate and deliver.

It's the experience.

Contact

Seattle: 425-462-6384

135 Lake Street South Suite 240, Kirkland, WA 98033

Denver: 720-932-8077

1400 16th Street 16 Market Square, Suite 400 Denver, CO 80202

Email: info@loft9consulting.com