

# Business Processes Improvement Workflow Planner

We recommend a 6-step approach to improve your business processes so they deliver desired results.

**Step 1:** To determine performance gaps, start by creating a flow chart in the space below for one key product or service with varying levels of details on how they are related. Use a separate sheet if you need a larger space:

Product/Service	
Organizational Contributors	
Sub-sections Of Each Group	
Sub-processes For Each Subsection (draw arrows in alignment with the main sections(s) of the organization)	
List the steps in each sub-process	
List the inputs that contribute to each process (ex: raw materials, instructions, machinery, technology)	

**Step 2:** At the top of the flow chart, list current results for each client/customer product or service, then the optimal results you want to see. Identify indicators/measures for each gap in results.

- ▶ The gaps between current results and desired results are where the problems lie,
- ▶ so you can use these gaps to help identify the process(es) you want to improve, then
- ▶ find the connections with the greatest gaps in results and identify combined gaps that will provide maximum improvement.

**Step 3:** Determine why these interconnected gaps in results are occurring by:

- ▶ Reviewing documentation and product or service specs, then confirming findings by surveying a broader group of relevant individuals.
- ▶ Interviewing relevant internal and external individuals who can provide useful information, then
- ▶ conducting focus groups with people who represent different parts of the process or who know how the entire process works
- ▶ which should include key stakeholders, staff performing the job, and others whose tasks relate to the challenged process(es).

**Step 4:** Determine the essential solution criteria.

**Step 5:** Develop a formal implementation plan that integrates essential solution criteria into the existing and new process(es).

**Step 6:** Test the revised and new process(es) and determine what must be amended for optimal results.

Once complete, conduct a change management initiative to develop full organizational readiness. Helpful related reading:

- ▶ <https://www.td.org/atd-blog/the-what-why-and-how-of-needs-assessments>
- ▶ <https://www.techtarget.com/searchcio/definition/business-process-improvement-BPI>