Life is a Process: Understand, Define, Execute

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Session Description

You execute many processes each and every day, without even thinking about it. In fact, you're executing a process right now. Clicking on this session description is a trigger. Opening, reading, and comprehending these words lead you to say; Yes, I should attend this session. Join us for an entertaining, informative, and interactive session designed to provide you with a much deeper understanding of processes, what they support, what's needed to make them effective, whether they prevent or promote innovation, and more.

Speaker Background

Ken Wendle, known for his pragmatic and insightful advice, whether as instructor, consultant, or speaker, is a cofounder and past president of the itSMF USA and past member of the HDI Strategic Advisory Board. Ken is recognized for his pivotal role in creating awareness, adoption, and global expansion of ITIL and ITSM best practices. He is the author of numerous white papers and articles, and his entertaining presentations have been a enjoyed nationally and internationally. Ken is also the only person (thus far) to have received two prestigious industry awards: the itSMF USA Lifetime Achievement Award (2007) as well as the HDI Ron Muns Lifetime Achievement Award (2016).

FUSION 17

DRIVING SERVICE MANAGEMENT FORWARD

Life is a Process:
Understand, Define, Execute

Session 706

Ken Wendle, FSM

Edify ITSM, Inc.

> Introduction complete.

Trigger acknowledged.

Verify input.

Presentation process initiated.

Process Step 1: Agenda

- Life is a Process
- What is a process?
  - Exercise
- The Anatomy of a Process
- Process Inaction vs. Process In Action
  - Tools & Technology
  - Cultural Integration
- Summary (Q&A Along the way!)

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“Life is a process.
We are a process.
The universe is a process.”

- Anne Wilson Schaef, Author

What is a Process NOT!

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What is a Process?

Simply stated… a Process is:

"A structured set of activities designed to accomplish a specific objective.

A process takes one or more defined inputs and turns them into defined outputs."

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What is a Process?

A process has several components and all processes have four specific characteristics.

Let's dig deeper into those components along with those characteristics!

"Process Model"

But First…

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Exercise

The Paper Snowflake Process

Exercise

The Paper Snowflake Process

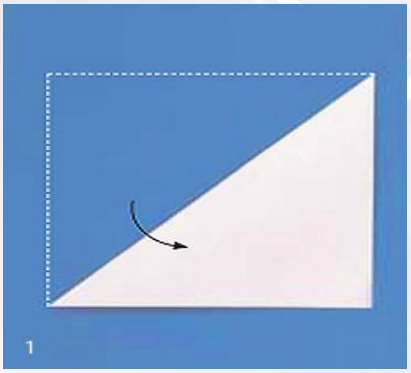
Process Steps:

1. Fold the paper in half
2. Fold into another triangle
3. Fold into thirds
4. Fold from the left
5. Fold from the right and make adjustments
6. Cut across bottom
7. Cut lines into triangle
8. Unfold Paper

Exercise (Part 2)

Procedures and Work Instructions

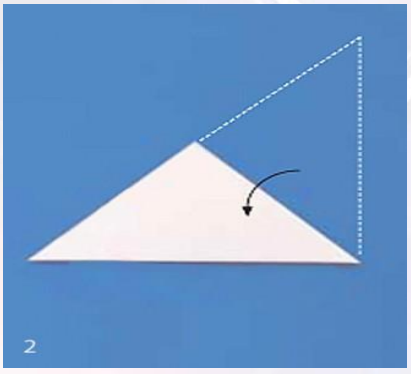
1. Fold the paper in half
   - Fold the paper from the upper left corner of the sheet of paper to the lower right forming a perfect triangle
   - Press down on the crease



Exercise

Procedures and Work Instructions

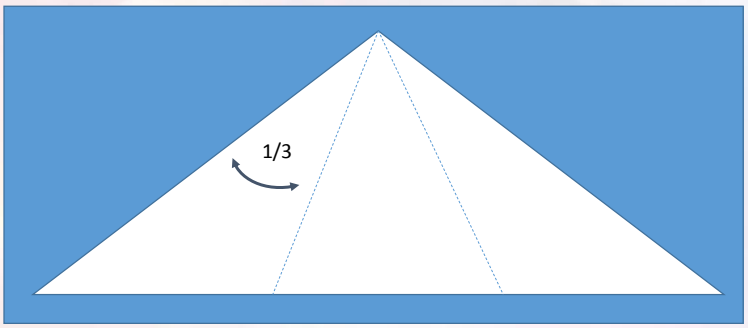
2. Fold into another triangle
   - Fold the paper triangle created in step one from the upper right to the lower left forming a smaller perfect triangle
   - Press down on the crease



Exercise

Procedures and Work Instructions

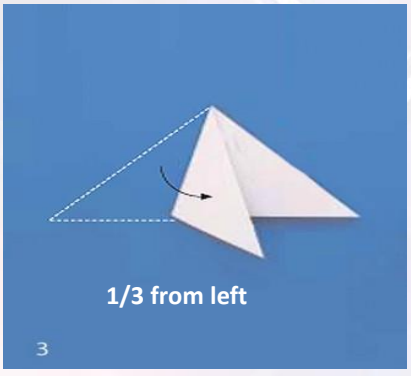
3. Fold the paper into thirds



Exercise

Procedures and Work Instructions

4. Fold from the left
   - Fold the smaller paper triangle created in step two from the lower left to the lower right forming an even smaller perfect triangle.
   - Press down on the crease

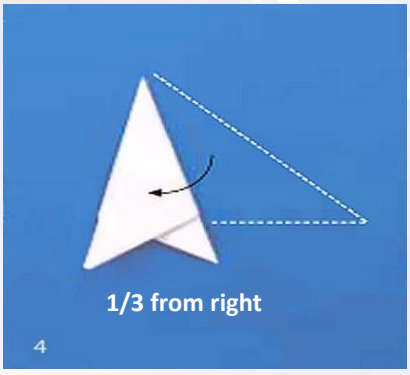


Exercise

Procedures and Work Instructions

5. Fold from right, and make adjustments

- Fold once more from the right to the left
- Adjust the fold so that the result is in the shape of an arrow, with a small up-side-down “V” shape at the bottom
- Press down on the crease

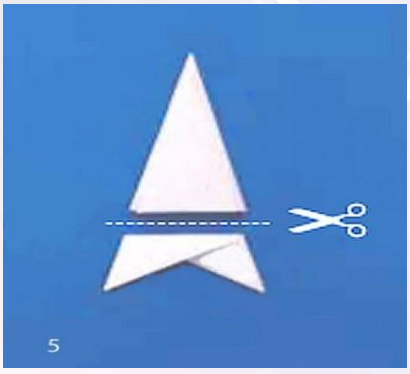


Exercise

Procedures and Work Instructions

6. Cut across bottom

- Remove the upside “V” shaped portion of the output of step 4 by cutting horizontally ½ inch above the apex of the upside down “V”.



Exercise

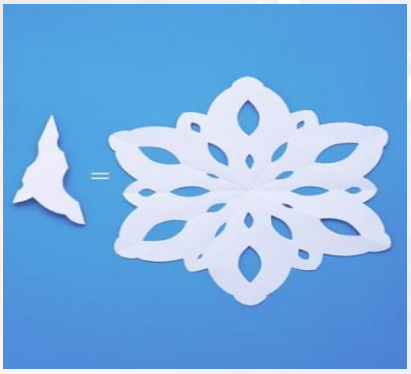
Procedures and Work Instructions

7. Cut lines into triangle
   - *Carefully* cut 3 small triangles along the "folded side" of triangle produced by step 5.
   - Be careful NOT to cross the entire triangle

Exercise

Procedures and Work Instructions

8. Unfold Paper
   - Carefully unfold the triangle to reveal your snowflake!
   - Like "real" snowflakes, no two will be exactly alike!



“Life is a process of learning

- Lauren Hill, American Musician

So, what did we learn?

Process success requires:

- **A clear idea of what the outputs should be**
- **Defining and using the right inputs**
- **More than process *activities***
  - **Sufficient detail (Procedures & Work Instructions)**
- **The right resources**
  - **Funding, tools, etc.**
- **The right capabilities**
  - **Knowledge, understanding, skill sets, etc.**
- ***Understanding the Anatomy of a Process***

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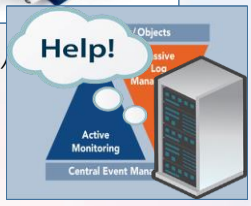
Any Questions so far?

The Anatomy of a Process

Processes respond to specific triggers

- ***Time Trigger –***
  - *Every morning at 6:15 a.m.*
  - *Every Tuesday at 9:00 p.m.*
  - *First day of the month*
  - *Last day of the quarter (or year)*

- ***Occurrence Trigger –***
  - *A phone call*
  - *An online "submission" (order, request, etc.)*
  - *Something (or someone) "shows up"*
  - *A "world event"*
  - *An infrastructure event*
    - *Information*
    - *Warning*
    - ***Exception***



This is a characteristic (#1) of ALL processes!

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The Anatomy of a Process

The "Raw Materials" used by or within a process necessary (quantity and quality) to create and deliver the correct output expected from the process.

(Inputs may be outputs from other processes.)

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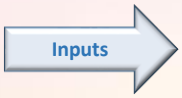
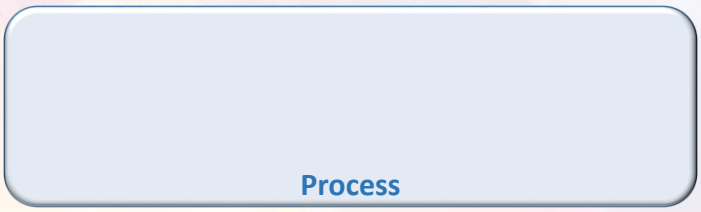
The Anatomy of a Process





The quality and quantity of that which is produced and delivered by the process.

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The Anatomy of a Process

A Process Delivers Specific Results

Outputs

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The Anatomy of a Process

A Process Delivers Specific Results

Outputs

Process	Result
Incident Management	Restored Service
Problem Management	Root Cause Determined
Change Management	Successfully modified Infrastructure
Availability Management	More reliable services, less unscheduled downtime
Business Relationship Management	Satisfied Customers

… And so on.

This is a characteristic (#2) of ALL processes!

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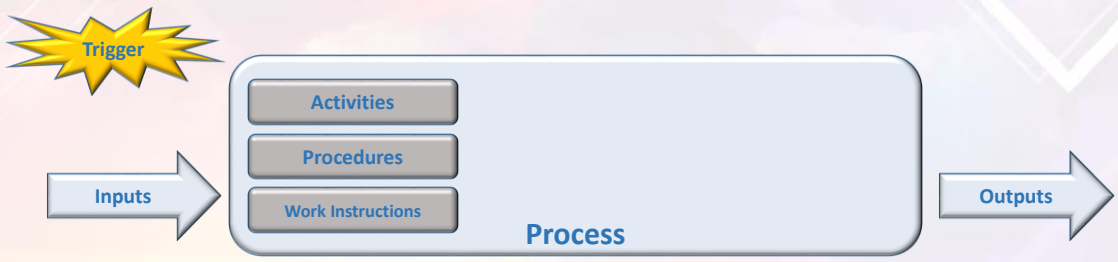

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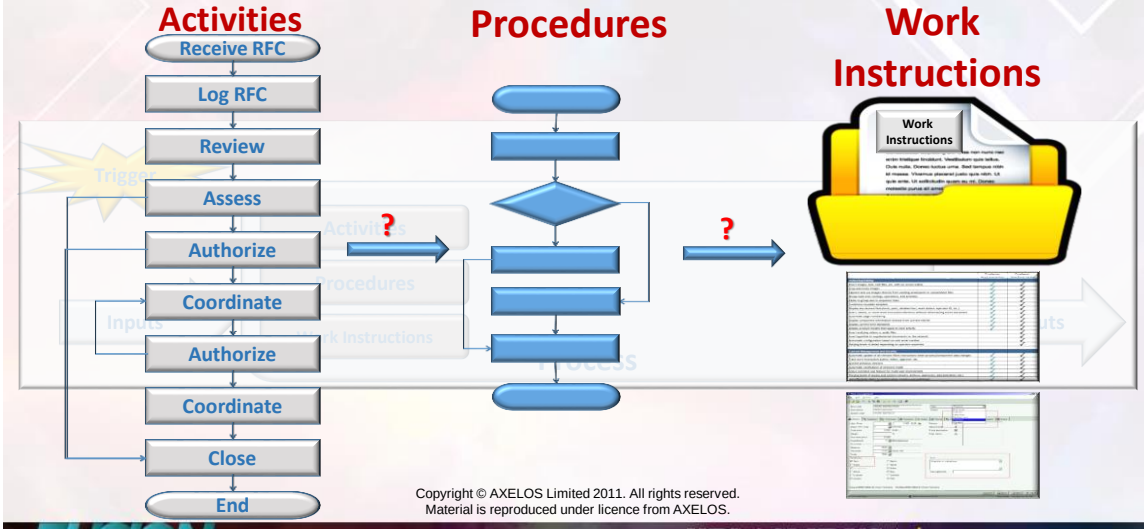

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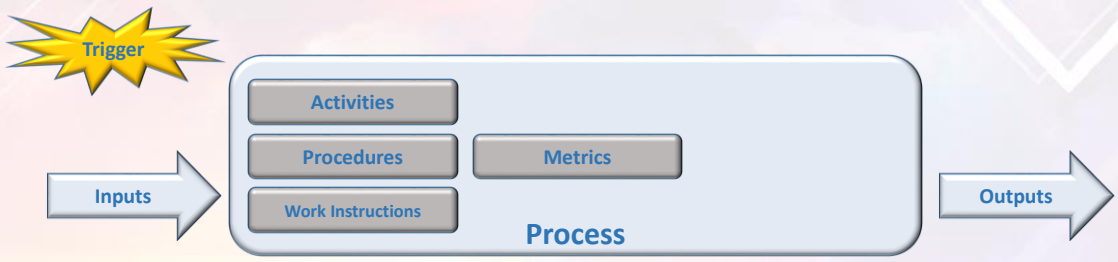

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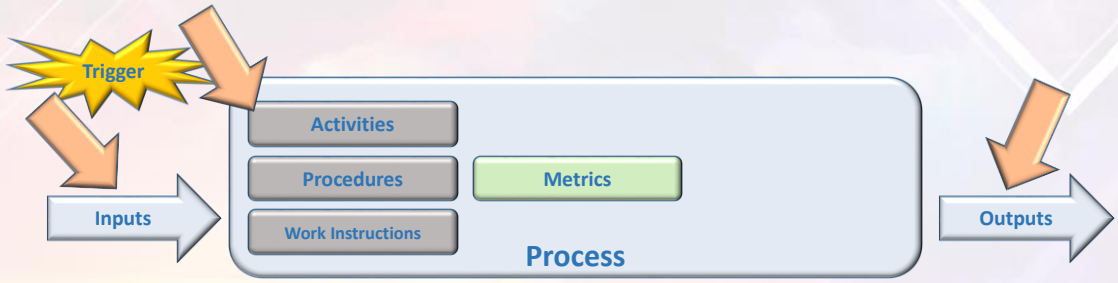
The Anatomy of a Process

Processes are Measurable



This is a characteristic (#3) of ALL processes!

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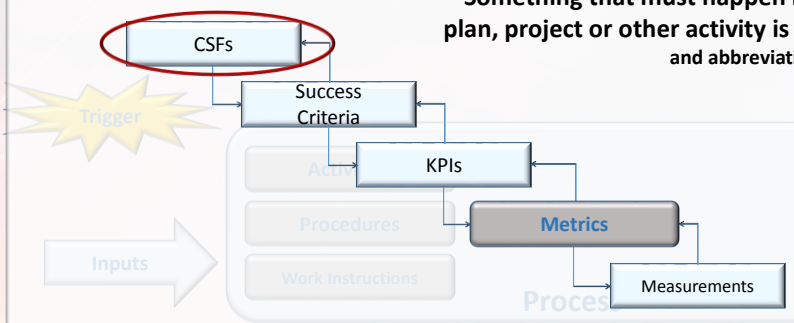

"Something that must happen if an IT service, process, plan, project or other activity is to succeed." (ITIL® glossary and abbreviations)

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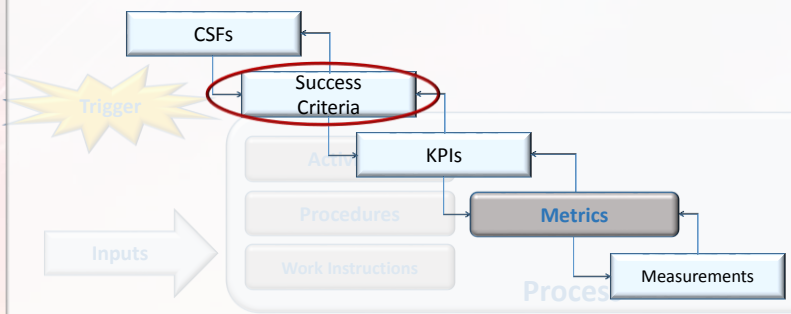
The Anatomy of a Process



"The outcomes of a process that are needed to consider the process a success. Success criteria are defined with the objectives and may be *quantified* by KPIs." (Wikipedia)

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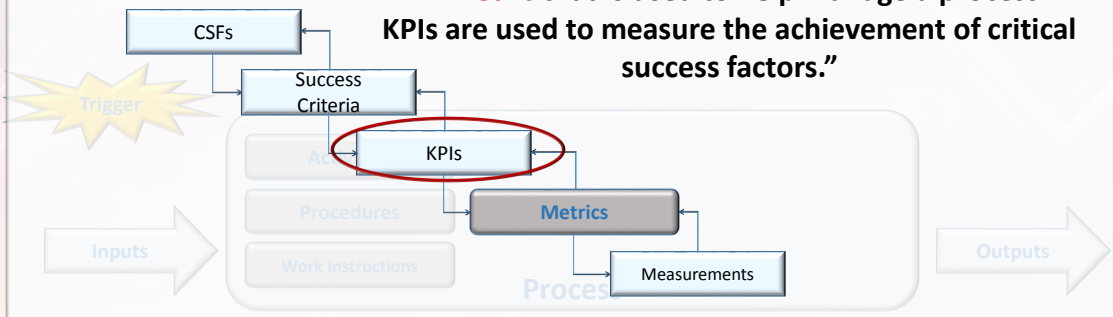
The Anatomy of a Process

"A metric that is used to help manage a process. KPIs are used to measure the achievement of critical success factors."



"Many metrics may be measured, but only the most important of these are defined as key performance indicators and used to actively manage and report on the process." (ITIL® glossary and abbreviations)

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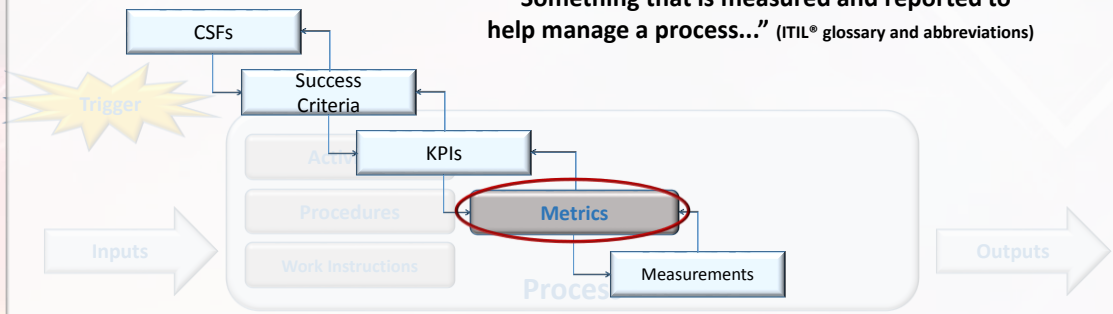
The Anatomy of a Process

"Something that is measured and reported to help manage a process..." (ITIL® glossary and abbreviations)



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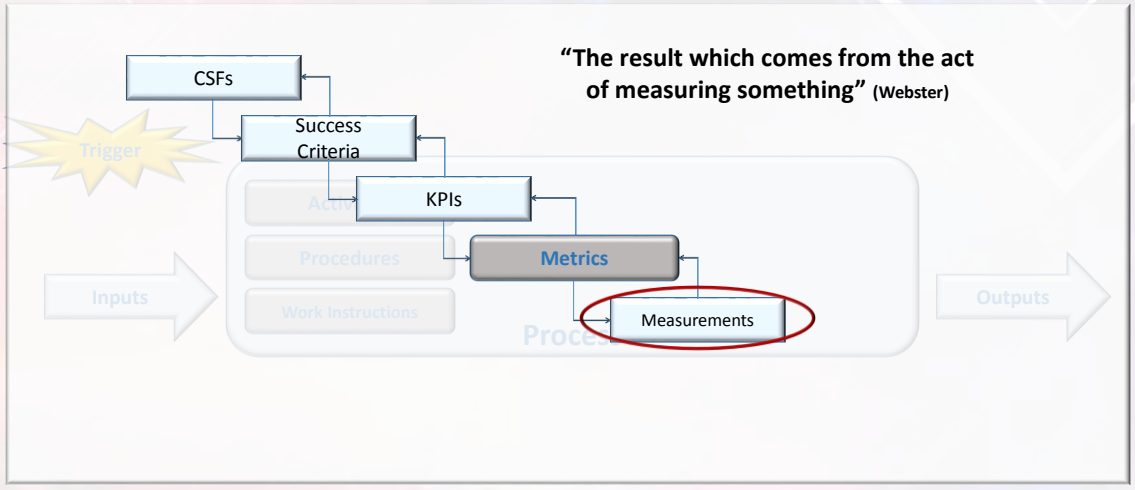

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The Anatomy of a Process

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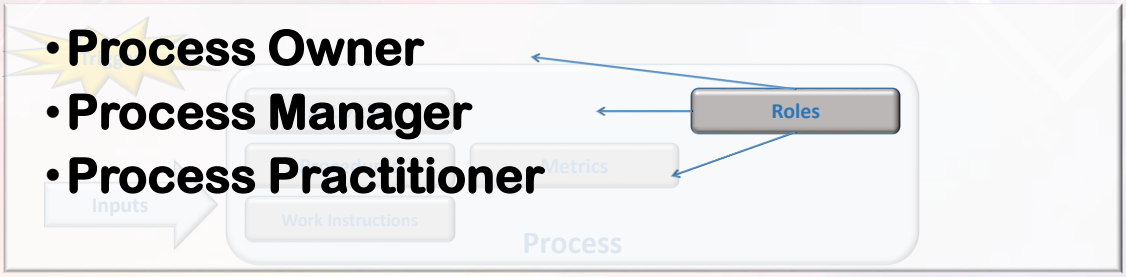
The Anatomy of a Process

- Process Owner
- Process Manager
- Process Practitioner



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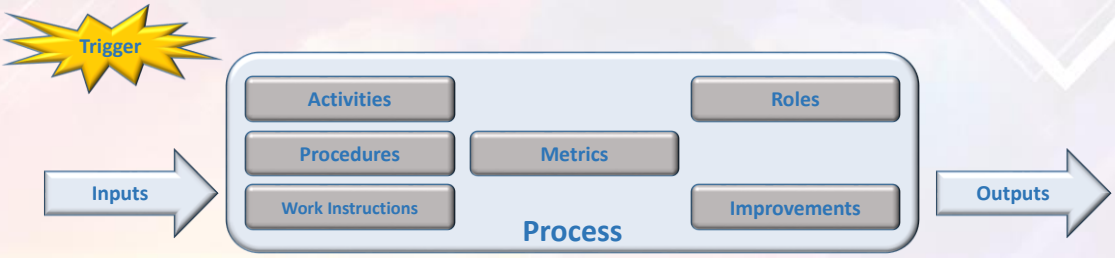

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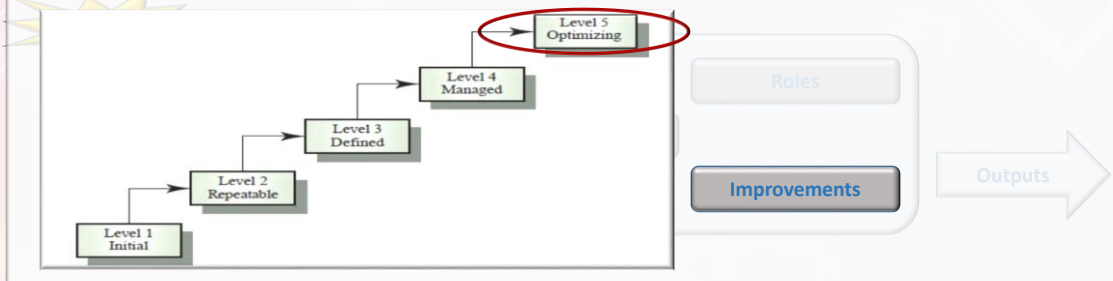
The Anatomy of a Process

Why?

- We want to provide better services (quality, cost, alignment)
- We may not know how - or have the capability - to measure the service directly
- So, we improve the processes with the understanding that better processes lead to a better service



"Even GOOD processes can be improved!"

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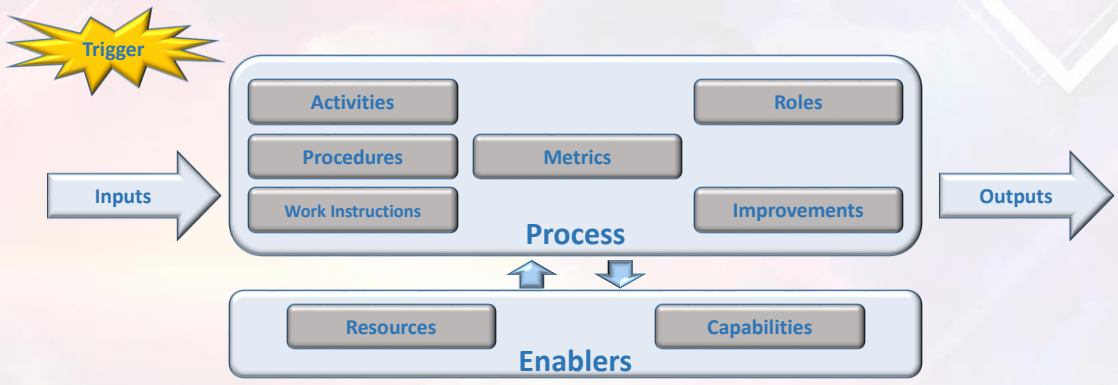
Questions?

The Anatomy of a Process



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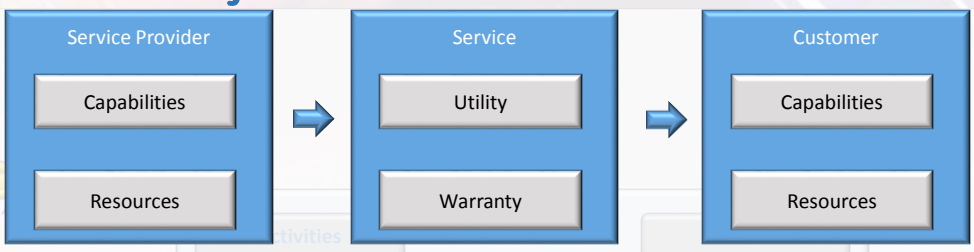

Capabilities – What we are able to do
Resources – What we use in order to do it

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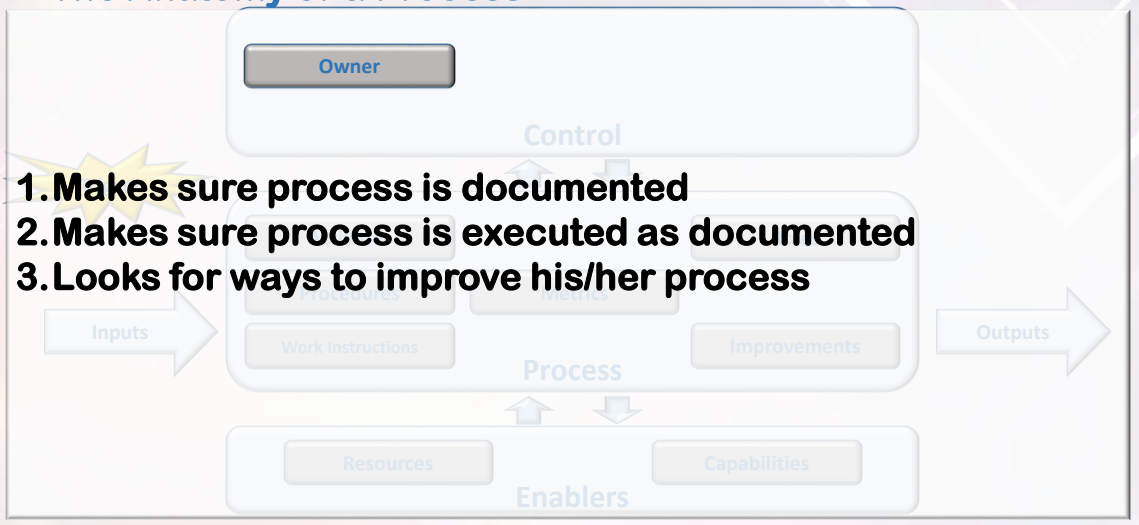

1. Makes sure process is documented
2. Makes sure process is executed as documented
3. Looks for ways to improve his/her process

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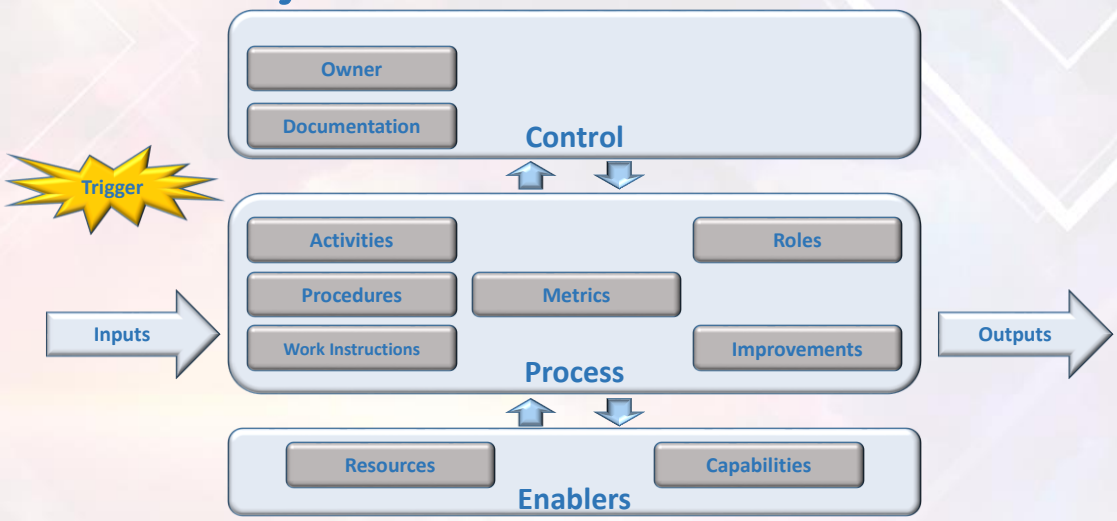

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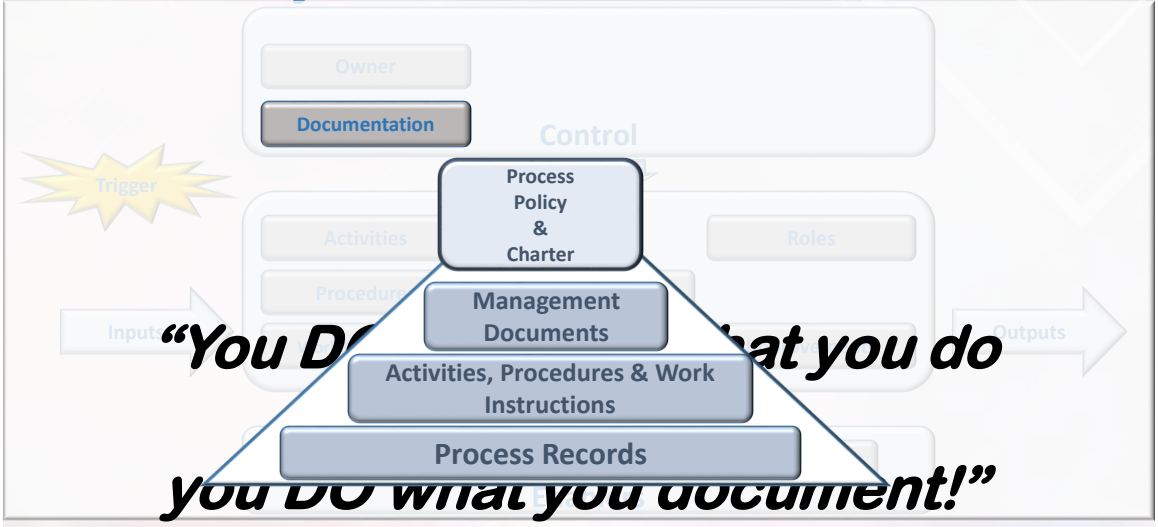

"You DO ... at you do you DO what you document!"

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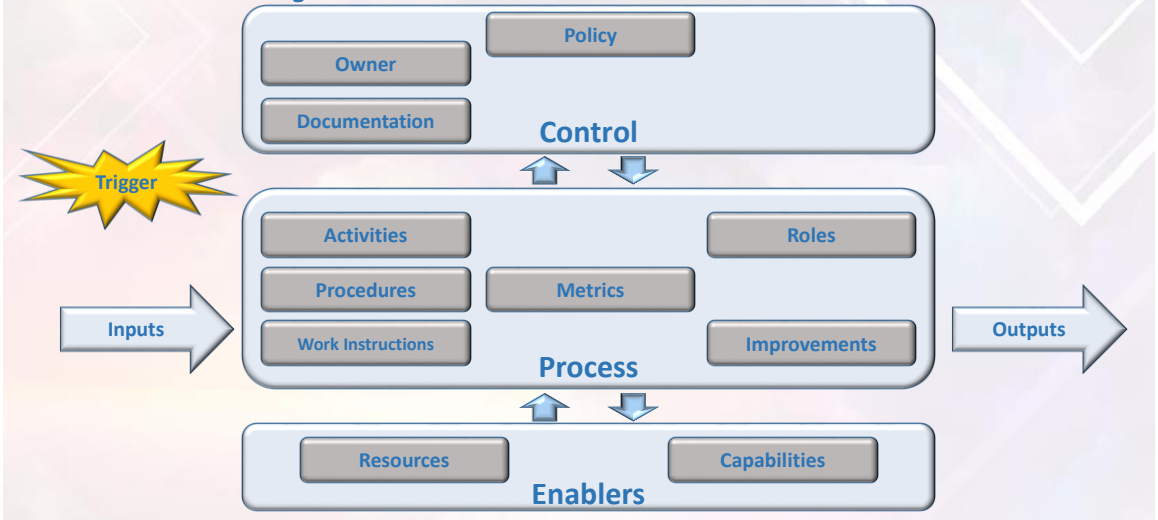

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The Anatomy of a Process

"Formally documented management expectations and intentions… used to direct decisions, and to ensure consistent and appropriate development and implementation of processes, standards, roles, activities, etc."

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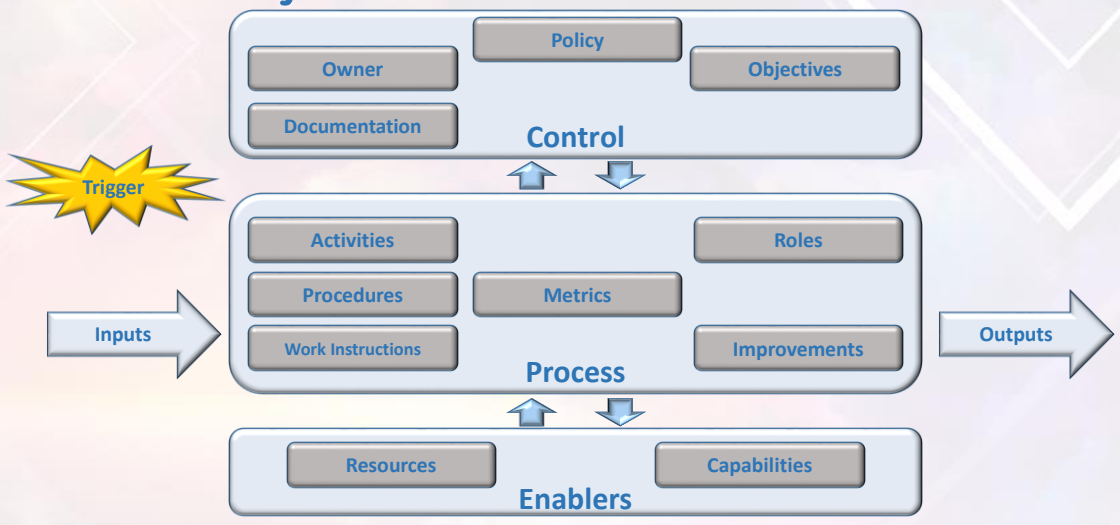

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The Anatomy of a Process

"The outcomes required from a process in order to ensure that its purpose will be fulfilled."

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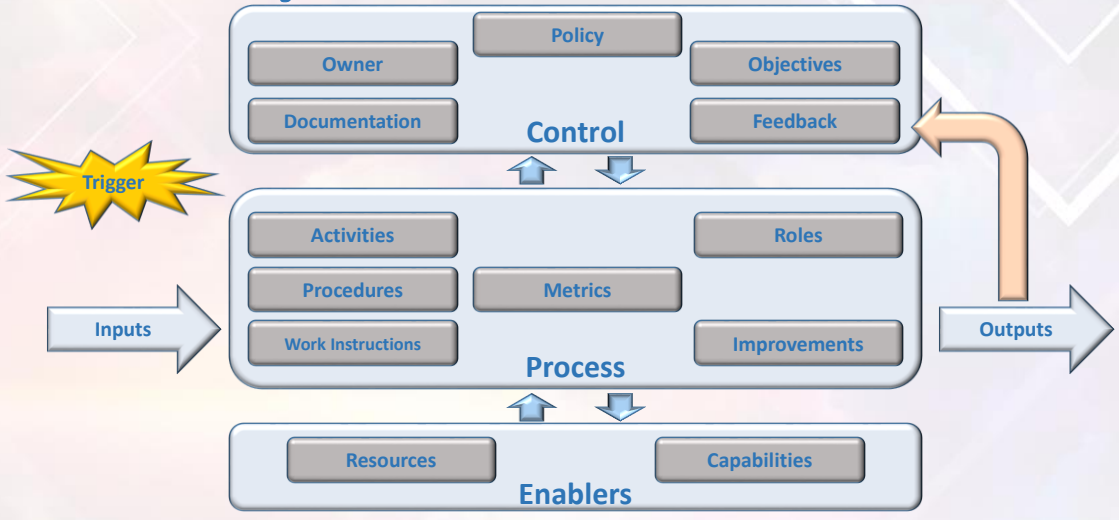

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The Anatomy of a Process

1. Email/Contact Forms
2. Surveys
3. Usability Tests
4. Exploratory Interviews
5. Social Listening
6. On-Site Activity (via Analytics)
7. Comment Boxes

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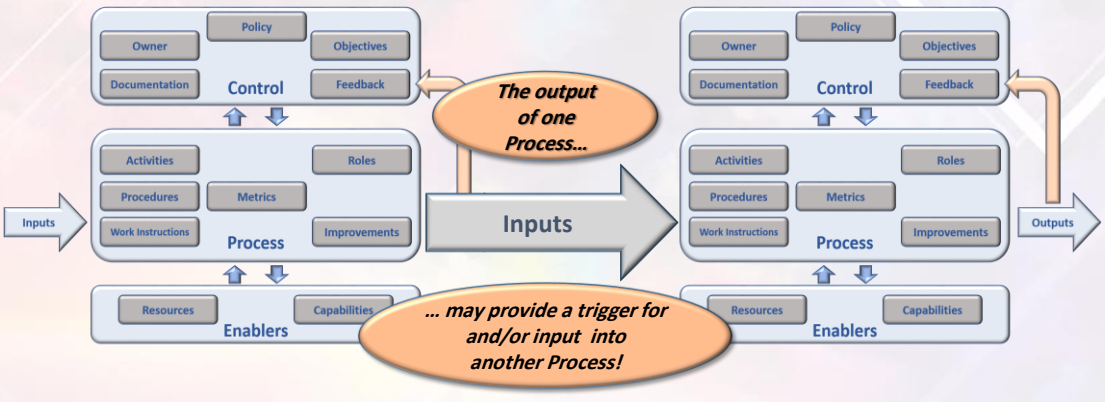
The Anatomy of a Process

A Process provides value to stakeholders



This is a characteristic (#4) of ALL processes!

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Summary of Process Characteristics

1. A Process is measurable
2. A Process delivers specific results
3. A Process provides value to stakeholders
4. A Process responds to specific triggers

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Questions?

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Process tools and technology.

- *Simplify the processes before automating them.*
- *Clarify activity flow, task allocation, information and interaction requirements.*
- *In self-service, reduce the contact users have with the underlying systems and processes.*
- *Don't rush to automate tasks and interactions that are neither simple nor routine*
- *Have a clear understanding of the output and purpose*

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Process tools and technology.

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Process tools and technology.

“Life is a process. We must learn how to crawl, then we can walk, before we can run.
Be patient.
It just takes time.

Cultural Integration – “It’s how we do things here!”

we are unaware of our
lack of ability or efficiency

Cultural Integration – “It’s how we do things here!”

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Cultural Integration – "It's how we do things here!"

Balanced Knot

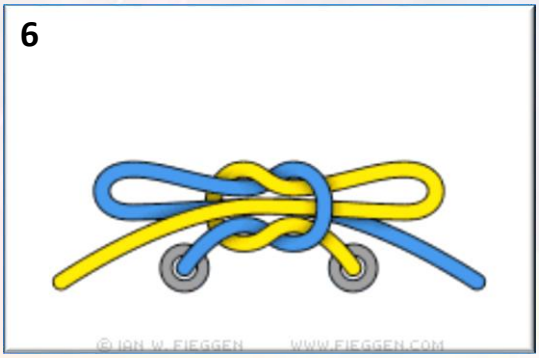
Un-balanced "Granny Knot"

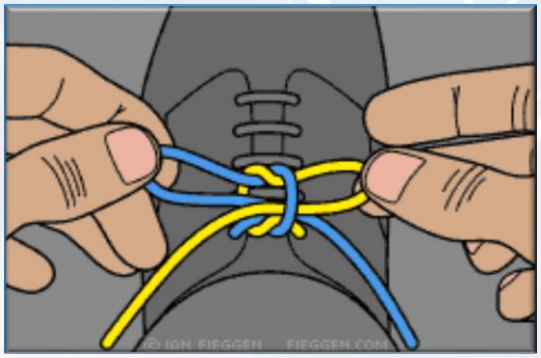
Remember: "Right over left, left over right makes a knot both tidy and tight."

Special Thanks to Ian Fieggen, aka "Professor Shoelace"

http://www.fieggen.com/ (Used with permission)

Cultural Integration – "It's how we do things here!"





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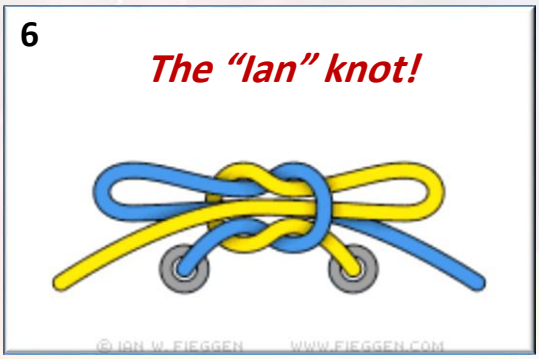

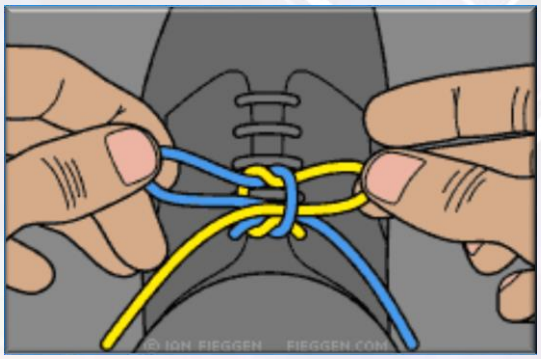

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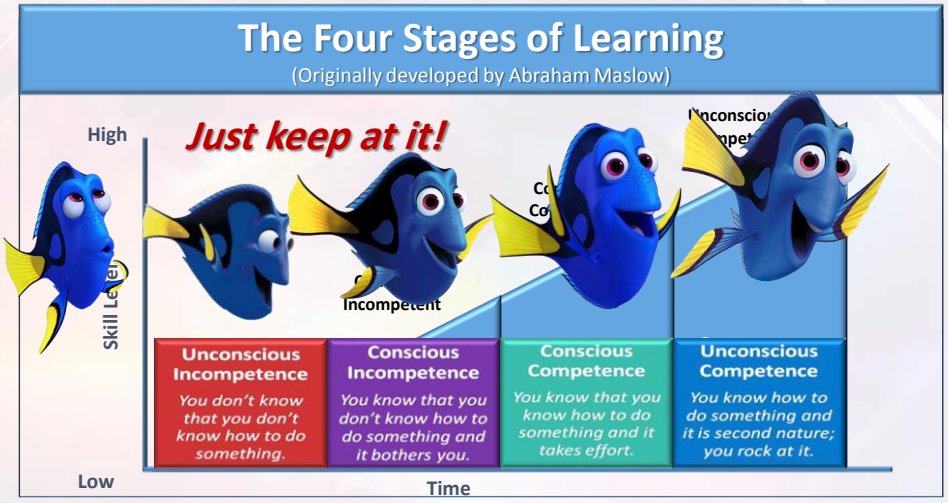

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Questions?

Summary

- Processes provide the building blocks to Service Management success
- Process outputs must be clearly understood
- Processes need to be defined and properly designed in adequate detail
- Processes need to be enabled via the necessary resources and capabilities
- Processes need to be managed and controlled
- Processes aren't implemented: they take time & attention!
- Even "good" processes can be improved!

“Life is a continuous process of adjustment.

- Indira Gandi

- Session 706 Presentation Process complete.
- Thank you for attending this session!
- Trigger “rousing applause” activity
- Audience response verified
- Evaluation process trigger:
  - *“Please remember to complete an evaluation form!”*

Safe travels home!

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