

Customer Focus in Process Improvement

by Ben B Graham

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A process is a series of steps completed to achieve a particular result. It is hard to imagine a process improvement effort that doesn't start with a focus on that result with a question like "What is the purpose of this process?" - whether the customer is actually engaged or not. Sometimes we have a strong sense that our product or service is good. Sometimes we choose to "get our own house in order" before we step outside the organization. Sometimes we base the result on a prescription provided by the customer. However, sometimes, our focus may be misdirected to how we do the work without considering why it is done in the first place...particularly where slick new technologies are involved. In any case, without actually engaging the customer, we can't really know how well the process is working to provide the customer with what the customer needs or wants. The following three cases show very different ways that customers influenced process design.

WHO IS the Customer?¹

In 1959, Hector Riquezes was working for Creole Petroleum in Venezuela where he charted a shipping process at the Caripito Terminal. When the team reviewed it, they quickly discovered that no one was using any of the information. The people who were doing the processing all knew what they were doing and how to do it, and the information they were processing was being dutifully filed. They had files going back many years. But no one was using any of it. At this point, Hector did what I recommend anyone should do under those circumstances. He dug into it to find out why the process was set up in the first place. (If you don't know what a thing is for, it is a little risky to get rid of it. But if you know what it used to be for and that reason no longer exists, you can confidently get rid of it.) Hector found out that the reason they were processing this data was to supply information for scheduling oil ships to rendezvous off of the island of Trinidad, form up into convoys and sail for Europe during World War II. This was 1959 and WWII had ended in 1945. So for 14 years, they had been processing paperwork that nobody was using! What do you think those people would have been doing with those records in 1960 if Hector had not done his project in 1959? How about 1961? When would it have ended?

A detailed process map clearly shows how each item in a process is used. In this case, each team member knew their own role in the process and knew that they weren't using the information. When they walked through the process (typically about a 5 minute effort), they soon realized that none of the other people involved in the process were using the information either. There was no customer for their product!

Development in the City of Dayton²

In 1998, we were invited to sit in on a Development Task Force. Business was leaving the city center and there had been no major new building there for decades. The task force was made up of key players in the city (builders, architects ...) who wanted to see this turned around. We soon found out that this was the third such task force formed. The others had met quite a few years previously, completed their deliberations, made their reports—and nothing had happened. We also learned that a number of the people on this task force had previously served on one or both of the previous two and they weren't particularly optimistic about things changing.

We offered to provide process focus by charting the building permits process and working with the people who did that processing to analyze and improve the process. We charted the process in one day, approximately 400 steps. At the next meeting of the task force, the charts were hanging on the wall.

The people on the task force arrived in the room, gravitated over to the charts and started reading them. They were impressed by the detail and the professional appearance of the charts, and then something special happened. The spirit in the room changed. There was a general feeling that they were going to do it this time. The task force came up with eight major recommendations.

An improvement team was formed, representing the different areas of building permit processing; building, zoning, engineering, fire, water, structural, housing and plumbing/heating/ electrical. The team members studied the charts and worked out how to accomplish each of the eight recommendations. Within a year the building permits people of the city moved into a one-stop shop, and in the following years, the city saw the building of a minor league ballpark, a new office building, a new performing arts center and a major park area along the Miami River, which runs through town.

With the first two efforts, the city went directly to the customer, collected good ideas but had no structure or method for incorporating them into the current processes. The third time worked because they had a detailed map of the current process and they were able to engineer the process to accommodate the customer recommendations.

Taking Process Analysis to the Customer

Steve Visio, president of Executive Data Control, Inc. (EDC) describes how his people took process improvement beyond the walls of EDC to help a customer with their requisition process.

“Six years ago we applied the Ben Graham Detail Process charting methodology to our internal processes. Specifically, we completed major improvement of the production of business cards in our print shop. We estimated a savings of 15 hours per week for the production team, significantly reduced errors and improved the production turn by 5 days. Based on that success we expanded the scope of the project to include the requisition of business cards at one of our largest clients.

We proposed to chart the entire requisition process from the client request all the way through production, shipment, receiving and payment for their business cards. The study consisted of building a team of key client employees involved with the process. We then conducted interviews, drew the charts and reviewed for accuracy. Then we conducted two process improvement meetings. The first meeting was with the human resources department responsible for procuring the business cards. Then we included the IT department who was responsible for the corporate intranet used to build the card orders online. The effort was a great success; we eliminated approx 150 emails per week, streamlined the process from 68 to 34 steps and removed the customer service department from touching the individual orders.

This past year the client made an acquisition that roughly doubled the size of what was already a two billion dollar organization. The client placed their business card requisition process out to bid nationally, including the legacy vendors of the newly acquired company. We were pleased to learn that we won the bid. The process we built through our joint analysis years ago continues to be “the one best way” to procure their business cards. In fact, the client made some changes to their intranet to connect directly into our internal process and completely eliminated several interim steps on their side of the process.

It is amazing how resilient work processes can become and the continued refinement that derives from teaching people to think process improvement. Thanks to the Ben Graham improvement methodology we have developed a customer focus that other companies just cannot seem to match. Forever people have talked about the importance of trusting relationships between businesses. Trust is something you earn and this methodology has been our means to earn trust based on consistently superior results. Many people make promises, few people deliver results. After many years experience with the Ben Graham methods I am very confident that together my clients and I can deliver sustained improvement, what more could a customer want? “

These three scenarios gave us a process without a customer, an improved process driven by customer recommendations and process improvement extended to the customer. Process analysis will help you do what you do better, when it includes engaging the customer, it will help you do better things.

Ben B Graham is President of The Ben Graham Corporation and author of the book 'Detail Process Charting: Speaking the Language of Process' published by John Wiley Publishers. His company pioneered the field of business process improvement, and has provided process improvement consulting, coaching and education services to organizations across North America since 1953. Ben has worked with many organizations to build libraries of business process maps and develop effective, process-focused, continuous improvement programs. His organization publishes Graham Process Mapping Software, which is designed specifically for preparing detail process maps. More information about the software is available at <http://www.processchart.com>

¹ Excerpted from the following book:

Ben B. Graham, *Detail Process Charting: Speaking the Language of Process* (Wiley, 2004), 172.

² Ibid., 171.