



## **Business Process Optimization: Discovery – Know Yourself**

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In the first article in this series, we discussed the importance of defining your overall BPO project and establishing the project team. This article looks at Discovery – the first step down the road toward optimized processes.

### ***Why Discover***

Before redesigning processes, it is important to understand your current environment so that the end-state meets your needs. Discovery provides that understanding – what is unique about your organization, the issues you face, and the goals you have defined. Discovery establishes the context within which you define and understand your current processes.

### ***How to Discover***

Begin Discovery through team meetings to review the project process and discuss the goals of each stage. Clearly, a key aspect of Discovery is gathering and sharing information about your current situation. Team members will assemble and present the following information for the area(s) they represent:

- Overview of current operations, processes and technology
- System and process demonstrations
- Observe processes, if required for everyone to be fully informed
- Discuss strengths, weaknesses, and opportunities in each area

This exercise ensures that all team members fully understand the end-to-end process flow and how each area impacts other areas. In addition, the team needs to get up to speed on best practices and enabling technology for each area under review. Be sure to assign responsibility for research and reporting to the entire team and assign due dates.

The final step in Discovery is to revisit the project definition and scope now that all team members have the information they need. Use standard one-dimensional flow charts to define the high level call center functions with basic links to other departments. These charts help define the scope of the current project and identify “touch points” into processes for which others are responsible. Use tools such as Responsible, Accountable, Consulted, Informed (RACI) tables to explore links to other areas and ensure those stakeholders are at the table. Finally, use multi-tiered, swim-lane charts to document processes when required.

As you conclude Discovery, you should have a clear understanding of your current processes such that they support documentation of the fully optimized “to-be” processes in a later stage of the project.

### ***Successful Discovery***

Here are some critical success factors to keep in mind as you “Discover” your current operations:

- Expand Discovery beyond your own four walls – research benchmarking and best practices within and outside your industry to fully understand what is possible.
- Explore how state of the art technology might enable your process vision



- Don't spend time blindly following unnecessary steps. You need only understand your "as-is" environment and processes sufficiently to move forward. Don't get bogged down in detailed "as-is" process mapping unless it has a material impact on process redesign.
- Record baseline metrics to ensure you can measure the results of process redesign when the project is complete.

In the next article, we'll look at the second stage of a BPO project – Assess and Analyze – and how it builds on Discovery, moving one step closer to successful process optimization.