



3 Three Steps to Streamline Your Processes

Improve your processes with these steps.

By Tim Wacker

Here's a thought: Your staff doesn't have to do *everything* to get everything done.

You can streamline common management activities, especially those that are paper intensive, by using digitization and automation. For example, consider automating such processes as:

- accounts payable
- application submission and processing
- case/client management
- compliance with legal and tax regulations
- grant management
- hiring
- records management.

Here are the three steps to optimize such processes and enhance efficiency, accuracy, and cost-savings:

“Clinging to the status quo is an imbedded human trait.”

1. Diagram Existing Processes

The first step is to list the key components of the process you want to improve. These should be fundamental, unchangeable aspects of the process. For example, to identify key components of your grant management process, consider these questions and answers:

Q: What is the goal or desired outcome of this process?

A: To gain funding.

Q: When does the process begin and end?

A: It begins when someone starts the grant proposal application and ends with the announcement of an offer or rejection.

Q: What activities move the process forward?

A: Information gathering, proposal writing, cover-letter writing, internal reviews, and submission.

Q: What employees and departments are involved?

A: Executives, finance department, project manager, and grant writer.

Q: What information is being transferred between steps?

Financial information, project strategies, proposal, and application review notes.

Answering questions such as these should provide you with enough information to map out or diagram an existing process. This will allow your team to visualize automation opportunities. An effective diagram of a process shows the initial task that starts the process, the final result, and every step between. Figure 1 is a diagram of a simple grant application process.

Ideally, diagramming a process and planning for improvements should include input from everyone involved with that process so no detail is left out.

Diagramming a process helps you do the following:

Audit your processes, and remove any unnecessary steps.

Look at the big picture, and account for all types of potential scenarios.

Gather the requirements you need to make improvements.

Produce a visual aid that everyone can agree on – ensuring that everyone is on the same page.

Reduce upfront errors, and prevent unnecessary changes down the road.

Once you’ve diagrammed your process, you’ll have a better understanding of how to improve it.

2. Identify and Alleviate Pain Points

A good example of how to identify your pain points is provided by a community action group in Minnesota. The organization provides energy assistance to low-income families.

The organization’s leadership team began by analyzing its grant application process. It discovered that bottlenecks stemmed from filing paper documents, storing them, and finding them later. In other words, managing paper was its major pain point.

Next the team analyzed the tasks involved in processing client requests for home-energy assistance. Again, it found that keeping track of paper records was the organization’s pain point.

To address these problems, the team researched digital document management systems and decided to purchase Laserfiche. The resulting automated system allowed the organization to:

Streamline the approval process by automatically routing applications to the designated staff member.

Sort incoming documents much faster to determine grant amounts as soon as possible.

Respond immediately to client inquiries by allowing staff members to retrieve applications from a computer instead of searching through 30 extra-deep, four-drawer filing cabinets.

Easily comply with state-regulated record-keeping standards.

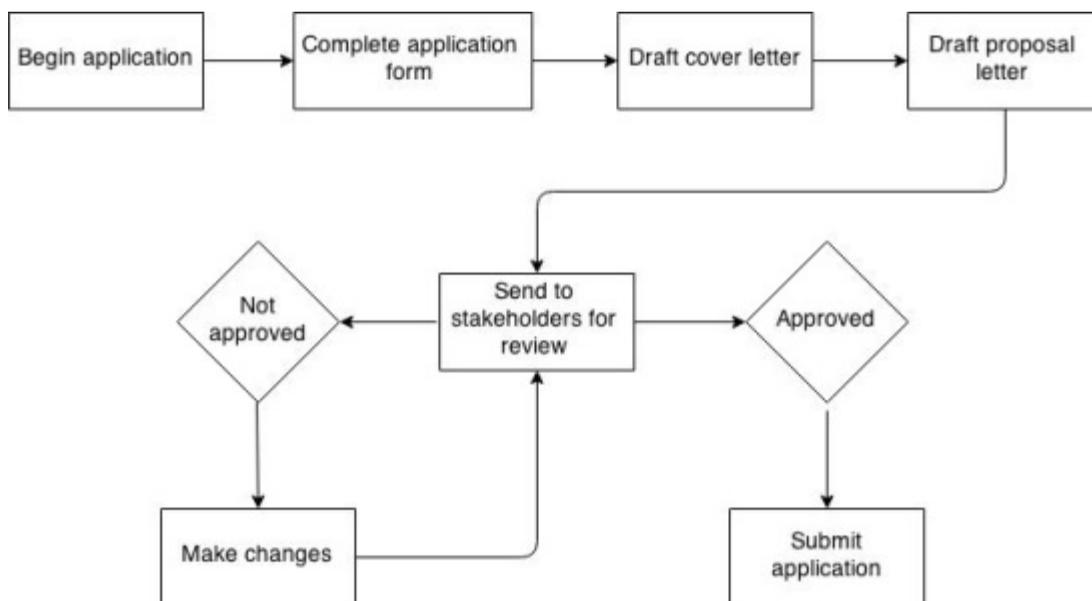
Allow for secure passage of confidential records over the internet.

Automatically create folders to consolidate applications, worksheets, and case note logs.

Assure greater accuracy. Handling records often leads to mishandling them. The same applies to making numerous copies of one file. By eliminating all that, automation decreases errors.

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FIGURE 1: EXAMPLE OF HOW TO DIAGRAM YOUR GRANT APPLICATION PROCESS



Accelerate the ability to help households in need. What once took days now takes hours. When clients are faced with having their heat or lights shut off for nonpayment of utility bills, the increased efficiency can save much more than time.

Archive files using an automated indexing module.

Let staff work from home or mobile devices by accessing records through a password secured portal via the internet.

Prepare for biannual audits easily and quickly.

Protect sensitive information while making processes more efficient.

Resolve emergencies instantly. The new software can communicate the status of files immediately – a big help to people in crisis situations.

3. Change the Culture

Unless employees are experiencing discomfort with inefficient processes, they most likely won't respond favorably to change from the start. Even if they're unhappy with current processes, they aren't apt to be enthusiastic about change. Clinging to the status quo is an imbedded human trait.

“Research shows that nearly 75% of all organizational change programs fail, not because leadership did not adequately address infrastructure, process, or IT issues, but because they did not create the necessary groundswell of support among employees.”

– Mark J. Dawson and Mark L. Jones, PricewaterhouseCoopers, “Human Change Management: Herding Cats”

To make change successful, recognize the importance of your organization's culture *before* you make major changes. Take these steps to be sure your culture is one that accepts change:

Use mistakes and errors as learning opportunities. Encourage people to bring problems into the light and deal with them rather than worry about losing face or being reprimanded.

Actively urge people to provide their input. Follow up on their suggestions.

Be sure that everyone who will be affected by a change is involved in discussions and decisions from the very beginning.

Align people's daily activities with your organization's values.

“Allow for secure passage of records over the internet.”

Be an advocate for change. People will follow what the organization's leaders do.

Never try to force change on people. You will only meet defiance. Find ways to enlist staff members as allies in overcoming the natural resistance to change. Help them see how the change will improve their lives in the long run.

During any change process, schedule regular group meetings to let employees air their worries and discuss ways to make the transition easier.

Seize the Opportunity to Improve Efficiency

Optimizing your processes through digitization and automation requires more effort than simply purchasing software. Needs change over time, so an improved or automated process that works well this year might not be as efficient two years from now.

Revisit your processes on a regular basis. Each time you do so, work through the three crucial steps: Analyze existing processes, identify key pain points, and ensure that staff members are on board with the change.

And remember, perfection isn't a goal – it's a process. 

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Making It Work

For more on transforming your organization's processes, see these articles at NonprofitWorld.org:

Creating a Values-Based Road Map (Vol. 23, No. 2)

How to Change the World by Changing Your Culture (Vol. 31, No. 2)

The Purposeful Techie: Nonprofit IT with Intention (Vol. 31, No. 4)

Why Feedback Is the Key to Your Success (Vol. 35, No. 3)

The Promise and Pitfalls of Organizational Change (Vol. 28, No. 4)

Grounded Visioning: A Quick Way to Create Shared Visions (Vol. 26, No. 4)

Overcome People's Resistance with These Steps (Vol. 38, No. 3)

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