Think Process, Not Function

Wednesday, January 20, 2016 | 3:30PM – 5:00PM

PRESENTED BY:
Jim Lara & Steve Brechter
Gray Stone Advisors
Think Process, Not Function

Agenda

• What is a Process?
• Why Document Processes?
• Types of Processes
• How Processes are Documented
• Document Management System (DMS)
• Process Optimization
• Discussion
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Agenda
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What is a Process?

• Definition of Process
  • ‘A Series of Steps that Produces a Desired Outcome’

• Process Flow Mapping
  • Depicts Natural Process Groupings
  • Different from Process Flow Diagrams
  • Sequence is of Secondary Importance
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Why Document Processes?

• Improved Client Service Levels
  • Eliminates ‘Hit or Miss’ Uncertainty
  • Repeatable Results
  • No ‘Firefighting, High Drama or Heroics’
  • Smooth Operation ‘Behind the Curtain’ Creates Better Service ‘In Front’

• Reduced Operating Costs
  • ‘Word of Mouth’ is No Longer Effective
  • ‘First-Time Quality’ is Key for Operational Scalability
  • Rework, Duplication of Effort and ‘Quality Escapes’ are Eliminated
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Why Document Processes?

• Defines Baseline for Continuous Improvement
  • Clearly Establishes the ‘Current State’
  • Incorporates Process ‘Effectiveness Measures’
  • Enables Improvement Targets & Objective Measurement of Progress

• Creates Greater Alignment
  • Defines ‘How’ Things Get Done and by Whom
  • Eases Interface Within and Between Functional Groups
  • Increases Consistency of Deliverables (Internal and External)
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Why Document Processes?

• Generates Organizational Bandwidth
  • Increases Predictability of Outcomes
  • Frees Employees to Move Beyond Maintaining the Status Quo
  • Allows Focus on ‘What’s Really Important’ & Driving Business Forward
• Provides Business Continuity Safeguards
  • Avoids the ‘Critical Person Syndrome’
  • Backups & Job Mobility are Available when Needed
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Why Document Processes?

• Creates Employee Development Opportunities
  • Enables Process Ownership & an Empowered Organization
  • Growth Opportunities linked to Individual Development Plans (IDP)
• Elevates Employee Commitment & Engagement
  • All Processes are Fully-Defined & Clearly ‘Owned’
  • All Employees Able to Examine & Challenge the Status Quo
  • Opportunities for Improvement Become Easy to See
  • Work Discussions Become ‘Objective’ vs. ‘Subjective’
  • More Engaged, Committed & Productive Workforce
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Why Document Processes?

• Most Flight Department Processes Remain Untouched by IS-BAO
  • IS-BAO is Flight Operations-Centric
  • Touches Approximately 30-40% of all Department Processes
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Types of Processes

- Repeatable (Good)
  - Delivers Consistent Results & Outcomes by Themselves
  - ‘Who is Conducting Them’ Becomes Irrelevant
- Relationship-Based (Bad)
  - Requires Human Intervention to Produce the Desired Result
  - ‘How to’ Can be a Closely Guarded Secret (like Col. Sanders’ Recipe)
  - ‘Critical Person Syndrome’ Can Paralyze the Organization
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Business Aviation Process System

- Flat
- Lean
- Simple
- QMS-Based

Single Point of Entry
Top Level Document (Overview & Pointer)
Defines ‘What is Done’
Defines ‘How it’s Done’
‘Controlled Documents & Forms’ (Includes FOM, SOPs, etc.)
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How Processes are Documented

• Think ‘Process,’ not ‘Function’
  • ‘Natural Process Grouping’ vs. ‘Random Assignment’
• Think ‘Horizontal,’ not ‘Vertical’
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How Processes are Documented

- Establish the **Operating System Document**
- Identify, Document & Map the **Core Processes**
  - ‘What is Done’ by Each Functional Group
- Identify the Necessary **Operating Processes**
  - ‘How the Jobs Get Done’ in Each Functional Group
- Develop Electronic **Document Management System**
  - Appoint a Document Administrator
- Optimize
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How Processes are Documented

• Establish the Operating System Document
  • Point of Entry for Access to all Processes throughout the Entire Organization
  • Serves as the ‘Pointer Document’ to Implementation of all Requirements
  • Describes ‘How the Organization is Run’
  • Accomplished as Final Step
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How Processes are Documented

- **Establish the Core Process Documents**
  - Defines Key Processes By Major Functional Area
  - Establishes the ‘Current State’ of ‘Who Does What’
- **Applies a Uniform Template for all Processes in the Department**
  - Process Flow Map
  - Brief Narrative
  - Identification of Process Owner
  - Effectiveness Measures
  - Detailed Process Description
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How Processes are Documented

• Core Process Document Flow Mapping
  • Flow-Maps are Linear, but Not Always Sequential
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How Processes are Documented

- Example of a Core Process Document

1.5.2 Flight Request Review & Assessment

a. Travel on all (XX) Aviation flights shall be conducted in accordance with the (XX) Corporate Aircraft Utilization Policy.
b. All Flight Requests shall be reviewed and assessed by Scheduling & Dispatch.
c. Scheduling & Dispatch shall determine aircraft availability in conjunction with the Chief of Maintenance and Vice President of (XX) Aviation.
d. Each Flight Request shall be evaluated to assure that it meets the requirements established by (XX) Aviation for safe operations in conjunction with the Flight Operations Manual (FOM) with specific focus on aircraft and crew operating constraints.
e. Necessary approvals for use (business or personal) are the responsibility of the requesting EC Member and shall be obtained prior to the scheduled departure of the flight.
   i. An aircraft may be placed on "hold" pending receipt of such approval.
f. Scheduling & Dispatch shall combine and optimize Flight Requests and fleet schedules to offer safe and efficient travel solutions.
g. (XX) Aviation utilizes a Wait List for trips that cannot be accommodated on the corporate fleet.
   i. If an aircraft or crew is not available to fulfill a request, the Requester shall be advised.
   ii. Scheduling & Dispatch shall maintain the Wait List as necessary and contact the EC Requestor in the event that an aircraft becomes available.
   iii. Use of a Wait List allows Scheduling & Dispatch to manage logistics and respond to EC flight requests in a responsive manner.
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How Processes are Documented

- Once Core Processes are Documented:
  - Everyone is ‘On the Same Page’
  - Process Ownership is Clearly Established
  - Roles & Responsibilities are Universally Understood
  - Processes are Measured for Effectiveness
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How Processes are Documented

• Establish the Operating Process Documents
  • Developed on an ‘As-Needed, Exception-Basis’ Only
  • Prepared Only for Those Processes Needing Detailed Definition
  • Explains Precisely ‘How the Work Gets Done’
  • Similar to SOPs
• ‘You or I’ Should be Able to do the Job
• Hyperlinked From the Core Process Document
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How Processes are Documented

• Example of an Operating Process Document

1.1 Process for Payment of Fuel Invoices

a. The fuel invoice shall be received at (XX) Payment Processing Center or OB10.
b. The Business Manager shall receive notification via email from the Payment Processing Center indicating that the invoice is available and ready for action:
   i. The Business Manager shall verify the Purchase Order number;
   ii. The Business Manager shall print a hard copy of the invoice.
c. On a weekly basis, Scheduling & Dispatch shall forward the original fuel uplift tickets to the Business Manager:
   i. Fuel Uplift tickets shall be sorted by tail number.
d. The invoice and uplift ticket shall be matched and verified by the Business Manager for:
   i. Tail number;
   ii. Quantity of fuel noted on uplift ticket vs. invoice;
   iii. FBO details;
   iv. Date of uplift;
   v. The Unit price shall be verified by the crew at the point of sale.
      • The fuel uplifts shall be signed by the crew and show the negotiated price per gallon.
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How Processes are Documented

• Once Operating Processes are Documented…
  • Everyone Understands ‘How Tasks are Done’
  • ‘Critical Person Syndrome’ is Avoided
  • Team Members Readily Able to ‘Backfill’
  • Department Flexibility is Increased
  • Work Life Balance is Enhanced
  • Overtime is Reduced
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Document Management System (DMS)

- Process Documents Should Reside Electronically
- Process Documents Should be Accessible to Everyone
- Document Administrator Should be Appointed
  - Document Oversight & Revision
- Appropriate Levels of Access Required
  - ‘Read’ & ‘Edit’ Capabilities
- Hard Copies Marked ‘Reference Only’
  - Watermarked Across Each Page
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Document Management System (DMS)

- Process Documentation Simplifies the Operation
- Provides Single Point of Access to all Documentation
- No More ‘Critical Person Syndrome’
- No ‘Parallel Systems’ in Use
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Process Optimization

• Documented Processes Enable an Objective Look at ‘What Is’
  • Improvement Opportunities Become Evident
• Process Changes Can be Made to:
  • Increase Efficiency
  • Lower Cost
  • Create Bandwidth
  • Increase Client Satisfaction
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Discussion