

Achieving Predictable Results through Repeatable Processes

— Bobbi Stark, PMP, Principal of [Integral Process Solutions](#)

Doing things more than once does not necessarily equate to a repeatable process with a predictable outcome. The definition of a repeatable process is the ability to perform an action or produce an outcome virtually an infinite number of times with a predictable level of quality. In order to accomplish this, it makes sense that the process is well documented so that individuals using it can obtain the same predictable results over and over again.

Although I have spent a majority of my professional career promoting and driving organizational change around process-related improvements, I have never been more of a fan of repeatable process than I was this fall. To give you a little background, my daughter is in her 2nd year of high school dance competition. During the summer (months before the dance season was to begin), I accepted the role as President of the Booster Club for the Dance Team. This seemed very manageable at the time. The Booster Club not only supports fund raising, but is also responsible for planning and staffing all the activities required to host a home school Meet. As luck would have it, the first Meet of the season was hosted at my daughter's school. I was now feeling very overwhelmed with what lay ahead.

In an act of desperation, I reached out to the past President. She had been President for the previous 3 years. I asked her how she planned for such a large event and how she knew she was covering everything that needed to be done. She showed me a planning tool that she used. It had all the required roles that needed to be staffed, the times they were needed, how many people were needed for each position, and an explanation on what they had to do. I was blown away! She also had a pre-event planning list that provided, in chronological order, all the pre-event activities that needed to be done and ready to go for the Meet to run smoothly. Having this information made me feel much more at ease, and provided a way for presenting needed information to the Booster Club members so they could sign-up to support the event. We were able to plan for the Meet, obtain staffing and materials, execute the event, and overall it was a huge success! All this project management was transparent to our dancers, which allowed them to focus on their routines and not worry about how well their school was being represented in the competition.

I was extremely grateful for the documented process that the past President provided. Without it, the entire Meet would have been at risk. After the event, the Booster Club members submitted suggestions as we went through our first round of process improvements, that will leave us better situated for hosting next year's competition.

Running projects in a business setting is no different. The value of having repeatable processes, especially in the project management (PM) arena is huge. There are some very simple things that can be done to help PM's be more effective and allow them to produce predictable results. Luckily, there is a plethora of free PM tools and tips on the internet that can help establish a process baseline. It is best to start small with this effort (one project or a small group of PMs) and improve over time. Below are some very basic things that can be done to develop your initial set of PM process artifacts:



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1. **Plan and Estimate Process Definition Activities**

First you will need a PM subject matter expert (SME) that is willing to drive the effort and do the initial work to define the necessary process artifacts. The appointed SME should be a process-minded individual that is well respected in the organization and can do some high-level planning and estimating based on the deliverables defined in the steps below. The table below provides a general guide for estimating the process definition work.

Estimating Process Definition Effort	
Process Artifact	Approximate Estimate.
Process Diagram	4-6 hours
Major Deliverable	4-8 hours
Procedures	8-12 hours
<i>Note: Reviews are helpful for providing input and obtaining buy-in – you will want to consider adding another 20% for each artifact to do reviews.</i>	

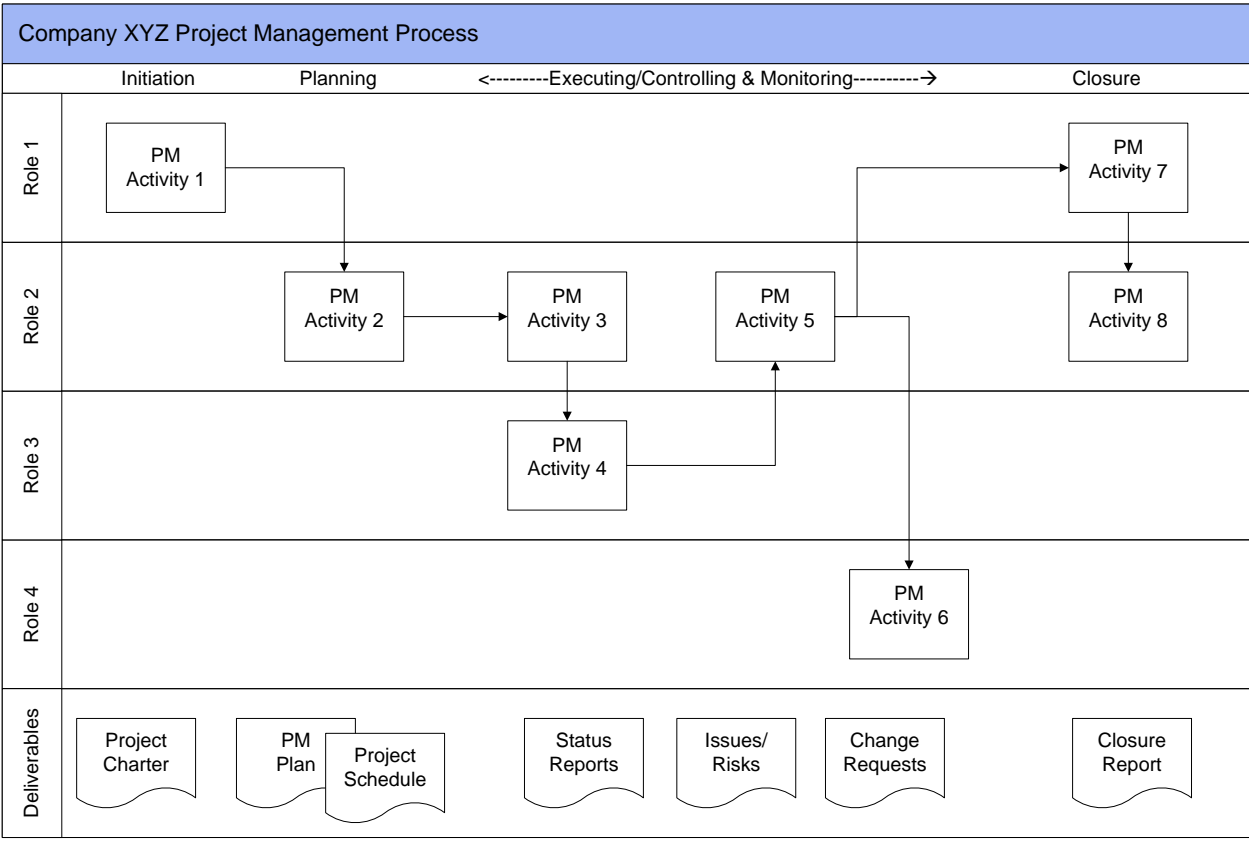
2. **Obtain Approval**

Based on the plans and estimates established in the previous step, you will need to obtain approval or at least a ‘go ahead’ from a more senior manager. This step is important because the more management support you have, the more successful you will be when it comes time to implement the new process.

3. **Define Process Flow**

Start with defining a high-level process flow that encompasses PM activities from beginning to end. The Phases of the PM processes could follow PMI’s phases (Initiation, Planning, Executing/Monitoring & Controlling, and Closure), or they can be customized to your organization’s terminology. Swimlanes are an effective tool for process diagrams and can quickly convey a large amount of information. Roles are described on the left side of the diagram (each having their own swimlane). Activities flow to the right and reside in the lane for the primary owner of the activity. Finally, a lane at the bottom of the diagram can show the major deliverables under the activity (or activities) that produce them. The diagram will provide all the project stakeholders with a quick-reference view of the established process and expected deliverables.





Note: A good rule of thumb when creating diagrams is to keep activities to 7 (+ or - 2). This will keep the diagram at a level that will be easily understood. If necessary, additional detail can be explained via a procedure.

4. Define Templates and Procedures

Define skeleton templates for each of the major documents identified in the process. Best practices can be obtained via searches on the internet. It is best to keep template and procedures definitions simple. Also, ensure that you are using your company’s terminology so that it will be more easily adaptable by PMs in your organization.

Assess the need for procedures: If you have activities or deliverables that may need more elaboration, you may create a procedure that provides specific instructions on how to accomplish that work. You can do this by creating a Step/Action table to define what steps need to be completed and who needs to do them. Below is an example of a Step/Action Table for a Change Control Procedure.



Example Step Action Table		
Step	Action	Role
1	Create a Change Request record in the CR Database and fill in the required fields.	Submitter
2	Description: Describe the change being requested.	Submitter
3	Impact: Identify all impacts to project-related work that this change will affect.	Submitter
4	Estimate: Provide an initial estimate for addressing the change.	Submitter
5	Hit the submit key for review by the PM.	Submitter
6	Assess initial feasibility of submitted change request.	PM
7	If feasible, assign for further analysis.	PM
8	

5. **Review the Process**

Review your process deliverables with a few key PM resources and obtain feedback. Ensure that you set the stage for these reviews — the process is evolving, the first release covers basic PM functions, and more mature activities and procedures can be added over time.

6. **Pilot the Process**

Find one or two projects to pilot the defined process and templates. Provide some basic training by walking through the process and reviewing required deliverables. Make sure that the PM plans a little extra time in each project phase as a learning curve for the new templates. Also plan time at the end of the project to assess how well the process and templates worked. Once the pilot is complete, implement improvement suggestions as appropriate before rolling out to a broader audience.

7. **Continually Improve the Process**

Provide a file folder or repository where you can keep suggestions for improvements as they are submitted. Establish a small group of PMs to meet on a periodic basis (monthly or quarterly) to assess the suggestions and decide what improvements should be made to continually improve the process. Make changes as resources and time permits.

Over time, the process will become second nature to the PMs, and listening to feedback will establish a sense of ownership in the end result. As new PMs come-on-board, the existing PMs will have a documented repeatable process that can quickly get them get up to speed and operating in an effective manner. Just like the process for planning and executing a Dance Meet; the PMs may not be dancing in the halls, but they will be grateful for having a solid baseline from which they can produce predictable results.

