Applying Lean Principles to Your **Business Processes**
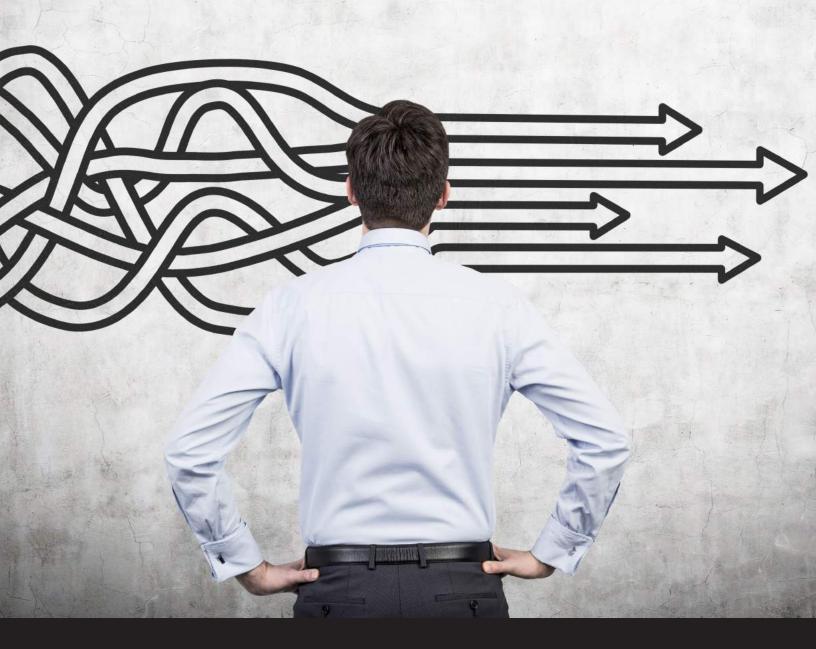
6 Simple Steps to More Business Insight, Control and Efficiency

▪▪ TRACKVIA®

The term "Lean Process" just sounds good, doesn't it? Who doesn't want to operate her business, her department or her day-to-day work faster, easier and more efficiently?

The truth is that most organizations—large and small—follow business and operational processes or workflows that are disorganized, disconnected and chaotic. Documentation is inaccurate or incomplete. Coordination and collaboration between groups or people is disjointed or disconnected. Critical tasks or assignments get skipped, overlooked or delayed. If you're like most people, you can't help but wonder, "Isn't there a better way to do this stuff?"

Of course, no one sets out to design a process or workflow that's chaotic or inefficient. In fact, the whole purpose of putting a process together in the first place is to simplify and streamline work. Make life easier. Produce better results. Gain more visibility and a greater sense of control. Complete work faster with less effort.

Why most business processes fail

Business processes generally fail for one of two reasons. One, the original process wasn't strategically thought through in advance. Instead, the process emerged as a result of things being cobbled together over time, usually by different people with different objectives and different perspectives. You wind up with a hodge-podge process made up of forms, spreadsheets, sticky notes and informal procedures that people "mostly" follow. These processes typically are not later changed because, with time, they simply become "the way that people have always done it".

The second reason processes fail is that they tend to break down over time. Add to this the fact that people generally accept the operational shortcomings of the status quo, because they become habit or simply, "the way that people have always done it". But the reality that processes need to be continually tweaked to evolve with your business remains. Consider why what you implemented originally may no longer work well today: The world has changed. Your business has changed. The tools or technology people use changes. People come and go. In fact, when you think about it, just about everything has changed, except the process itself.

The impact of poorly designed or deteriorating processes can have a dramatic impact on your business—and even your professional or personal mental well being. Bad processes can result in lost revenue, increased costs, poor employee morale, fines and penalties (in regulated industries), and in extreme cases, total business implosion. Don't believe us?

Read the great Harvard Business Review article, *Why Good Companies Go Bad*.[1]

Lean Principles to the rescue

This is how and why Lean Principles are so valuable. But what is Lean Process really?

We'll leave the precise definition to the experts at the Lean Enterprise Institute[2], but the basic philosophy surrounding the principles boils down to systematically finding ways to create more value for people (customers, employees, shareholders) with fewer resources (money or time) by improving the flow of work. Simply put, Lean comes down to continuously looking for ways to improve your business processes and do more with less.

Of course, there are books and classes and degrees and experts and consulting firms who make a full-time living off implementing Lean Principles. Implementing Lean Process improvement can become quite involved and complicated when it comes to large, complex situations that span entire organizations. But it doesn't have to always be large or complex. Often

> Incorporating Lean Principles **doesn't have to be involved and complicated**. It's better to start small with just one business-critical workflow.

times, it's actually better to start your Lean efforts off with a smaller-scale, yet still business-critical workflow. Improve this process, see the results and use them as a proof point for continuing to apply Lean Principles to other things.

In our experience helping thousands of businesses streamline their critical workflows, the vast majority of process or workflow improvement opportunities are generally straightforward and logical, and tend to involve or span across a few groups or departments.

How to get "Lean" in six steps

Regardless of size or complexity, the basic Lean Principles apply. If you have a process or workflow from which you want to gain control, visibility and efficiency from, consider applying these six Lean Principles:

1. Focus on your customer
Don't be confused by "customer". A customer doesn't have to be the person your company ultimately sells its product or service to. A customer can also be a boss, co-

---

[1]https://hbr.org/1999/07/why-good-companies-go-bad
[2]http://www.lean.org

By applying these six key Lean Principles, you can gain **greater control, visibility and efficiency** for your department or organization.

worker or internal group that your work serves. As an example, think of your human resource department's process to onboard new employees. The customer in this case is an employee. In this step, you simply want to get clarity on what your customer wants, and how you think you can provide it better, faster and at less cost.

2. Figure out how work actually gets done

The key word here is "actually". We all assume work gets done right or gets done a certain way. But reality is usually far from the truth. People side step processes, skip stuff, or put their own personal spin on things. Depending on how close you are to the actual work, it can be difficult to see. As such, a good tip is to ask a neutral person who knows nothing about your process to observe and record what they see in as much granular detail as possible. From there, ask them to provide you with their observations and any suggestions they may have right off the bat.

Six Steps to Becoming Lean

1 Focus on customers	2 Observe processes	3 Remove waste	4 Keep score	5 Empower people	6 Improve systematically

3. Remove wasted steps and inefficiencies

Did you know that many manufacturers literally count the physical steps that their production workers take between job stations? They do this because they know that eliminating a few simple feet of walking can have a significant impact on productivity. Apply the same scrutiny to your own process or workflow. What step or steps in the process can be removed, shortened or improved? Look for friction points. Is it a confusing question on a form, or perhaps software that takes too long to load? Where are errors occurring that produce waste or require rework? Finally, look for "still space" in your workflow where things get routinely held up (a.k.a. sit still) waiting for someone to take action or make a decision, like approvals. Can you remove or automate those things?

4. Keep score

We prefer to say "keeping score" versus "running analytics". The point is that you want to be able to tell whether something is working or not. All the analysis and estimating in the world can't replace real-world testing. So get your new-and-improved process implemented and start keeping score. Are things taking less time or more to get done? Is the quality of the work being performed improving or not? What's working and what's not working? Be patient. No one really knows the outcome of the game based on the score in the first minute. Let your new process run for enough time in order for you to make decisive decisions and changes with confidence.

5. Empower people operating the process

Generally speaking, the person best positioned to improve a process is the one actually doing it. So get out there and talk to the people who are actually doing the work. In addition to feedback and new ideas, this is also a great way find out if individual people can be doing more–or perhaps different, more valuable things–than they're currently doing.

6. Keep improving systematically

As the saying goes, "The only constant is change." Your new process isn't going to be perfect out the gate. And as we learned earlier, the world around you is constantly changing, so revisit your process again and again and again. We recommend that people actually plan and schedule recurring and regular reviews of their processes or workflows. How often? Of course, the answer is, "It depends". However, as a general rule, we recommend reviewing business-critical workflows monthly, quarterly and annually. Of course, you have to decide the value of your process to your job and the company, and schedule its evaluations accordingly.

By performing regular reviews of your business-critical workflows, you can **keep your department or organization on pace with constant change**.

Really want to go lean? Just do it.

Hopefully Nike doesn't mind that we borrowed their slogan to help us illustrate a key component of Lean, but it captures an important idea about streamlining workflows with Lean Principles. In our experience, when it comes to improving critical business workflows, people generally fall into one of two camps:

In the first camp are the people who recognize that they have a business problem. They

realize their processes are costing them money, wasting time and resources, and that there must be a better way to do things. They call a company, like TrackVia, to see how workflow software can be leveraged to solve their problem and to achieve a vision of doing things better. Next? Well...there is no next. That's as far as they get. They decided to solve their problem, but stopped short of taking any action. As a result, their process doesn't change, and their results don't change.

In the second camp are the people who also recognize that they have a business problem. They too realize that their processes are costing them money, wasting time and resources, and that there's a better way to do things. They then call us and discover that a workflow solution like TrackVia can, in fact, help in a big way. Unlike the first camp, these people take the next steps. They go for it. They organize meetings. They talk with co-workers. They work with vendors like TrackVia to try a new way of doing things and work to implement an internal citizen developer program. And guess what? Their processes improve, and they reap results that would not have been possible otherwise.

So, our final piece of advice? Just do it.

About TrackVia

TrackVia is an online, low-code, workflow software that helps businesses rapidly deploy their own Web or mobile applications to easily streamline data collection and manage operational processes.

TrackVia's detailed dashboards and real-time reporting give you enhanced visibility into your operations, and its unrivaled mobile capabilities make it easy for employees to enter data, scan bar codes, geotag locations, check reports and collaborate on any iOS or Android device.

TrackVia Sales

sales@trackvia.com
720-625-3460