



# Business Process Modelling and Optimisation



To withstand and prosper through times of crisis or challenging market conditions, it's more important than ever to expose and eliminate weaknesses and waste in business processes. By better understanding your processes, identifying and refining those that underperformed, you have the opportunity to exit difficult periods stronger than you entered them.

In this paper, we set out why doing this is important and the advantages gained, and outline the CBO approach and how we can support you.

## Introduction

Whilst recent events have forced many businesses to make difficult decisions to survive, it's important to recognise that all firms have the opportunity to optimise their processes to become more efficient and effective in a new working environment. Indeed, as companies consider how to improve their current operations, many anticipate a more permanent shift in the future of business operations, remote working, technology and automation.

**So now is the time to assess how your organisation may be able to improve processes and provide benefit for years to come.**

To fully understand your processes and to identify and prioritise those that require attention, it's important to adopt and apply a 'Business Process Modelling' methodology.

This proven and effective approach is commonly adopted by many organisations to ensure that they are implementing **robust process management and operating efficient and effective processes.**

As a specialist change and project management consultancy, CBO has a strong business analysis practice and has worked with many organisations to successfully introduce, adapt and apply this methodology.

We provide an overview of what Business Process Modelling is, and how it works. Should you wish to understand the potential of this approach in more detail, please do contact us for an informal discussion at [coffee@cboprojects.com](mailto:coffee@cboprojects.com).

## CASE STUDY 1

Following a policy change, CBO supported a series of complex process changes across several departments. This involved baselining and simplifying the as-is processes and procedures, followed by creation of to-be/new processes and procedures. This required liaison with a large range of stakeholders and support of the processes until they were fully adopted into business as usual.



## Overview

At its simplest, Business Process Modelling seeks to improve business performance by ensuring that all the activities required to provide a product or service are effectively, efficiently and consistently coordinated. Done well, it can deliver a number of significant advantages to an organisation (see diagram below).

### 1. Understand the business:

Robust process management, combined with strong process modelling analysis, gives you the information you need to understand the way your business actually works, not just how it is supposed to work. When things are going wrong on a macro level, this understanding is vital to identifying vulnerabilities in the business at a micro level, so you can make the changes needed as quickly as possible. After all, in challenging or distressed market conditions, time will be a critical factor.

### 2. Improve efficiency and effectiveness, eliminate waste:

Many businesses continue to rely on inefficient systems, which result in wasted time and resources. These points of weakness can be identified and then removed, improved and even automated if appropriate. This can lead to enhanced performance, increased employee satisfaction and improved service to customers.

### 3. Build resilience and adaptability:

It is difficult to adapt processes if there is no clear understanding of how those processes actually work, or if there is limited confidence that they are resilient enough to cope with change. This is a challenging enough situation when you are choosing to undertake a business transformation – it is even more worrying when rapid and major change is necessitated by external factors. Knowing that your processes are optimised to be the most efficient and effective they can be will give your organisation the structure needed to take advantage of new opportunities or face new challenges, whether over a week, or months, or a permanently changed operating environment.

### 4. Drive consistency:

Strong process modelling means key business activities are clearly documented and understood by all your staff. In turn, this drives consistency and standardisation within and across processes, leading to less time spent in management of exceptions and fewer mistakes. This also makes it easier to provide training to staff and to confirm roles and responsibilities for each process.



## CASE STUDY 2

As a result of a strategy change, CBO led the process modelling and optimisation required in order to move a manual Co-Secretary and Compliance 'system' held mainly in Excel spreadsheets onto an existing but under-utilised ERP system. This single version of the truth was easily searchable, reduced errors and cut the costs of running reports, inputting and paper storage.

Our approach to Business Process Modelling conforms to industry best practice and consists of five key steps outlined below, together with a description of how CBO can support organisations in each step.



Process Step	Key Activities	How CBO can help
<b>Identification</b>	<ul style="list-style-type: none"> <li>The first stage in our process involves the identification of in-scope processes.</li> <li>For example, these may be processes that have been negatively impacted as a result of external events, or relevant processes as relate to other transformational activities.</li> <li>More often than not, processes span across functions in an organisation (for example sales – finance – IT) so they are not always fully understood or identified.</li> </ul>	<ul style="list-style-type: none"> <li>We work with you to identify processes, and the high-level relationships/dependencies between them.</li> <li>We can also apply our prioritisation techniques to help you define which processes should be analysed and in which order.</li> <li>We then work with you to identify business goals and potential benefits from process optimisation.</li> </ul>
<b>Documentation</b>	<ul style="list-style-type: none"> <li>This stage involves documenting processes using recognised methods and notation techniques.</li> <li>The processes to be documented may be to capture the 'As-Is' state as a baseline, with further documentation activities required, i.e. 'Should/ Could/To Be', depending on the purpose of the piece of work.</li> <li>Various tasks and activities may also be measured in terms of their efficiency, efficacy and effectiveness.</li> <li>At this stage, the first physical Process Modelling artefacts are delivered to your organisation.</li> </ul>	<ul style="list-style-type: none"> <li>We work with you to manage this phase of analysis, coordinating and/or completing the documentation to industry standards.</li> <li>We will create the process documentation as required, e.g. process library, process status heatmap, process maps/flow-charts</li> </ul>
<b>Analysis &amp; Improvement</b>	<ul style="list-style-type: none"> <li>The documented processes will be analysed within the context of any business requirements and a conclusion formed of what the 'As-Is' analysis tells us.</li> <li>Improvements are then suggested and documented/modelled.</li> <li>Improvement involves ways of addressing identified issues through rebalancing of the process's efficiency, efficacy and effectiveness as documented in the previous stage.</li> <li>The identified changes must then be agreed.</li> </ul>	<ul style="list-style-type: none"> <li>We will help your teams, as the owners and experts of these processes, to complete the analysis of each process in order to identify the improvements and changes required.</li> <li>We will facilitate workshops with your process teams to expedite this activity and help coordinate/complete the outcomes and updates to documentation as required.</li> </ul>

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<b>Implementation</b>	<ul style="list-style-type: none"> <li>Once agreed, a plan must be formed for the transition of an organisation's systems/ processes/technology to the desired state.</li> <li>This will incorporate requirements definition where appropriate.</li> <li>Several different approaches may be taken to test, pilot, deliver and embed the required changes and typically an integration of skills and disciplines is required at this stage (e.g. project management, development or sponsorship).</li> </ul>	<ul style="list-style-type: none"> <li>We will bring to bear our project management expertise to work with you to create a pragmatic delivery plan.</li> <li>We will support the capture of any additional business requirements.</li> <li>Further, we can help you to plan this work alongside competing projects and priorities (using our Portfolio Management methodology – <b>please click here for more information</b> ).</li> </ul>
<b>Control</b>	<ul style="list-style-type: none"> <li>Once implemented, it's important that any new process or process change is monitored for its effectiveness.</li> <li>This supports benefits realisation and also provides the opportunity to adapt and change again quickly.</li> </ul>	<ul style="list-style-type: none"> <li>We can support you with any project mobilisation activities as required.</li> <li>We can also ensure that you have appropriate mechanisms in place to track benefits and enable continuous improvement across project activities.</li> </ul>

### CASE STUDY 3

Alongside the management of a migration to a new platform, CBO also led the process modelling work to eliminate paper-based checklists for a service desk platform within an IT department. As a result, work became easier to manage, prioritise and audit.

### How we can help

We have been supporting many organisations to understand their business processes, modelling, documenting, managing and enhancing these to deliver improvements across their operations. Our team is one of highly experienced and skilled project professionals and business analysts who work collaboratively with our clients to implement and enhance their approach to Business Process Modelling and Optimisation.

**If you are interested in learning more about any of the topics raised in this paper, please contact one of our team.**

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We would be delighted to discuss our experience and insights in more detail with you over a coffee.



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