

PROCESS MAPPING: HUMAN-CENTERED DESIGN AND PROBLEM SOLVING #LPIHQ

WHAT IS HUMAN-CENTERED DESIGN?

"Human-centered design is a problem-solving technique that puts real people at the center of the development process, enabling you to create products and services that resonate and are tailored to your audience's needs."

(<https://online.hbs.edu/blog/post/what-is-human-centered-design>)

IDENTIFYING THE PROBLEM & THE GOAL

The missing piece in this sort of puzzle is -- how do you get there (ideal state) from here (problem statement)?

For the following framework, we used business intake and allocation of work within a corporate to illustrate how to identify the problem and solve for that problem.

Identify the problem. For example, there are too many tickets being created in the different departments, duplicates and on different systems, issue tracking, ticketing or CRMs.

- **What is the goal?** Each business unit uses single ticket during intake.
- **What are the proposed solutions?** All units migrate to single system or integrate multiple systems, etc, instead of using multiple siloed systems.
- **What are the challenges?** Some challenges include change management, external factors and even compliance risk.
- **Who do we need to involve?** Everyone impacted by the problem, such as legal, finance, compliance, operations, sales, solutions engineering, and external partners
- **Ask people could it be better?** How do they get their work?
- **What impact would a new process make?** What difference does it make? For instance, better ability to compute SLAs.
- **What are the barriers and bottlenecks?** How can we convey to, for example, the sales team that there is a difference between when a contract is written on our paper versus when it's written on the customers paper.

At the end of the day, we are looking for improved workflow and reliability. We want to improve the process and do things better.

KEYS TO PROCESS MAPPING

INSTITUTIONAL KNOWLEDGE, PLAYBOOK, AND RISK MITIGATION

A process map can act as a data bank of institutional knowledge, how a process is completed and kept, even as people in the institution may come and go. Moreover process maps are a playbook, in the sense that, if you follow the process map, you cannot go wrong. And by abiding to the playbook, you mitigate risk as a result.

"From each individual engagement, we've got a process map at the start of that. Almost like a transaction bible-- here's all of the connections that you need to make as part of this process -- whether it's an external regulator or whether it's an internal sub service line, we have all of those. It's essentially, --this is how you do this engagement and off you go."

THE COMMITMENT TO MAKING PEOPLE'S JOBS BETTER - MORE VALUE

Sometimes it's not about improving the process, but making people feel more valued.

"I want to make someone's work better, right? Not necessarily faster, but qualitatively better... My belief in this is it comes down to meaning. Like I want your job to be meaningful. I mean, whatever that is. ...I am a person and I am special. And so how do you make sure that a person feels special at their job? What's the meaning?"

THE HUMAN-CENTERED DESIGN APPROACH

CRITIQUE

Now that you have identified the problem, the goal and your new idea, it's time to get into human-centered design. Go and try to understand who's out in the world. What are their needs and the needs of the end user. In human-centered design, it is important to keep in mind that often the people who are doing the work are the ones with some of the best ideas.

Example: People in sales will have some thoughts about improving their communications with legal - How the relationship could be improved, and how we can get to a better place.

This is where you can ask for critique - What did you love? What didn't you love? What do others involved love or didn't love? For example, feedback from a stakeholder had some negative critique about a portion of the process in ticket creation, but what about other departments? How do we work together on these tickets?

DIRECT, INTERNAL AND EXTERNAL

We communicate with the people directly involved, but we have to consider externals.

Example: We have to bring in compliance. Do they need to do XYZ when we create tickets, because compliance has their own ticketing system. Finance department and deal team also have their own tickets, so we actually have four tickets in our main issue tracking system. The attorneys create tickets in our CRM, and they would love everyone else to integrate, but CRM admins do not love the idea, because it would be a ton of work for them. Communicating with everyone involved is very important to get to the best solution for everyone involved.

HUMAN-CENTERED PROBLEM SOLVING

When finding a suitable solution, all parties impacted have to be content or happy with the solution. Communication is key. Talk to them and understand what they think would be the best solution.

By talking with lawyers, we find that they are happy if they can launch a ticket directly from our CRM that gets populated into an issue tracking ticket. Speaking with our deal team, we learn that others are not really into opening up deal team tickets. Speaking with finance, we learn that there's a private queue, which is confidential. Which leads to speaking with compliance, who would like to educate people on what compliance does. Finally speaking with IT, they said it's not a problem, just let them know how the ticket should travel.

REVIEW THE SOLUTIONS

Look back at the problem you are trying to solve and look at your solutions. Which ones work and which ones don't work? Why? How do these solutions benefit all parties impacted?

Example: Solution 1 - replicate the issue tracking tickets. This would have caused further problems. Solution 2 - We are looking at the larger systemic change to improve and address a number of concurrent problems that have the same root cause. Everyone creates their own issue tracking ticket. Let's step back and understand what we're trying to do and how we can better work together with a single solution. So, final solution, we are going to create a new issue tracking ticket type.