



## **DOCUMENTING FOR THE FUTURE ENSURING LONG TERM SUCCESS**

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### **Organizational Overview**

FLHAME+ division consists of various verticals and horizontals covering MFG,TTL,HC,ERU, PS, MPE & Retail. This division is headed by Senior Vice President

The revenue of the division is about \$50 million

Core strengths – Enterprise level solutions in diversified areas; Productization, Global presence. Driven by Thought Leadership and Innovator. Strong Focus on PPT (People, Processes & Technology). Operations - primarily in the India, China, Asia and Europe. Productization and Project Monetization is one of key focus areas of FLHAME+ division

### **Implementation of Proactive Value Added Activities in Flhame:**

After thorough brainstorming on how to arrive at Proactive improvement of

Project Management Processes and Methodologies, we derived the following 4 key Proactive Value Add Activities:

1. Standardization of Process Documentation
2. Specialized domain Training
3. Registration of Kaizen Evaluation
4. Automation of Work Flow and Reporting

Let's go through each concept and case studies one by one.

### **1. Standardization of Process Documentation**

**Background:** Process Documentation is compiled based on initial learning document prepared by Business Analyst and Transition SME during the time of transition. Each process or LOB is supposed to have Scope of Work (SOW) document, Master Service Agreement (MSA) and Process Document. Few processes have several sub-processes. Apart from this we do have Project Management Document. We should have all these documents reviewed periodically as there would be various updates coming from client or end user side. The Head of Organization



wants all the documents up-to-date while maintaining the Documents with latest information/update is the key challenge for operations team as it is very time consuming and needs documentation skills.

**Goal:** Up-to-Date Process Documentation as per ISO standards and updated with latest/recent updates from client with version control.

**How did we do:** We have appointed a dedicated expert who is highly skilled in document/content writing and followed the below process to Standardize the documentation.

- a) Collection of all Process Documents as-is state from each LOB
- b) Cleanse the documents, delete unrelated, duplicate documents
- c) Formatting the document as per basic document guidelines as first step
- d) Coordinate with each process owner to appoint an SME to verify the content
- e) Re-write the content, process flow diagrams, screen-shots as per latest updates
- f) Re-format the document after discussion with SME and

Quality Analysts

- g) Share the updated document to process owners for client sign-off

Keep the Document with version control and date of modification for ready reference

Maintain Change log to track and record all updates on real time and capture these updates in process documentation at periodical intervals depending on the complexity of the process

**Outcome/Benefit:** We started the standardization activity in Dec'12, covered all the major process of FLHAME+ and completed for 35+ major client processes the Standardization Activity over the period of 7 months. It has been well appreciated by clients and this is one of the key reasons for higher customer satisfaction. Now the Vertical Head has all the documents updated and ready for reference, It's a periodical ongoing activity...

## **2. Specialized Domain Training**

**Background:** Process knowledge and Domain Knowledge are vital for all the back office processes while we process end-end transactions as per scope and SLAs committed to clients.



For advisor or executive level employees, we have strong process training methodology which is primarily covering based on scope of LOB. Process training is partly through classroom sessions and mostly by on job training. This is common training and there is no specific training for SME or Process Manager or Project Manager. There should be periodical cross-training happening across the LOBs, which will enable the process owners to rotate the team members to avoid job monotony. The Head of Organization wants to rotate employees across various LOBs as mandatory exercise periodically to maintain healthy ageing of the processes.

**Goal:** We should have Domain Training with Certification (either internal or external) for all SME, Process Manager and Project Manager across various domains of FLHAME+

**How Did We Do:** We have Integrated Training activities across FLHAME+ and came up with Org structure for Training Delivery covering

People Development Training – i-learn  
Domain Training – Process Training  
Specialized Domain Training –

Internal/ External Certification/  
Institutional Training

Cross-Domain Training

We appointed a dedicated Training Manager who is highly passionate and skilled training delivery assisted by Training Coordinator. We rolled calendar for i-learn and domain trainings and drove for high nominations. Skill platter has been deployed to track weekly training hours contributed by trainers. We rolled out weekly review to discuss with all trainers and stakeholders on no. of training hours delivered across various centers and LOBs and to derive way forward plans. Apart from internal i-learn and process training sessions, we planned to have at-least one Certification Training either internal or external every month

### Outcome/Benefits

1. Internal Training on People Development by Trainers covering Soft skills, corporate Etiquette, Email etiquette etc..
2. i-learn Training on nomination basis, 30% of total FLHAME+ nominated for May & June'13
3. Six-Sigma Green Belt Training Certifications – 4 batches in 1<sup>st</sup>



half of 2013

4. Cross Training between two major SCM Clients of Sourcing & Procurement and Order Management to exchange domain knowledge
5. Nominated employees for 3 major workshops conducted by CII/ IIMM in 1<sup>st</sup> half of 2013

**3. Now the Head of Organization had plenty of resources ready who are trained in various domains, they are getting deployed in various new projects, it's ongoing exercise again Registration of Kaizen Evaluation in Value Creation Portal**

**Background:** All improvement Ideas as captured as Kaizens and this culture is driven across FLHAME+. We contribute maximum no. of Kaizens, but most of the ideas would be limited to implementation stage. Even if we implement, there is no clear track of benefits passed on to either to clients or end users or internal customers. Most of the Kaizens are not evaluated

in terms of Cost Benefit. Most of the process owners or Quality leads feel that there is no direct cost benefit or not possible to derive cost benefit. Hence they are logging all these Kaizens as intangible. When we run the report on Kaizens, we hardly see any cost benefit associated with these Kaizens. Value Creation Portal is one of the best practice recently launched for all processes which is used to capture all the Ideas which will have clear Cost Benefit with proper approval from clients. We need to make use of Value Creation Portal to gain bigger visibility. The Head of Organization wanted to see the benefit and impact of these ideas on overall business.

**Goal:** We should have Evaluation and Cost Benefit Analysis for all Kaizens being posted so far and Log all the key ideas in Value Creation Portal with clear cost benefit approved by clients. This has to be showcased to clients in MBR & QBRs.

**How did we do:** We simplified Kaizen process after detailed discussion with Quality leads & Process Owners and deployed following action points across major processes of FLHAME+:



Pulled the Kaizen dump for all major processes for the period July'12 to June'13 Scheduled a detailed Training session on Cost Benefit Analysis based on concepts of Effort Estimation, Man hours spend on the task, Volume of the task etc. Training is delivered to QAs, Quality leads and Process Managers. Reviewed each line items of Kaizen dump, eliminated non-value add items. Evaluated the cost benefit for all Value Add Kaizens (Ideas) using above methodology to estimate cost Consolidated the cost benefit and summary of idea as synopsis and sent it for review and approval of Process Head/Quality Head Rolled the Value Creation Portal Training to all the stakeholders Created access to Value Creation Portal with formal launch of the portal for that particular process/LOB/Client Started Uploading VA Ideas in VC Portal Order Management Discussed with Quality Lead and Process manager and collected the current work flow process, input details, excel tracker data Conducted brainstorming with Process leads and came up with parameters and

fields to be tracked in Productivity Management Tool and Aux Trackers Developer customized the tool as per process requirement Conducted Training to entire floor on how the use the Tool Deployed the tool with pilot team, kept for observation for a week, reviewed error log & compliance etc. in week1 and made necessary corrections to tool Deployed the tool to entire floor on week2 as go live activity and monitored the progress Daily and weekly progress reports, performance reports are shared with all stakeholders

**Outcome/Benefit**

We launched Value Creation Portal for 15 Major client processes during 1st half of 2013 months. Out of the Kaizens reviewed, most of the Kaizens are posted in Value Portal with Cost Benefit/impact study on overall business for the respective process. Now the Head of Organization has visibility of impact of these Value Ideas on Business and it is ongoing exercise.

**4. Automation of Work Flow and Reporting**

**Background:** After detailed study of



work flow process and reporting methodologies, across FLHAME+ processes we observed that work allocation is happening manually through excel sheets. We get inputs from clients through mails and these input line items are manually entered in to excel trackers and from there the line items would get distributed manually by Process owners or leads to individual executives or advisors. There is no real time visibility of Productivity or Aux usage or status of work stack or backlog visibility. This is leading to quality issues in some instances where advisors are pushed with imbalanced count of line items. Our MIS/BIA teams is already having repository of various small tools /excel macros

e.g. Productivity Management Tool (PMT), Aux Management Tracker, Web scrappers etc.. We can deploy

these tools appropriately across FLHAME+ process as part of Automation and improve efficiency. The Head of Organization wants to reduce manual efforts and drive Automation within the processes to improve efficiency.

**Goal:** We should deploy Productivity Management Tool (PMT) and Aux

Management Tracker which has been developed by our internal MIS/BIA team tp avoid manual trackers

**How did we do:** We made joint visit along with MIS/BIA experts to study the feasibility of Automation and deployed the following action in one of key client process delivering

### **Outcome/Benefit**

PMT Deployment is one of the success story of Automation by our internal team. We have deployed all these in-house readymade tools Work Flow Tools, Web scrappers, Aux tracker, Agent Score Card Interactive Dashboards etc. across various FLHAME+ processes as part of sharing best practices. This is ongoing Value Add activity by our BIA/MIS team; cost benefit would be derived to estimate actual impact of this Automation exercise.

### **Challenges faced during deployment**

- Getting periodical updates on process changes from SME on Process Documentation and content review is major challenge. Introduced update Log to overcome this challenge.
- Identifying training needs and



getting right nominations for Certification courses is key issues.

Stakeholder review is very important to bridge the gaps.

- Compliance to new Tools deployed is the major issue; we had to roll several briefing sessions and refresher training sessions to get 100% compliance.

### **Overall benefits**

Productivity and efficiency improvement; End user satisfaction; Employee satisfaction; Employee retention; Quality & Compliance Automation; Change Management; Value Addition to Clients  
No Escalations & all Appreciations from Clients/End Users/Employees