

# Keep Your Customers In View

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Is your business as efficient as it should be? Or do customers slip through the cracks? Many small businesses struggle just to get routine things done, but a careful analysis of the steps you take in dealing with customers is almost always worth the time you invest. Examine the way your business functions and the daily tasks employees perform. Take a special look at the role IT systems play in the process. Then look for ways to improve and serve the customer better and less expensively.

This is all common sense, of course, but it goes quite a bit further and has grown into a field called business process analysis, or business process management. Companies pay hundreds of millions of dollars a year in software and services for it.

Years ago, I worked at the New Jersey Medical School National TB Center. Part of what we did was provide preventive therapy for people infected with tuberculosis. Those who were infected but not sick were asked to take medication for six months. It's pretty hard to get someone to take a pill every day who doesn't even feel sick, so many patients in this category stopped coming to the clinic, and we couldn't follow up with them. In public-health terms, that's considered a "negative outcome." In business-process terms, compare it to someone coming into a retail store in need of something, looking around, and leaving without buying anything.

## Fixing a Business Process

The first step in my analysis was to involve everyone who played a role, from clinic staff to data entry clerks to health officials to the IT director. We looked at the process of preventive therapy and created a process diagram, paying special attention to where we thought patients were slipping through the cracks. Manually reviewing patient charts to schedule appointments wasn't working. We mapped the old, manual process and a new, automated process.

I developed a custom database that automated the generation of reminder and missed-appointment letters, lists of delinquent patients who needed follow-up calls, and reports. It worked. We demonstrated a statistically significant increase in the percentage of patients who completed preventive therapy.

## Do Your Own Business Process Analysis

According to Ron Wince, CEO of Guidon Performance Solutions, a key factor in project success is engaging employees. Many people are resistant to change—especially when the change is dictated from above. It's important for IT to understand the business side of things, and vice versa. "Hold short collaborative brainstorming sessions with cross-functional teams," advises Wince. To write an effective database, for example, the developer needs to understand how it will be used.

- **Take a baseline measurement** – Whether you measure your success by straight financial figures or other metrics, take stock of your current rate.
- **Be the customer** – Look at your processes from the customer's perspective.
- **Diagram the process** – Create a process diagram that shows the steps that a customer must go through to complete a transaction. I like to use Visio for this.
- **Use fresh eyes** – Try to view the process as an outsider might, not taking anything for granted. Look for procedures that don't make sense, where steps don't seem to be in the right order, and where there's a chance for customers to drop out.

- **Change** – Easy to say, not always so easy to do. Fix the problems you identified, either by changing the overall process or by adding or subtracting technology.
- **Measure the outcome** – No initiative can be called successful unless you can show a positive effect such as an increase in revenue or a decrease in costs.

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