A Process is not

a Project

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Muddled thinking?

I came across a blog post recently that described how Mind-mapping software could be used to capture a process. Nothing exceptional about that except there are far better tools to capture processes but hey-ho, some people love their tools. What bemused me was that the post seemed to start off describing processes and ended up describing projects, for example:

- Start by listing the processes steps (process)

- You can add information on the start and end dates of activities (project)

This reminded me of an article I wrote (a long time ago) about the differences between the two, which I have updated here.

Projects vs. Processes – what are they?

When I start working with a client, they usually want me to help them improve something. But, I and the client don't always have a clear understanding of what it is that needs to be improved. Sometimes the client thinks they know what the problem is, and if we're really unlucky, they've already decided what the solution is.

So, we need to start by understanding what needs to be achieved. We therefore set out to define the PROJECT that needs to be done. We use a Project Definition template for this; it might be called a Project Initiation Document (PID), or Terms of Reference. I've written other articles on how to create a good Project Definition.

This template is used to get as much information as possible about what is happening currently, preferably supported by data. A key part is defining the problem to be solved; what it is, what it isn't.

The problem might be expressed as "the Recruit Staff process is too slow", or " we can't track/reconcile our raw material stocks". The first of these two examples clearly leads to a PROCESS that will need to be examined. The second may, or may not, lead to a process. It may turn out, when we look at

the data, that "further staff training" might solve the problem we've defined (i.e. it's not the process that's at fault, but people aren't able to apply it).

Ideally, when scoping out a project, you should also be able to define what improvements are required, expressed as SMART Objectives. These might look like:

- Reduce the time it takes to recruit staff, from 8 weeks to 4 weeks, by the end of March

- Reduce the number of stock reconciliation discrepancies by 75%, by the end of August

The Project Definition template also enables you to set up the initial plan for the work to be done; i.e. who needs to be on the team, what timescales are involved and what resources might be needed.

A PROJECT is a temporary organisation set up to achieve a specific objective, in a given timescale, with particular resources. It has a start and end date. So, for process improvement, we set up Projects, with teams of relevant people, to achieve our improvement objectives. Once they have demonstrated (quantitatively) that they have achieved those objectives, the teams disband.

A PROJECT definition for an improvement project should include, as a minimum:

- the name/title of the Project (e.g. "Recruitment Delay Reduction")

- a brief description of the problem the project is trying to solve

- SMART improvement objectives, where possible (e.g. reduce cycle time by 70% by dd/mm/yy)

- names of the project Sponsor, Manager, Facilitator and team members

- timescales for the key steps in the process improvement approach (e.g. DMAIC)

- any constraints assumptions, or resource information

If, from the Project Definition, there is sufficient information to decide that this is definitely a Process Improvement project, you would then decide to draft a Process Definition statement, perhaps using the SIPOC framework (see below).

A PROCESS is "an activity that converts an input into an output, by doing work". If a process isn't working well enough, you may need to set up a PROJECT to improve it.

A Process Definition template summarises what we know about the scope of the PROCESS. It tells us about inputs, outputs, customers and suppliers. It also tells us what the process is trying to achieve (e.g. the Recruit Staff process is trying to get the right people, on site, on time).

It doesn't tell us anything about what's wrong with the process, or its current performance. It doesn't tell us when the performance level needs to be improved by, or by how much, or who should be involved in the team to make it better.

The D in DMAIC starts with Define the Project opportunity. Then, if the definition leads you to a process, you Define the Process (ultimately, by mapping it).

An example of a Process Definition template is the SIPOC process definition approach: Suppliers – Inputs – Process – Outputs – Customers. These are the key elements that need to be understood before you rush off to do any process mapping. The template may also allow you to capture extra useful information like the start and end-point boundaries of the process (first and last steps) and any inclusions or exclusions (what's in the scope of the process and what isn't).

It can also be helpful to add to this template a Purpose Statement for the process; why does it exist. This is where people often fall into the trap of describing why they need to improve the process, rather than why it exists.

So, to pick up our earlier example, the Recruit Staff process might have a purpose of "providing the right people, with the right skills, at the right time", compared with the purpose of doing a process improvement project to "reduce the time it takes us to recruit people".

Is a Project ever a Process?

I think the key is in my earlier definition of a project: "a temporary organisation set up to achieve a specific objective, in a given timescale, with particular resources". Projects are transient, particularly if we are talking about Improvement Projects, whereas processes are likely to be more permanent because they have to deliver outputs day in and day out.

Interestingly, many organisations talk about their Project Management Process. This is a permanently re-usable process, used to deliver multiple one-off

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projects. The purpose of each project is different, but each one uses the same key steps, or building blocks, to achieve it.

And, of course, there are many organisations where the key customer-facing process involves delivering projects for customers. Which takes us neatly back to where we started. As consultants, we get involved in projects to deliver improvements for our clients. And, we have a project management process that we re-use to do that.

Our track record

Our consultants have been helping organisations in the private and public sectors to manage and improve their processes for nearly two decades. We have supported European Quality Award winners in their approach to process management and helped clients develop simple, but effective approaches for managing projects.

We are not wedded to a particular methodology. We help clients identify their improvement goals and then develop an approach to achieve these; invariably ensuring their people develop the skills to make further improvements themselves.

You can download more articles on Project Management (including Project Definition), Process Improvement (including SIPOC Definition) at:

www.improvement-skills.co.uk

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