

2024-HS2-INF30035-Business Process Analysis-H1

# ASSIGNMENT 2

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Tutor: Xuemei Tian. Class: Wed 12:30  
Van Dung Cao 103793206  
Nguyen Phuc Dong Tran 103804577  
Lan Nhi Nguyen 104088372  
Phuong Thao Dao 103808003  
Lam Giang Bui 103807929

## Executive Summary

This report presents a comprehensive analysis of the operational inefficiencies encountered by Swinburne Guru Consulting (SGC) and articulates a series of strategic recommendations aimed at enhancing organizational efficiency and client satisfaction. Established in 2012, SGC specializes in coaching services that focus on improving teamwork, leadership, and personal performance, with a particular emphasis on social and educational outcomes. Despite fostering a culture of trust and support, SGC's organic structure has resulted in significant operational challenges, characterized by complex decision-making processes and inefficiencies.

The analysis identifies several critical issues, including excessive scheduling delays attributable to manual coordination processes, misalignment between coach hiring and availability that leads to scheduling conflicts, overlapping responsibilities among staff, and inefficiencies in payment management. These challenges detrimentally impact client satisfaction and hinder the optimal utilization of organizational resources.

To address these issues, this report recommends the implementation of several best practices, grounded in contemporary Business Process Management (BPM) principles:

- **Contact Reduction:** Streamlining communication by enabling clients to book their sessions directly, thereby minimizing delays associated with manual coordination.
- **Control Relocation:** Empowering clients to select their own coaches and manage scheduling, thus alleviating the administrative burden on coach specialists.
- **Activity Automation:** Employing Robotic Process Automation (RPA) to automate routine scheduling tasks, enhancing operational efficiency and mitigating the risk of human error.
- **Resequencing:** Adjusting the hiring process to ensure coach availability is assessed prior to recruitment, thereby preventing post-hiring scheduling conflicts.
- **Prepayment Policies:** Instituting a prepayment model to enhance cash flow management and reduce reliance on manual debt recovery processes.

Furthermore, the report delineates a comprehensive change management plan that utilizes the DMAIC (Define, Measure, Analyze, Improve, Control) framework of Lean Six Sigma to ensure the effective implementation of these strategies. This plan underscores the necessity of structured planning, transparent communication, targeted training, and ongoing monitoring to cultivate a culture of adaptability and continuous improvement.

By adopting these recommendations, SGC is positioned to significantly enhance its operational performance, improve client experiences, and ensure sustainable growth in a competitive market landscape. The successful execution of these strategies is anticipated to lead to optimized resource utilization, increased client retention, and a marked improvement in service delivery.

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# INTRODUCTION

Swinburne Guru Consulting (SGC) is a coaching enterprise located in Hawthorn, founded in 2012 by its owner, Emily Sodapop. SGC focuses on delivering coaching services that enhance teamwork, leadership, and personal performance, emphasizing social and educational outcomes. The organization is committed to comprehensively analyzing and addressing client needs, with a focus on enhancing career opportunities and elevating professional standards.

Within SGC, there exists a robust culture characterized by trust, care, recognition, and support among employees. This culture encourages adaptability, engagement, and transparent communication of ideas, creating a conducive atmosphere for collaboration and creativity. The organic organizational structure of SGC, defined by its adaptability and decentralization, facilitates the seamless flow of information and promotes horizontal decision-making processes. Nonetheless, this structure introduces certain challenges, such as intricate decision-making processes, heightened administrative expenses, and sporadic inefficiencies in operational activities.

The prior analysis has summarized and illustrated the As-Is operational processes of the company, along with potential challenges that may arise. A comprehensive analysis will identify areas for improvement, addressing the specific challenges presented by the current processes. The existing competitive environment underscores the necessity for advanced technology, including integrated information systems, as well as addressing the deficiencies in automation and centralized databases. Additionally, it is essential that modifications in business process management are synchronized with change management for SGC personnel. The primary objective is to improve operational efficiency, elevate customer satisfaction, and optimize resource utilization across all levels of the organization.

# ASSUMPTIONS

As Swinburne Guru Consulting (SGC) moves towards a better model for its coaching assignment process, some fundamental assumptions support the modifications made to improve efficiency and simplify operations.

First, it is assumed that the implementation of a client web portal (which will be demonstrated in the To-Be models) will significantly reduce the amount of manual involvement required in the existing process. The idea removes the need for the Coaching Specialist to manually locate, hire, and assign coaches by letting customers choose coaches directly based on availability in real-time. It is assumed by this automation that the database of coaches is correct and updated and that clients will consistently use the portal to choose. Therefore, we expect tasks like "Find Coach within the company" to be eliminated from the Coaching Specialist's duties without harming workflow.

The second assumption is that, given the system's availability, most clients will be able to find coaches that meet their needs. However, the procedure will return to manual intervention if a customer requests a reschedule or is unable to locate a coach because of scheduling mismatches. The architecture of the system has backup measures that reflect the current to-be model, assuming that such occurrences will be the exception rather than the rule. This preserves the general effectiveness of the automated process while enabling flexibility and guaranteeing that the system can manage special situations.

Furthermore, we expect that the team's administrative load will be lessened by automating scheduling and communication processes like emailing confirmations and showing coach availability. The system will use the client's input to manage regular emails and alerts, such as coach availability, session confirmations, and rescheduling notices. This expects that the automated messaging provided by the system is reliable and satisfies the expectations of staff members and clients.

To sum up, the model is based on the following assumptions: that the majority of customers would accept the self-service system; that the coach availability data will be reliable; and that the system's built-in flexibility will efficiently manage exceptions. This will try to increase client satisfaction and operational efficiency without complicating things.

# Part 1. A brief review on Business Process Management and Improvement

## BUSINESS PROCESS MANAGEMENT TRENDS

In recent years, business process management (BPM) has become one of the most widely adopted strategies for organizations, offering a systematic approach to improving efficiency, adaptability, and overall performance (Hammer 2015; Dumas et al. 2016). This adoption has led to the development of various ideas, approaches, and software solutions designed to support businesses that prioritize flexibility and the effective use of information over rigid, repetitive processes. Van der Aalst et al. (2005) and Gartner (2012) highlight how these solutions evolved from the case-handling paradigm and expanded upon conventional BPM. Many BPM trends have been explained:

- **Intelligent Business Process Management Software (iBPMS):**

Increased analytics, real-time decision-making, mobile process access, social media integration, and support for human collaboration (Gartner 2015a). Moreover, combining BPM software with cutting-edge technologies like artificial intelligence (AI) empowers businesses to recognise and analyse signals while processes are being carried out, make wise decisions, and react quickly to changes in the market or specific client needs (Palmer 2013; Lim 2019).

- **Dynamic Case Management Systems (DCMS):**

In today's dynamic environment, this category of systems has three essential features: delivering contextual information, offering flexibility for modifications at runtime and design time, and enabling caseworkers to select pre-established procedures (Forrester 2011). Digital process automation (DPA) has strengthened its role, incorporating traditional BPM, DCM, low-code software, decision automation, and robotic process automation (RPA) (Forrester 2019).

- **Cloud computing (SaaS, PaaS, IaaS, etc.):**

Wilson (2014) notes that cloud service companies are making significant investments in security in response to increased vulnerability and general security concerns. According to



Qian et al. (2019), the main benefits of cloud computing for businesses are its scalability and flexibility, which allow resources to adapt to changing demand; its dependability and availability, which provide access to resources whenever and wherever needed; and the lack of upfront costs associated with setting up and maintaining software and hardware infrastructure.

- **Analytics/ Business Intelligence (BI):**

Business intelligence (BI) involves using technology to gather and utilize information to enhance business efficiency. An efficient BI system facilitates analysis, makes information exchange easier, and gives staff members, partners, and suppliers quick access to the data they need. It makes use of methods, instruments, and software such as online analytical processing, data warehousing, online transaction processing, data mining, and knowledge management to assess operations, enhance output, and increase organisational awareness (Elbashir et al. 2008).

- **Customer Relationship Management (CRM):**

Strengthens relationships with specific customers to optimise customer value and profitability, making it a crucial management strategy (Payne and Frow 2005). CRM guarantees a comprehensive approach by addressing four categories: strategy, organisation, technology, and customer management. The creation of value depends on the integration of these aspects since it directs the company's resources, procedures, and technological advancements toward a common objective of achieving both commercial success and customer happiness (Keramati et al. 2010). This helps to increase customer loyalty, streamline operations, and customise services, which leads to long-term financial success.

## **IMPORTANCE OF PROCESS ANALYSIS, DESIGN, AND DEVELOPMENT**

Analysing business processes is crucial for understanding the functionality of current workflows and identifying opportunities for improvement. According to Boekhoudt et al. (2000), the first step in the BPM approach involves modeling the current process. This includes analyzing bottlenecks or inconsistencies that make the process ineffective and justifying the need for business process model analysis to clarify key characteristics of the

workflow. He also reported that formal semantic and mathematical modeling approaches are the best fit for analysis. According to Žemgulienė & Valukonis (2018), pp. 226-252, it shows that process analysis and redesign might be used to achieve the goal of boosting company performance.

Under the BPM methodology, process design and analysis interact closely to improve company processes. Process design aims to eliminate unnecessary tasks from company processes, resulting in more output, lower costs, and more hours saved (Harika et al. 2021). Therefore, via the introduction of optimised workflows and processes, process design plays a crucial role in enhancing corporate performance and efficiency. According to Jolanta and Mantas (2018), pp. 230-239, firms may achieve their objectives and function more efficiently thanks to this increase in productivity and operational efficiency.

The goal of process development, which is the last step of the BPM approach, is to increase productivity, lower expenses, and improve corporate performance through the analysis, design, implementation, and optimisation of processes. Businesses may preserve agility, increase productivity, and provide higher-quality results by optimising operations and closely monitoring procedures (Zellner 2011).

## Part 2. Business Process Improvement Recommendation

This section of the report examines key operational challenges currently faced by SGC, proposes best practices tailored to address these challenges, and suggests potential solutions that incorporate these best practices. These solutions aim to effectively resolve bottlenecks and streamline SGC's business processes, enhancing overall efficiency and workflow.

### 1. Excessive Scheduling Delays Due to Redundant and Manual Coordination and Communication

The scheduling process at SGC currently faces inefficiencies due to its manual nature, which requires a coach specialist to match clients with coaches based on availability and skills. This process involves back-and-forth communication, delays, and administrative burden, which reduces SGC's overall efficiency. Clients are also limited in terms of control

over selecting a coach, and the company often experiences bottlenecks when the coach specialist is unavailable or overwhelmed. These challenges slow down the process and impact both the client experience and internal resource utilization.

Researchers have discussed how delays in scheduling can significantly impact client satisfaction and loyalty in service industries like coaching and consulting. According to Bielen and Demoulin (2007), extended waiting times and complicated booking processes often lead to frustration among clients, eroding trust and potentially resulting in decreased repeat business. In the context of appointment-based services, Pinedo et al. (2015) argued that prolonged scheduling processes may even drive clients to seek alternative providers, and negatively affect client retention and business growth. Moreover, scheduling inefficiencies can create a ripple effect, causing operational issues such as underutilized resources and decreased revenue (Pinedo et al. 2015).

To resolve these scheduling inefficiencies, we propose applying three best practices from Dumas et al. (2018):

### **Contact Reduction (Customer Heuristic)**

Contact reduction involves minimizing unnecessary communication between the business and clients to avoid delays from manual coordination (Dumas et al. 2018). In SGC's case, the current scheduling process requires clients to rely heavily on the coach specialist, creating additional touchpoints that delay scheduling. By reducing these points of contact and allowing clients to directly book their sessions, the process can be sped up, which in turn reduces delays and leads to a faster resolution and improved client satisfaction (Bielen & Demoulin 2007). A potential disadvantage, however, is that some clients may still prefer direct interaction with the coach specialist for assistance and support.

### **Control Relocation (Customer Heuristic)**

Dumas and his colleagues (2018) described control relocation as the act of shifting certain tasks to customers, allowing them to manage aspects of the process that would traditionally require internal resources. In SGC's scenario, giving clients the ability to choose their own coach and schedule their sessions would reduce the workload on the coach

specialist. This also minimizes the risk of scheduling conflicts, as clients can directly select times that suit them. One possible downside is that not all clients may be comfortable with this level of autonomy, particularly those unfamiliar with self-service systems.

### **Activity Automation (Technology Heuristic)**

Activity automation focuses on automating manual tasks to increase efficiency and reduce errors (Dumas et al. 2018). At SGC, the scheduling process involves routine tasks such as updating coach availability, registering clients, and sending confirmations, which are currently handled manually. By automating these tasks with RPA (Robotic Process Automation) bots, the time spent on routine administrative work can be minimized, and errors such as double bookings can be avoided. While this approach requires an initial investment in technology and training, the long-term benefits include faster processing and reduced administrative workload (Chugh et al. 2022).

To satisfy all the best practices above, we propose a **website-based scheduling platform**. This platform allows clients to browse available coaches, check skills and availability, and book sessions directly via a registration form. Real-time updates ensure clients can make timely decisions without needing manual coordination from the coach specialist, streamlining the process. In cases where clients struggle to find the right coach or schedule, the coach specialist can step in to assist or recruit additional coaches as needed. This solution integrates RPA automation, reduces delays, and empowers clients, offering a scalable and efficient approach to scheduling.

## **2. Misaligned Hiring and Availability between Coach and Client**

The misalignment in hiring and availability at SGC arises when coaches are hired before their availability is checked to match client schedules. This often results in scheduling conflicts, where the newly hired coach's availability does not align with the client's needs. This mismatch can lead to the coach being let go shortly after hiring or requiring additional rescheduling efforts. The process wastes time, disrupts workflow, and delays service delivery to clients. The current process, which only considers coach availability after recruitment, introduces inefficiencies that hinder smooth operations and coach-client

coordination. A solution is needed to ensure coaches are hired based on availability that matches client needs upfront, avoiding unnecessary scheduling steps and delays.

This issue can be addressed by **Resequencing** and **Activity Elimination** best practices proposed by Dumas et al. (2018). According to the authors, the former involves reordering tasks in the process to improve efficiency, while the latter involves removing redundant or unnecessary steps.

**Resequencing** in this case means checking the coach's availability at the beginning of the recruitment process. In simple words, before hiring, the coach's schedule should be matched with the client's availability. If there's a mismatch, the candidate is not considered. This ensures that only candidates whose availability aligns with the client are shortlisted. This approach reduces delays, streamlines the process, and avoids post-hiring scheduling conflicts. One disadvantage of this approach, however, is that it might limit the candidate pool, as some skilled coaches may be unavailable at specific times.

Once the coach's availability is confirmed during recruitment, the Schedule Assignment process becomes redundant and can be eliminated, referring to the **activity elimination** best practice mentioned above. The coach and his client would then move directly to the Verification stage, where both parties confirm their readiness for the session. This makes the process faster and less complex, although it may limit flexibility if a coach's availability changes to post-hiring, which can be managed with proper contract planning.

The proposed solution ensures that the coach's availability matches the client's schedule before the hiring process is finalized. Only candidates whose availability aligns with the client's preferred times will be shortlisted, reducing scheduling conflicts and preventing unnecessary delays. For example, if a client is available on Monday from 4 PM to 9 PM, only coaches who match that schedule will be considered. Once hired, the coach moves directly to the Verification subprocess without needing additional scheduling steps. Their fixed schedule is updated in the company's system and remains locked for the duration of the contract, ensuring no changes are made during the engagement period. After the contract

ends, the coach is removed from the system, and further sessions can only be booked if they are rehired.

### 3. Overlapped responsibility

At SGC, overlapping responsibilities among staff members, such as the receptionist, coaching specialist, and scheduler, cause significant confusion and inefficiency in task execution. Tasks are often passed between multiple people without clear ownership, for example, the scheduler, Madeleine, handles coordination and scheduling, but if she is busy, tasks like verification or follow-up may be reassigned to other staff, such as Ahmed or Linda. This constant handover of tasks not only slows down the process but also leads to miscommunication and incomplete execution, contributing to employee burnout and ultimately affecting service quality (Salvagioni et al. 2017).

Addressing this issue is critical to ensure employees remain focused on their main responsibilities, reducing the risk of overload and enhancing job satisfaction (KHATTAK et al. 2013). Clarifying roles presents an opportunity to streamline workflows, improve employee morale, and improve service quality. However, if this issue remains unresolved, it could lead to lower employee satisfaction, higher turnover rates, and a decline in service quality, negatively impacting client experience and business growth (Purnomo et al. 2021).

As a result, two best practices are proposed below to address this challenge:

#### **Split Responsibilities (Organizational Heuristic)**

Splitting responsibilities ensures that tasks are clearly assigned to specific actors within the process, eliminating duplication or conflict over who should handle a task. In SGC's case, by clearly separating duties between the receptionist, coaching specialist, and scheduler, task execution becomes more efficient, and accountability is improved. This approach improves workflow and minimizes overtasking (Rupp & Russell 1994) but may also limit flexibility if roles become too rigid (Berg & Pottjewijd 1997).

#### **Case Assignment/Retain Familiarity (Organizational Heuristic)**

This practice focuses on minimizing the number of actors involved in a single assignment, allowing the same actor to handle multiple stages of the process (Dumas et al. 2018). In SGC's case, assigning one person to oversee a client's journey through the system - from initial contact to follow-up - ensures continuity and reduces the chance of communication gaps. This practice improves client satisfaction and streamlines internal operations (van & Hee 2004). However, if an employee becomes unavailable, tasks cannot be easily reassigned to others without risking disruption or confusion, causing delays and reducing flexibility in the process (Hammer & Champy 1993).

The proposed solution is to combine Split Responsibilities and Case Assignment to create a balanced approach that clarifies roles while maintaining continuity throughout the process. By clearly defining each team member's responsibilities, tasks will be more efficiently distributed without overlapping duties. At the same time, retaining familiarity in key stages of the process ensures that the same person oversees multiple stages of the client journey, minimizing handovers and reducing the risk of miscommunication.

#### 4. Inefficient payment and invoice management

The overarching issue of payment and invoice management at SGC contains three distinct challenges:

##### 4.1. Delayed coach payments after service completion:

The main issue with this process is the dependency on the client's prompt payment before the coach's payments can be processed, leading to delays and dissatisfaction among coaches. Timely payments are critical for maintaining positive relationships with coaches, who play a vital role in the company's success.

This underscores the need for implementing efficient invoicing and collection processes to reduce payment delays, enhance cash flow, and retain coaches (Choudhary 2023). Without efficient payment handling, delayed payment can result in coach frustration, potentially decreasing their commitment to the company or even leading them to leave the business. Moreover, the quality of service provided will be compromised, and damage will be done to SGC's reputation.

For SGC's current process, the suggested best practice is **Knock-out (Behavioral Heuristic)**, referring to eliminating failed cases earlier in the process. This could involve checking a client's credit or requesting an upfront payment during the matching stage to prevent non-payment issues, minimizing the risk of wasting resources and time on non-paying clients. While being effective, it may not always be feasible to check these conditions freely, and requesting upfront payments could discourage some clients, potentially limiting business flexibility and impacting client relationships (van der Aalst 2001).

#### 4.2. Inefficient payment reminder process:

At SGC, the current payment reminder process is inefficient, as it relies on multiple manual follow-ups. The bookkeeper sends reminders at 30 and 60 days, and if no payment is received after 90 days, the manager must intervene. This process is time-consuming, diverts managerial attention from more strategic tasks, and delays the collection of payments, ultimately affecting cash flow and the financial stability of the business.

Consequently, the best practice that is suggested for SGC to adopt is **Synchronous Communication (Customer Heuristic)**. Utilizing synchronous communication methods, such as phone calls, ensures faster resolution of critical issues, rather than waiting several business days for an email response (Kock 2007). While this approach ensures clients are aware of outstanding payments, relying on phone calls may require additional staff time and resources, and calling at inappropriate times could make the client uncomfortable.

#### 4.3. Unnecessary manager involvement in debt recovery:

At SGC, the unnecessary involvement of the manager in debt recovery occurs when unpaid invoices are escalated to her after 90 days, requiring her to take over the task of selling unpaid invoices to a debt collection agency. This step adds an extra layer of involvement that could be managed at a lower level, such as by the bookkeeper, delaying the recovery process and diverting the manager's focus from more strategic tasks.

Addressing this issue is essential to streamline the payment process and reduce the manager's operational workload. If left unresolved, it could lead to financial discrepancies,



increased administrative burden, and strained client relationships, negatively impacting business operations (Reijers 2003).

We propose that SGC adopt the **Empower (Organisation Heuristic)** best practice, to give the bookkeeper more responsibility to manage the entire debt recovery process, significantly reducing the need for managerial involvement. By giving the bookkeeper the authority to take this final step, the time needed to report and brief the case to the manager is reduced, resulting in better operations (Poyssick & Hannaford 1996). However, additional training and oversight may be required to ensure that the bookkeeper can confidently handle this responsibility (Buzacott 1996).

To address the payment and invoice management issues, we propose a solution of requiring **full prepayment** before hiring coaches. This strategy ensures that payment is secured upfront, eliminating the risk of delayed or missed payments. By implementing prepayment, the problems of delayed coach compensation, inefficient reminder processes, and the need for blacklisting clients are effectively knocked out. Prepayment effectively removes the need for follow-up reminders at 30 or 60 days, and the possibility of escalating unpaid invoices to management for debt collection, streamlining the process and improving cash flow.

## 5. Resource and Performance

### 5.1. Identifying the Process Bottleneck

SGC's scheduling process is inefficient due to its reliance on manual coordination. The coach specialist is responsible for matching clients with coaches based on their availability and skills, which can lead to significant delays when the specialist is overwhelmed or unavailable.

Therefore, the coach specialist's workload is the primary bottleneck in the scheduling process. Dumas et al. (2013) emphasize that a bottleneck limits the overall throughput of a process, leading to longer cycle times. The necessary back-and-forth communication involved in manual scheduling exacerbates these delays, negatively impacting client satisfaction and resource utilization. Consequently, Extended wait times can erode client

trust and loyalty, as highlighted by Pinedo et al. (2015). Additionally, underutilized coaching resources occur because coaches remain idle while waiting for appointments to be confirmed.

## 5.2. Organizing Staff and Allocating Jobs for 80% Utilization

SGC faces overlapping responsibilities among staff, including receptionists, coaching specialists, and schedulers. This lack of clear ownership contributes to inefficiencies and miscommunication. Therefore, we provided some specific solutions for optimizing staff utilization by clearly defining roles, reducing administrative burdens, and improving workflow efficiency. By minimizing unnecessary communication and empowering clients, the scheduling process becomes faster and more efficient, leading to higher coach availability for client sessions. Activity automation frees up time for staff to engage in more productive tasks while resequencing ensures that hires are ready to meet client demands immediately. This holistic approach not only minimizes idle time but also aligns staff activities with client needs, ultimately achieving an 80% utilization rate. According to Slack et al. (2012), maintaining optimal utilization is crucial for operational efficiency, making these strategies essential for SGC's success.

## 6. Methodology: Lean Six Sigma (LSS)

### 6.1. Overview

- **Focus:** Combines the principles of LSS to address waste and variation simultaneously.
- **Principle:** It employs Lean tools for efficiency and Six Sigma tools for quality control.
- **Application:** LSS is suited for organizations looking to achieve high levels of efficiency while maintaining quality, making it highly adaptable and flexible (Drohomeretski et al. 2013).

Lean focuses on speed and efficiency by eliminating waste (Mustapha, Abu Hasan & Muda 2019):

- Adopting coach and client portal integrating with RPA to get the right inputs from the beginning of the process, eliminating the time needed to fix the errors.
- Requiring prepayments to eliminate the lengthy process of requesting payments and pursuing debts, which can take 30 to 90 days.
- When advertising and hiring new coaches, only hiring coaches having matched availability with clients would reduce time wasted on the wrong input.

Six Sigma improves the quality of services, contributing to increased customer satisfaction (Antony 2011):

- Adopting a coach matching portal to have better coach options and faster scheduling, enhancing client satisfaction.
- Prepayment would reduce the potential defects in the invoicing process.
- Only hiring a coach with matched availability would reduce the variations in the scheduling process.

## 6.2. Why should LSS be used for SGC?

Given the issues and the nature of SGC's operations, **Lean Six Sigma** appears to be a suitable approach for several reasons:

- **Efficiency and quality improvement:** Lean principles can help streamline the assignment process, reducing wait times and improving the flow of client inquiries through the coach and client portal. Additionally, Six Sigma can address the variability in service quality by ensuring that the processes are standardized and data-driven (Yadav, Shankar & Singh 2021). This is particularly important for client satisfaction, which relies on consistent coaching experience.
- **Holistic approach:** LSS provides a comprehensive framework that addresses both waste and quality (Anh et al. 2023; Henny et al. 2019). By integrating both methodologies, SGC can develop processes that are not only efficient but also reliable and consistent.

- **Data-driven decision making:** The use of tools in Six Sigma will allow SGC to measure KPIs effectively, such as the time taken for each subprocess of the coaching assignment process, client satisfaction ratings through the surveys, and coach performance metrics. This data can guide continuous improvement efforts (Clancy, O'Sullivan & Bruton 2021).
- **Scalability and adaptability:** LSS encourages a culture of continuous improvement, which aligns with SGC's goal of adapting to changing demands quickly (Timans et al. 2014).
- **Employee engagement:** Both methodologies emphasize employee involvement and empowerment (Knapp 2015; Roslin et al. 2019). By training staff in LSS techniques, SGC can foster a culture where team members are encouraged to contribute for process improvements.

### 6.3. Impacts on SGC's processes

Adopting LSS will lead to significant changes and improvements in SGC's coaching management processes. This part will analyse how the process can be improved through this methodology about the best practices adopted above:

- **Streamlined communication:** Implementing the client portal will ensure that client requests are processed efficiently. Tools like standardized forms can reduce ambiguity and speed up the information-gathering process.
- **Improved scheduling efficiency:** Lean tools such as value stream mapping can identify bottlenecks in scheduling. Implementing a centralized scheduling portal that allows for real-time visibility of coach availability will minimize delays and increase responsiveness to client needs.
- **Enhanced client and coach matching:** With LSS and the coach and client portal, SGC can develop a more systematic approach to matching and scheduling clients with coaches based on specific needs, skills, and past performance, leading to higher satisfaction rates.

- **Clear roles and responsibilities:** LSS with the coach and client portal will streamline processes, reducing time and manual efforts which allows each employee to concentrate on their specific tasks instead of overlapping responsibilities (Laureani & Antony 2018). This will not only minimize delays and time fixing errors but also enhance quality and boost customer satisfaction.

## 6.4. Adoption plan

### DMAIC:

| Define                                                                                                                                                                                                                                                                | Measure                                                                                                                                                                                                             | Analyse                                                                                                                                                                                                                                 | Improve                                                                                                                                                                                                                                                                                                                                                                 | Control                                                                                                                                                                                                                                                                                                         |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Identify Goals:</b><br>SGC's management team wants to be able to adapt and improve their processes more rapidly over time.<br><br><b>Document process:</b> Refer to the BPMN As-Is model to understand the current coaching management process.<br><br>(1-2 weeks) | <b>Data collection:</b><br>Measure the average time taken for each subprocess, satisfaction scores from feedback surveys, and track the number and reasons for cancellations over the past year.<br><br>(1-2 weeks) | <b>Analyse data:</b><br>Evaluate the current processes and culture to determine readiness for LSS<br><br><b>Identify key issues:</b> explore possible causes, test hypothesis and define corresponding best practices.<br><br>(2 weeks) | <b>Develop solutions:</b><br>Implementing best practices: <ul style="list-style-type: none"> <li>• Activity Automation</li> <li>• Control Relocation</li> <li>• Resequencing</li> <li>• Knock-out , etc.</li> </ul> <b>Pilot Testing:</b> Run a pilot program with a small group of clients to test new processes and gather feedback before full-scale implementation. | <b>Regular Monitoring:</b> Set up a dashboard to track KPIs regularly (process times, satisfaction scores, and cancellation rates).<br><br><b>Documentation:</b> Maintain updated documentation of all processes, including any changes made, to ensure clarity and consistency in operations.<br><br>(Ongoing) |

|  |  |  |                                                                                                                                                                          |  |
|--|--|--|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
|  |  |  | <b>Training:</b> Conduct training sessions for employees on new processes and tools to ensure everyone is equipped to handle inquiries effectively.<br><br>(4 – 8 weeks) |  |
|--|--|--|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|

Table 1: DMAIC process in Six Sigma

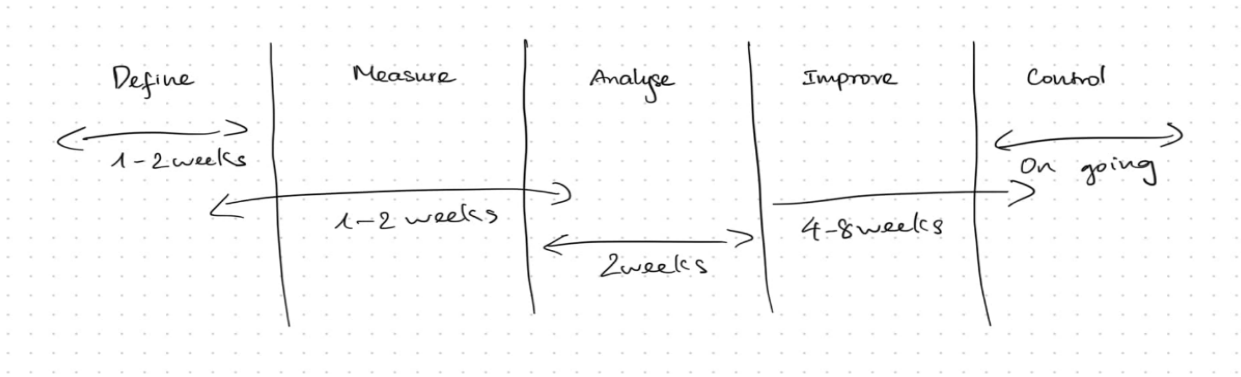


Figure 1: DMAIC process in Six Sigma

During the implementation of LSS, there are some factors that are necessary for successful adoption:

- **Leadership commitments:** Ensure that Emily and the management team are fully committed to the Lean Six Sigma initiative. The management team should show their support throughout the process by regularly communicating the goals and importance of the project to all staff to maintain buy-in and enthusiasm (Laureani & Antony 2018).
- **Engagement and awareness:** Provide training sessions for all employees and keep them actively involved, focusing on Lean Six Sigma principles and tools. This will help

them understand the methodologies and how they can apply them in their daily work (Alnadi & McLaughlin 2021).

- **Change management:** Be prepared to address resistance to change by communicating the benefits of the new processes and providing support to employees during the transition (Lertwattanapongchai & William Swierczek 2014). Further analysis and a plan to manage change effectively will be discussed in the next part.

## 7. Change management plan

According to Tim Creasey (2022), change management involves applying a systematic process and a range of tools to guide the people involved through the change, aiming for a specific outcome. Its primary goal is to facilitate employee engagement, adoption, and integration of changes into their daily tasks.

While various change management methodologies may differ in their specific approaches and terminology (e.g., Kotter's 8-Step Model, Lewin's 3-Step Model), most generally involve four critical steps. These four steps will be discussed and matched with SGC's case situation and improvement solutions in the context of the DMAIC framework for Lean Six Sigma adoption.

### 7.1. Planning

The initial step in any change management strategy is recognizing and understanding the necessity for change. SGC has conducted a comprehensive assessment of its current state, identifying areas for improvement and potential challenges while outlining the desired future conditions. This analysis has generated a sense of urgency for change, particularly given metrics such as client satisfaction ratings and process cycle times that highlight inefficiencies in current operations (Moran and Brightman, 2001).

In alignment with the **Define** phase of the DMAIC framework, SGC will clarify its objectives by defining specific performance metrics to be enhanced. Engaging both employees and clients in this assessment will further validate the need for change. Gathering feedback

through surveys and focus groups ensures that the perspectives of all stakeholders are acknowledged, fostering a sense of ownership from the outset (Balogun and Hope Hailey, 2004).

## 7.2. Communication

Effective communication is crucial for successful change implementation. This involves conveying clear messages about the changes and their benefits to all stakeholders. SGC must articulate the reasons for the changes and the expected outcomes, thereby enhancing transparency and trust within the organization (Kotter, 1996).

This communication phase relates to the **Measure** phase of DMAIC, where SGC will document the current coaching management process and communicate these findings to stakeholders. By involving key stakeholders, including internal staff and external clients, in discussions about the changes, SGC can reinforce its values and demonstrate how the company culture aligns with customer needs. Regular updates and open forums for discussion will help maintain enthusiasm and support for the change initiative.

## 7.3. Training

Once the need for change and the communication strategy are established, the next step is to provide training and support for those affected by the changes. In the context of the **Analyze** phase of DMAIC, SGC will assess the skills and knowledge gaps that exist among employees and then develop targeted training sessions to equip them with the necessary tools and techniques.

During this training phase, employees will learn about Lean Six Sigma principles and how to apply them effectively in their daily work. By actively involving staff in the training process, SGC can foster a culture of continuous improvement and ensure that everyone understands how the changes will benefit the organization. This will also prepare employees for the upcoming changes outlined in the **Improve** phase of DMAIC.



#### 7.4. Monitoring and Evaluation

The final step in the change management plan involves ongoing monitoring and evaluation of the effectiveness of the changes implemented. This aligns with the **Control** phase of the DMAIC framework, where SGC will establish specific metrics to assess the success of the initiatives, including employee satisfaction surveys, measures of process efficiency, and client feedback scores .

Regularly reviewing these metrics will allow SGC to identify areas for improvement and make necessary adjustments in real-time. Additionally, a permanent IT help desk will provide ongoing support for employees who may encounter challenges with new automation processes. This comprehensive approach will help embed the changes into the organization's culture, ensuring their sustainability over the long term.

## CONCLUSION

This report has provided an in-depth analysis of the operational challenges faced by Swinburne Guru Consulting (SGC) and proposed a range of strategic solutions aimed at enhancing efficiency and client satisfaction. Key issues identified include excessive scheduling delays due to manual processes, misaligned hiring practices that lead to scheduling conflicts, overlapping responsibilities among staff members, and inefficiencies in payment management.

To address these challenges, the implementation of best practices such as contact reduction, control relocation, and activity automation has been recommended. Additionally, resequencing the hiring process and adopting prepayment policies will streamline operations and improve resource allocation. By redefining staff roles and responsibilities, SGC can enhance communication and accountability, ultimately contributing to a more efficient workflow.

The proposed solutions are designed not only to alleviate current bottlenecks but also to align with the latest trends in Business Process Management. By leveraging technology and fostering a culture of continuous improvement, SGC is positioned to optimize its operations, improve client experiences, and ensure sustainable growth in the competitive coaching and consulting landscape.

In summary, the successful implementation of these strategies will enable SGC to enhance its overall performance, better meet client needs, and maintain a competitive edge in the industry.



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## APPENDICES

### Appendix 1: Group 21 Contribution Form

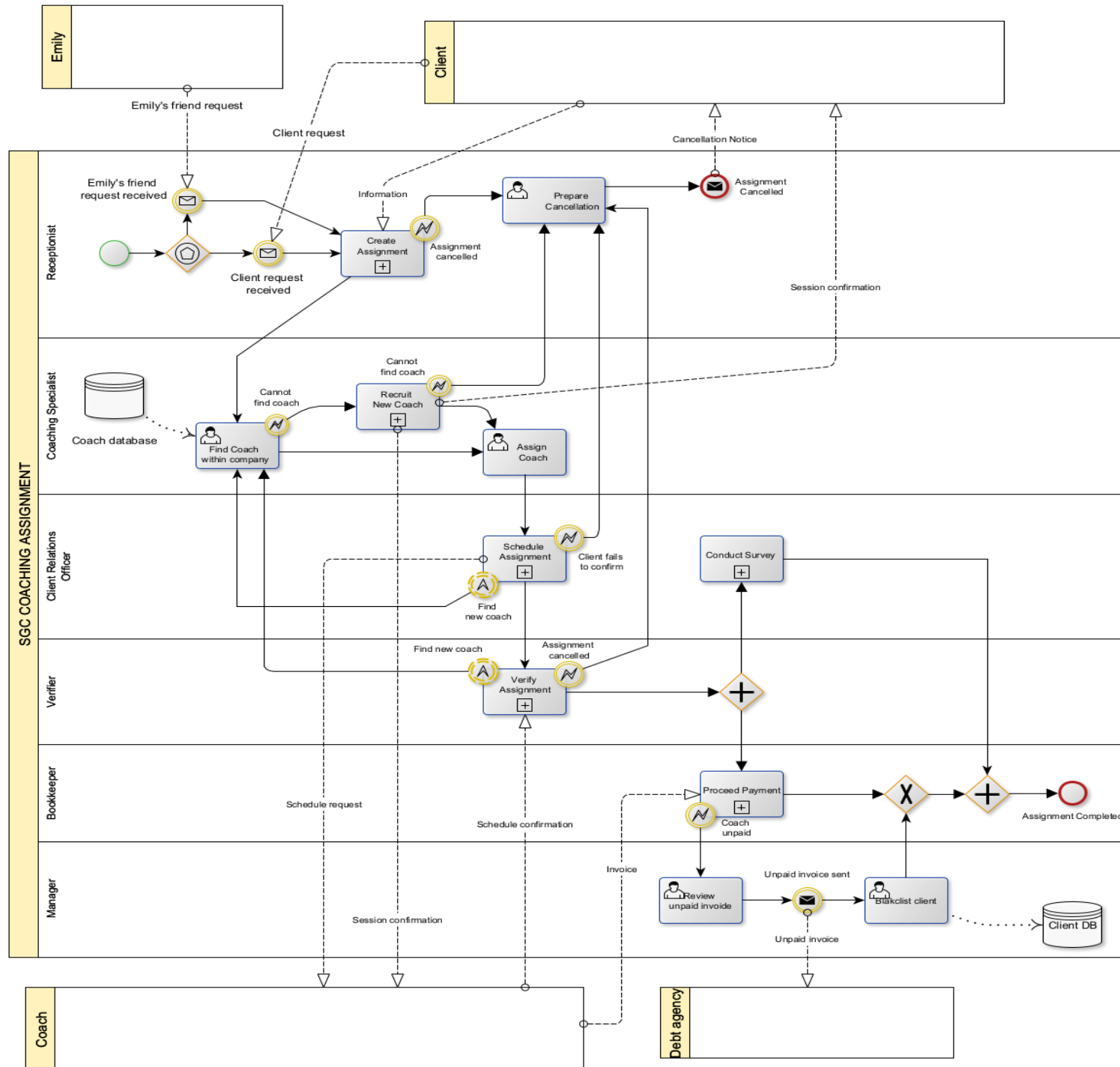
| Tasks                                                                                           | Team Members             |                   |                    |                  |             |
|-------------------------------------------------------------------------------------------------|--------------------------|-------------------|--------------------|------------------|-------------|
|                                                                                                 | A: Nguyen Phuc Dong Tran | B: Lan Nhi Nguyen | C: Phuong Thao Dao | D: Lam Giang Bui | E: Van Dung |
| <b>Team meetings</b>                                                                            | 4                        | 2                 | 1                  | 2                | 1           |
| <b>Review meetings with teaching staff</b><br>(preparation, attending, follow up)<br>(Optional) | 4                        | 1                 | 1                  | 3                | 1           |
| <b>Team management and administration</b>                                                       | 4                        | 4                 | 2                  | 1                | 2           |
| <b>Research</b><br>Searching and analysing                                                      | 2                        | 2                 | 4                  | 1                | 2           |
| <b>Construct Process Modelling</b><br>Analyse the case, development, constructing, development  | 4                        | 1                 | 1                  | 4                | 1           |

|                                                                                              |     |     |     |     |     |
|----------------------------------------------------------------------------------------------|-----|-----|-----|-----|-----|
| <b>Team Documents (e.g. Assignment report)</b><br>Preparing and Writing                      | 2   | 1   | 3   | 1   | 4   |
| <b>Reviewing</b><br>Checking and correcting other's work                                     | 2   | 2   | 2   | 2   | 2   |
| <b>Percentage of your total contribution (Total of members' percentage should be = 100%)</b> | 20% | 20% | 20% | 20% | 20% |

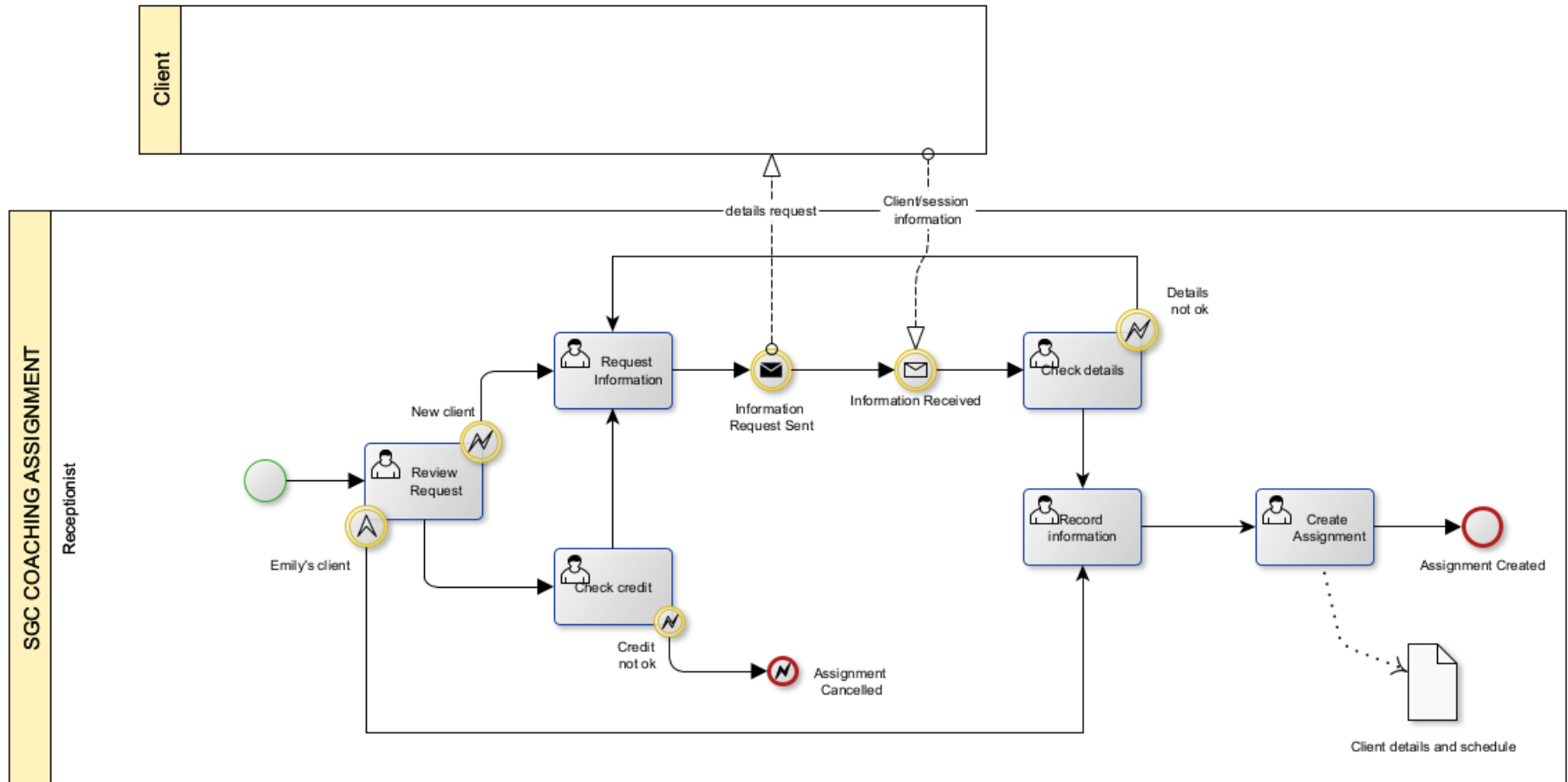
| Member's Name            | Members Signature                                                                    |
|--------------------------|--------------------------------------------------------------------------------------|
| A: Nguyen Phuc Dong Tran |    |
| B: Lan Nhi Nguyen        |    |
| C: Phuong Thao Dao       |    |
| D: Lam Giang Bui         |   |
| E: Van Dung Cao          |  |
| Date: 18 Oct 2024        |                                                                                      |

## **Appendix 2: SGC As-Is Models**

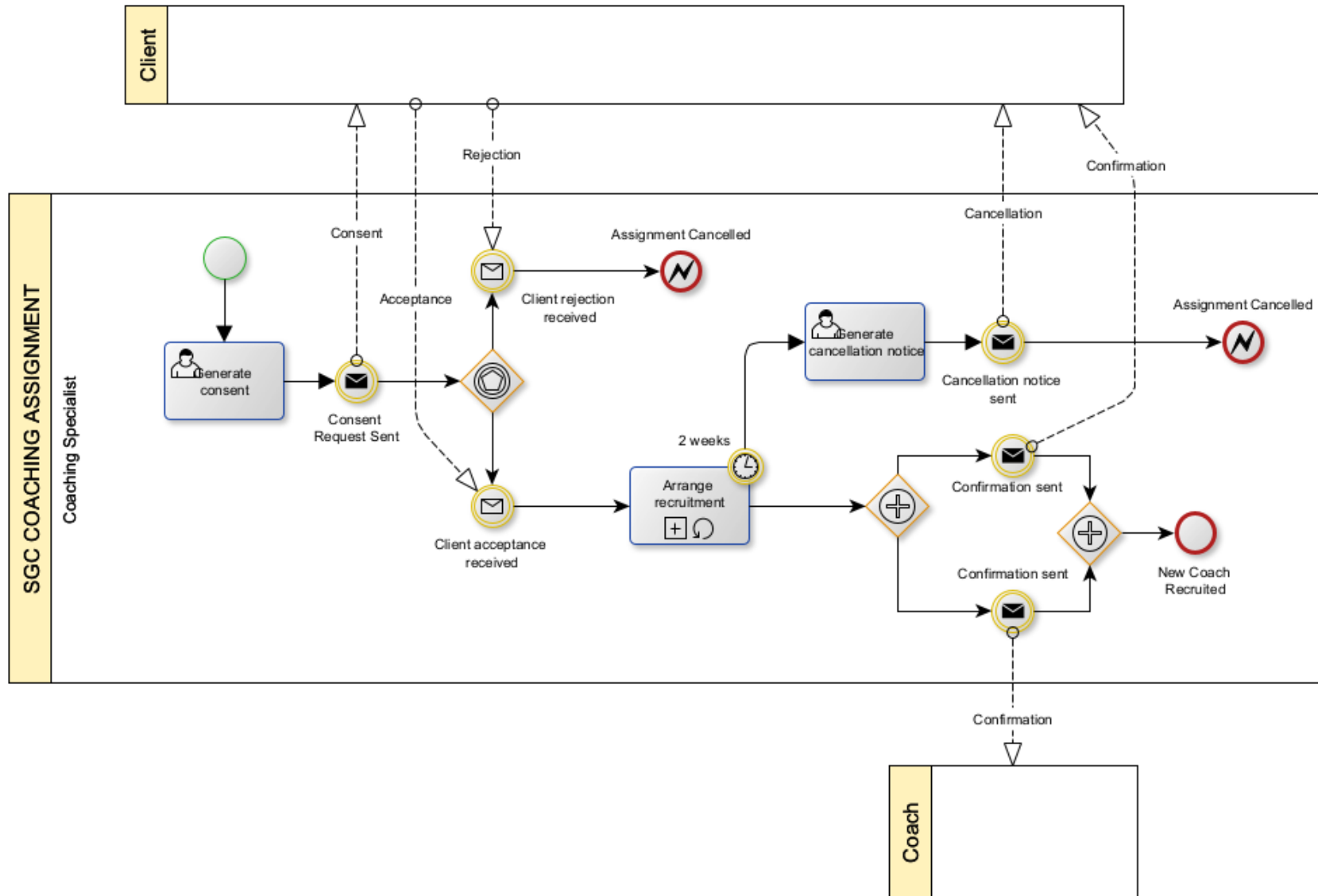
### **1. Main process**



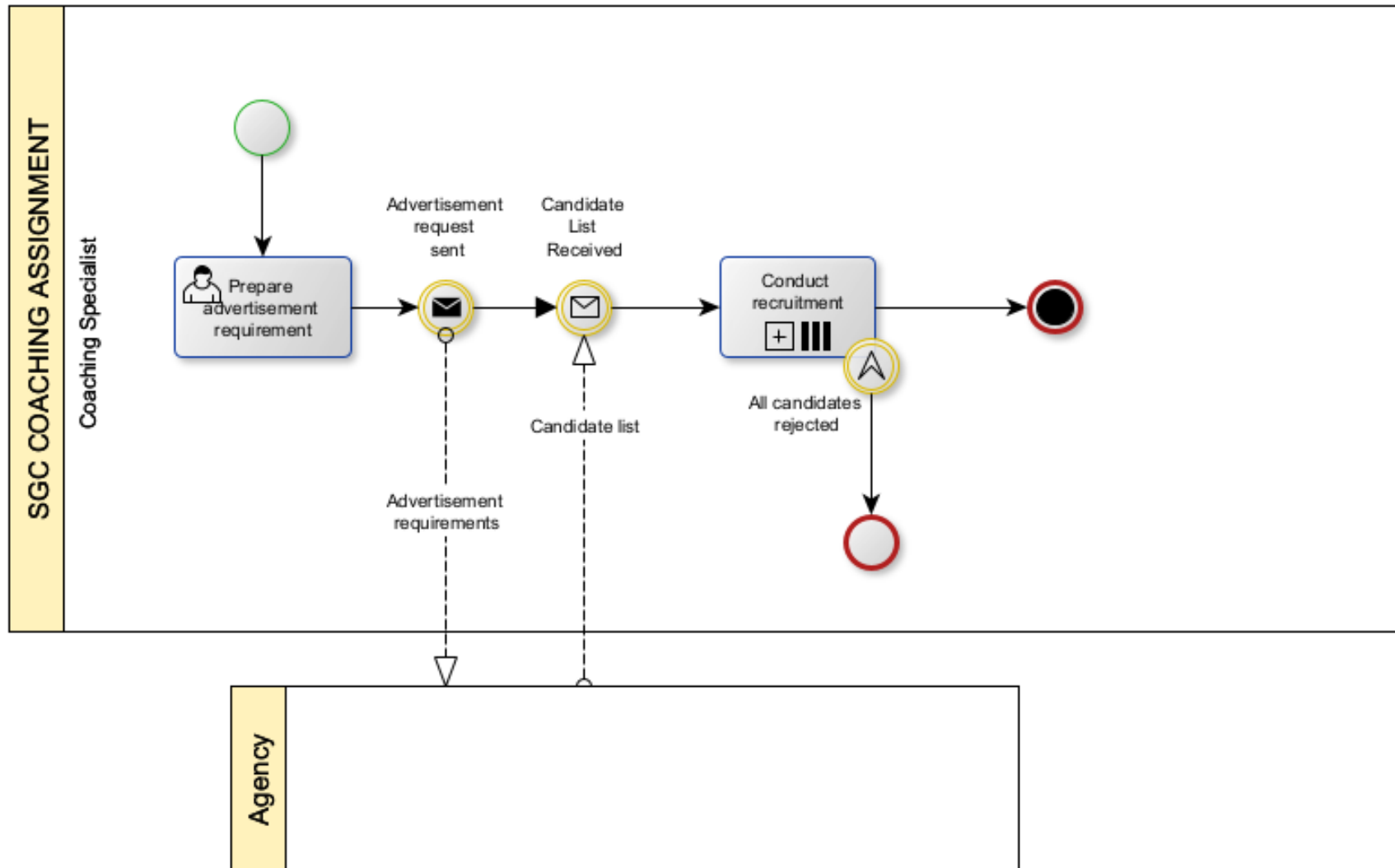
## 2. Create Assignment Subprocess



### 3. Recruit New Coach Subprocess



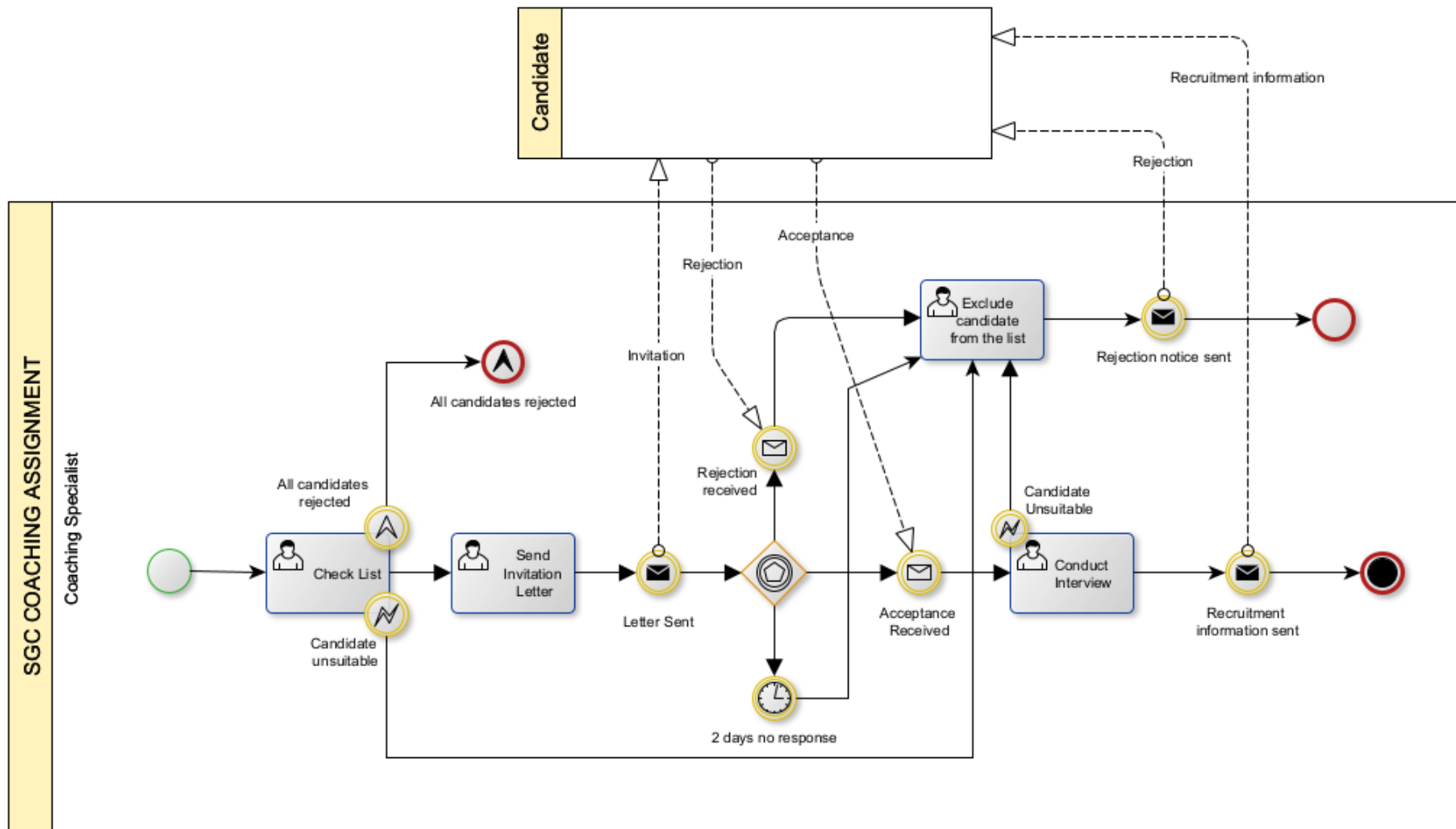
#### 4. Arrange Recruitment Subprocess



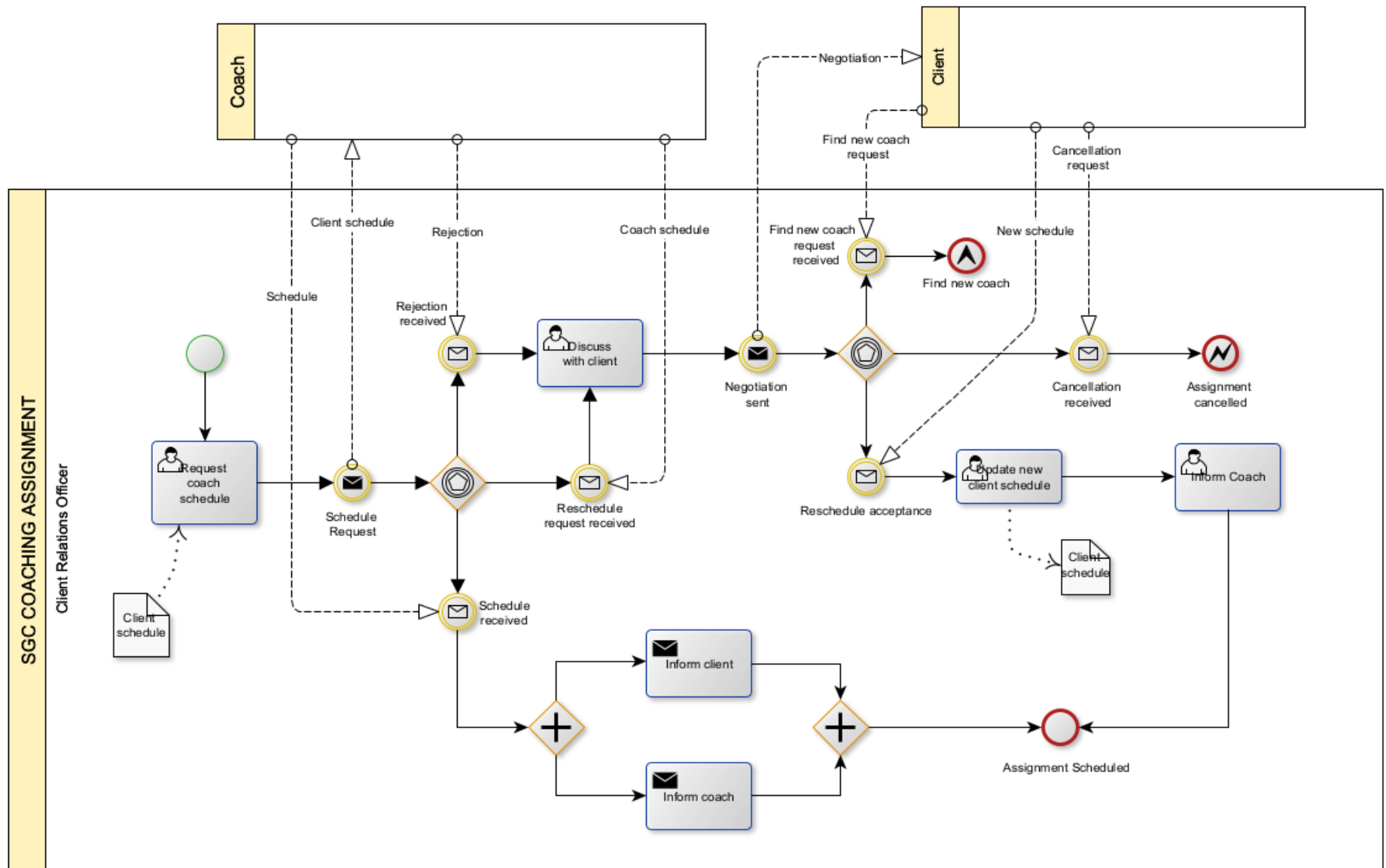


**Clarification:** This **Arrange Recruitment Subprocess** is a Serial loop that has a 2-week timer boundary event. This means that the process will stop when it exceeds the 2-week time frame. The process keeps sending the hiring requirements to the advertising agency, and receiving a new list of candidates **once all candidates in the old list have been rejected** (which will be conducted in the **Conduct Recruitment** Concurrent loop subprocess below)

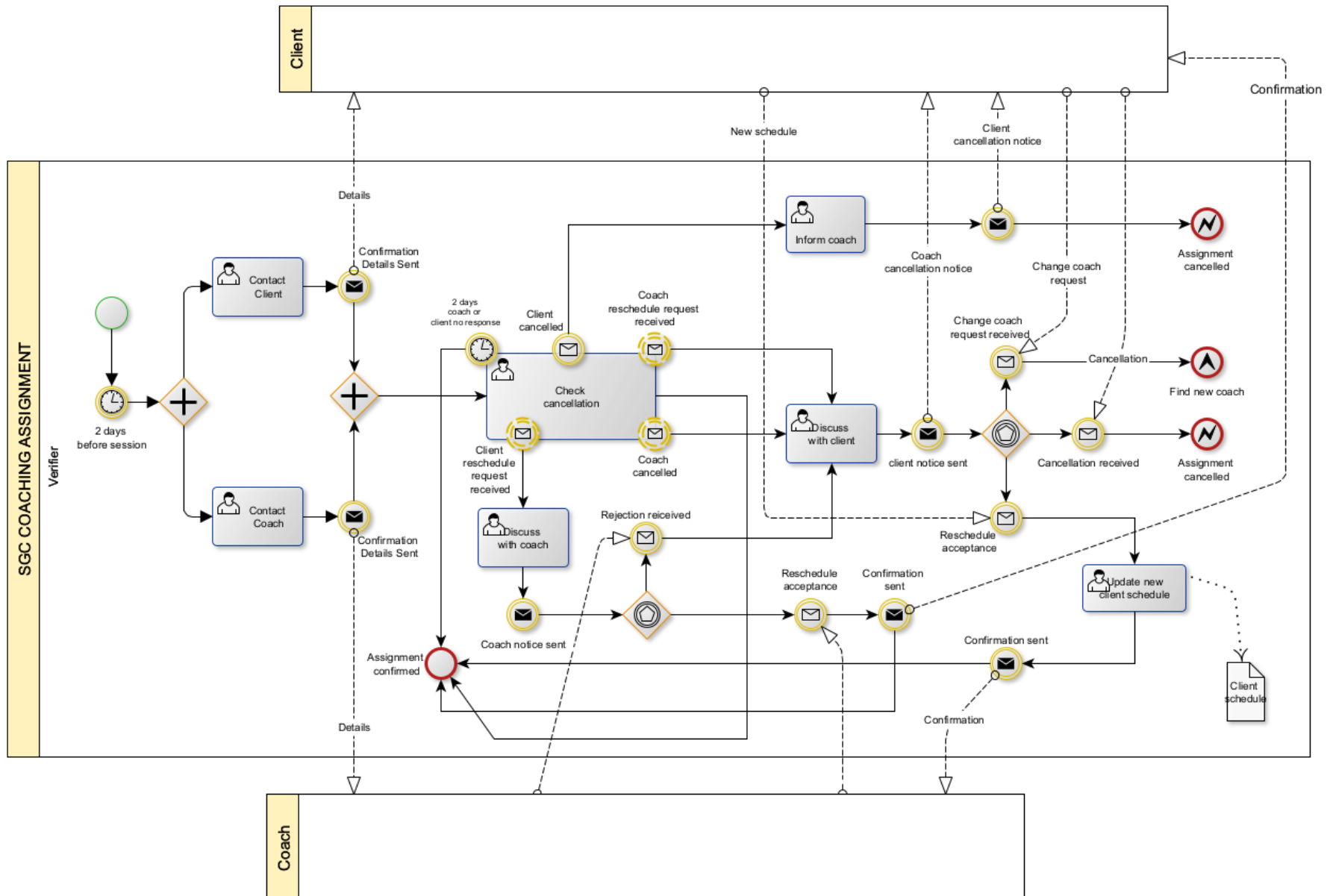
## 5. Conduct Recruitment Subprocess



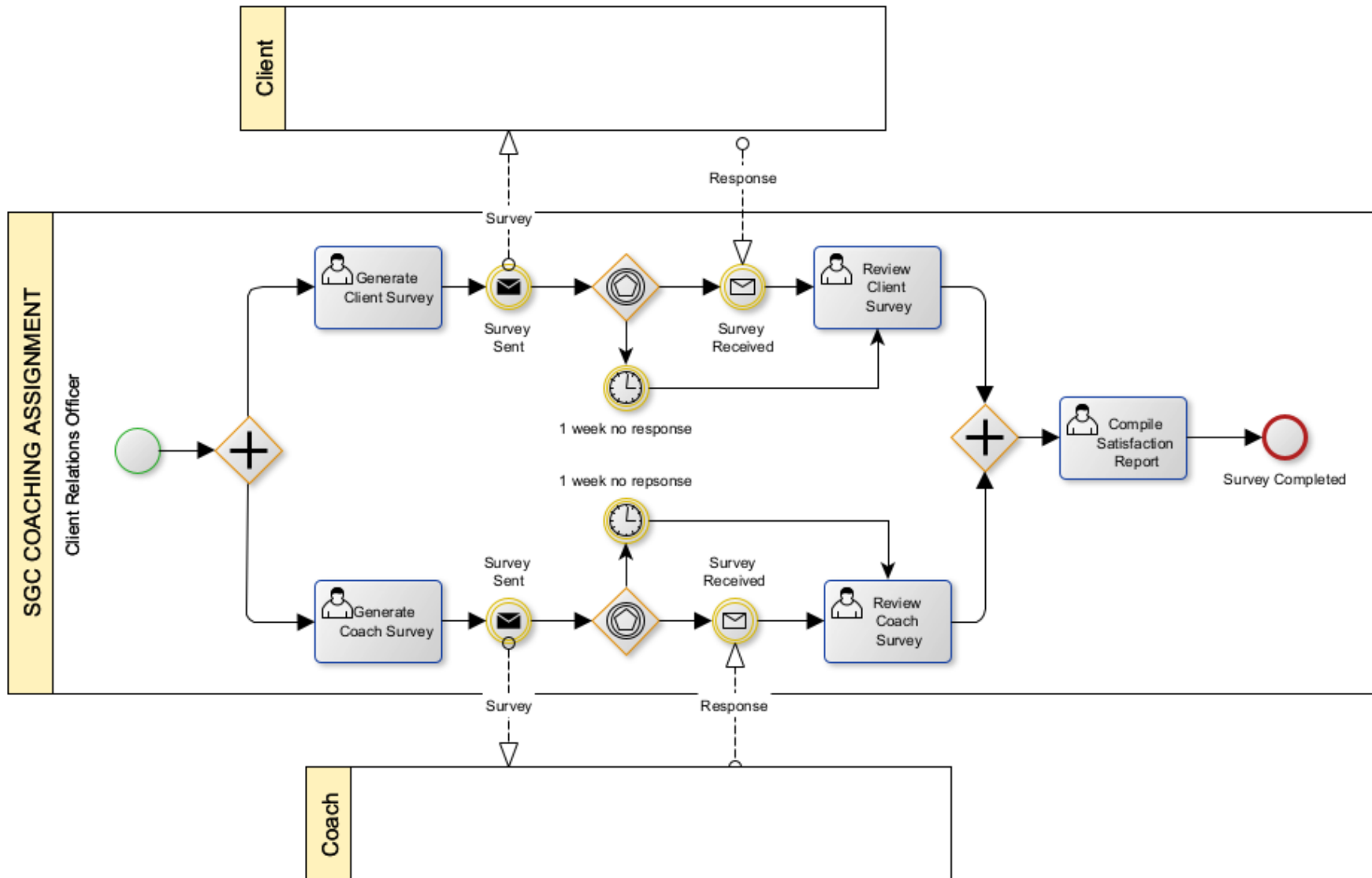
## 6. Schedule Assignment Subprocess



## 7. Verify Assignment Subprocess



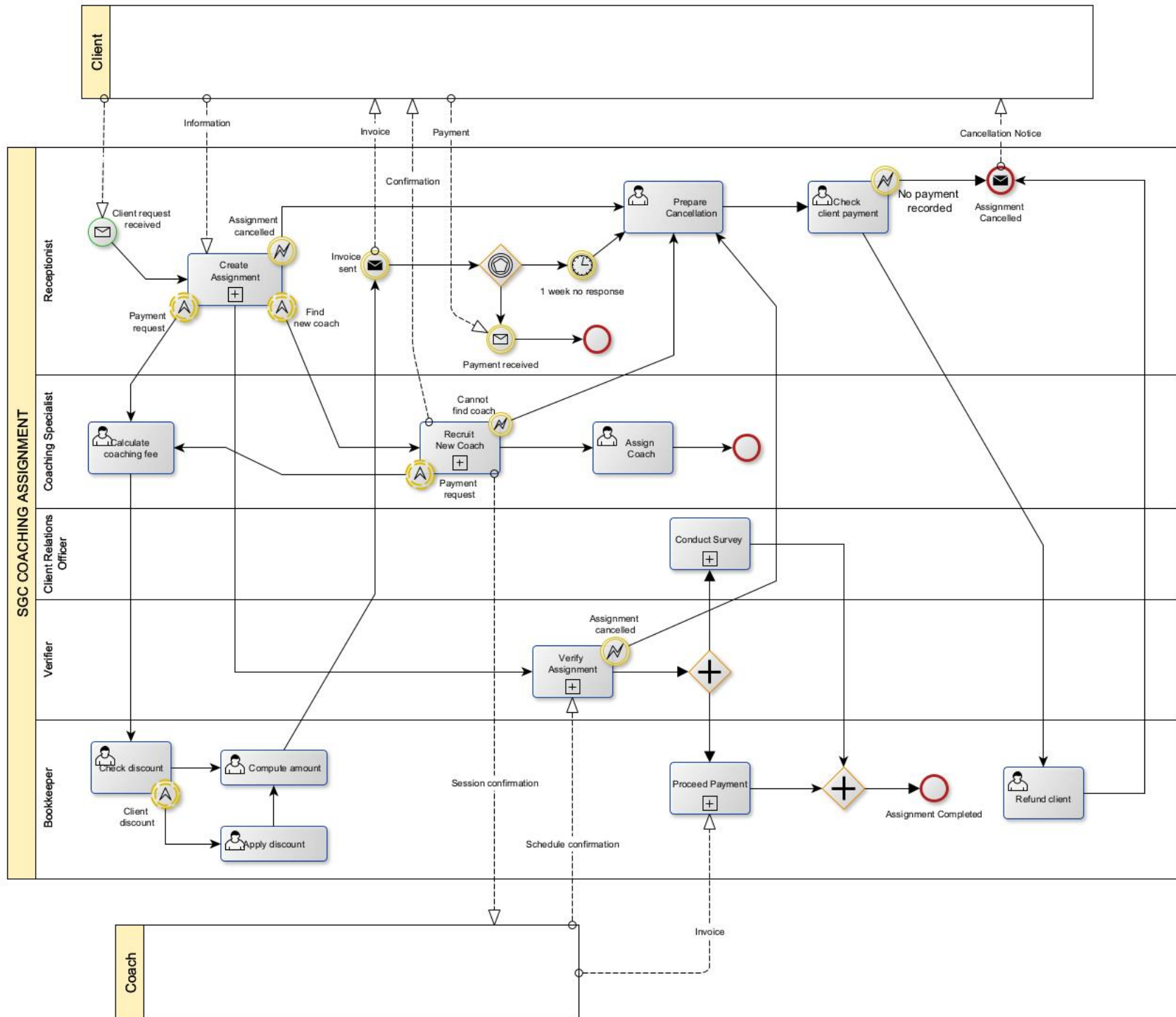
## 8. Conduct Survey Subprocess





## **Appendix 3: SGC To-Be Models**

### **1. Main Process**

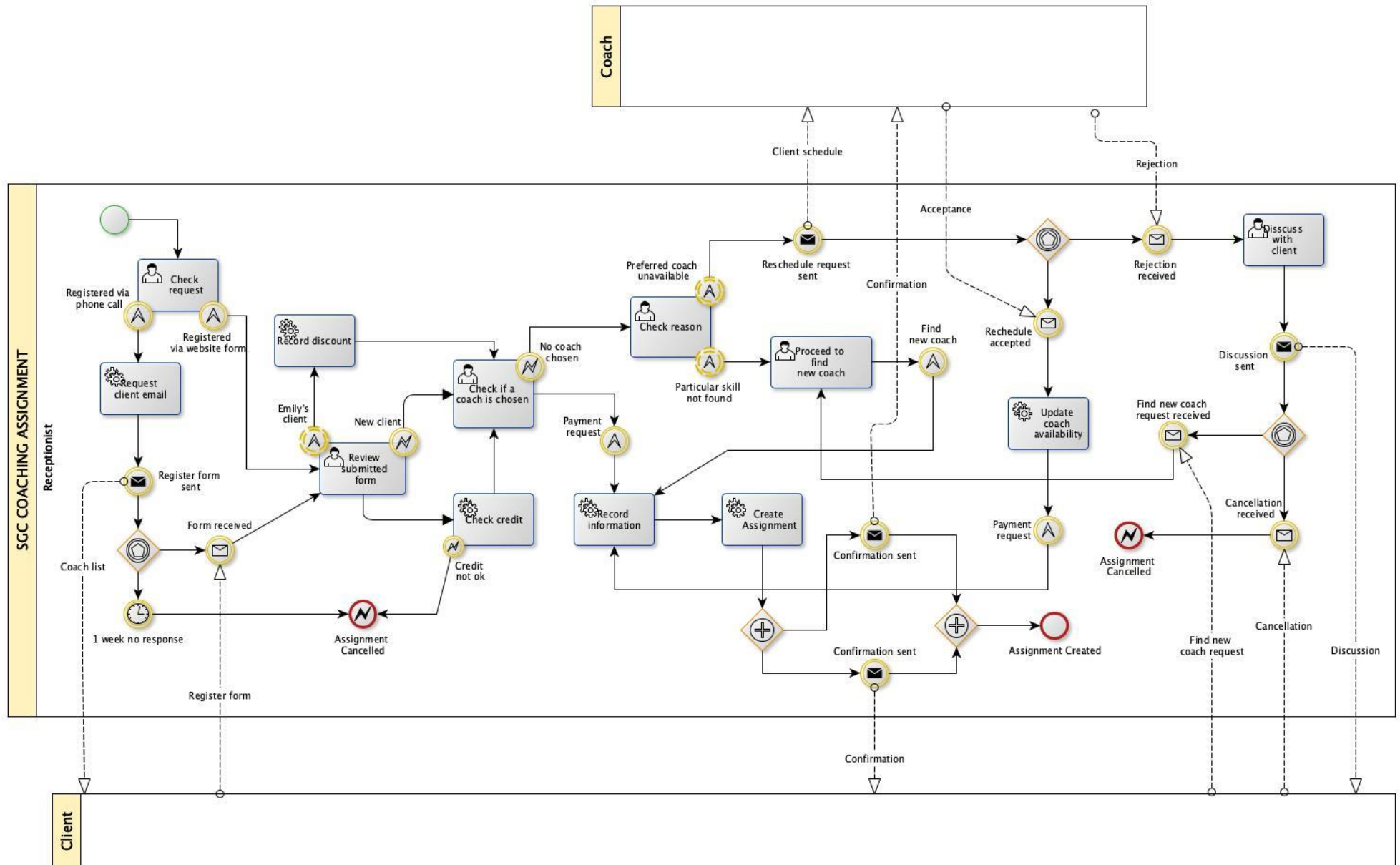




**Clarification:** The main process outlines the implementation of the prepayment solution. Before creating a new assignment, the coach specialist calculates the coaching fee and sends the details to the bookkeeper, who then computes the final amount. The receptionist verifies that the client has made the payment before proceeding to create the assignment.

If a client decides to cancel the assignment, the receptionist must first check whether any payment has been made. If a payment has been received, the bookkeeper will manage the refund process before the assignment is officially cancelled.

## 2. Create Assignment Subprocess

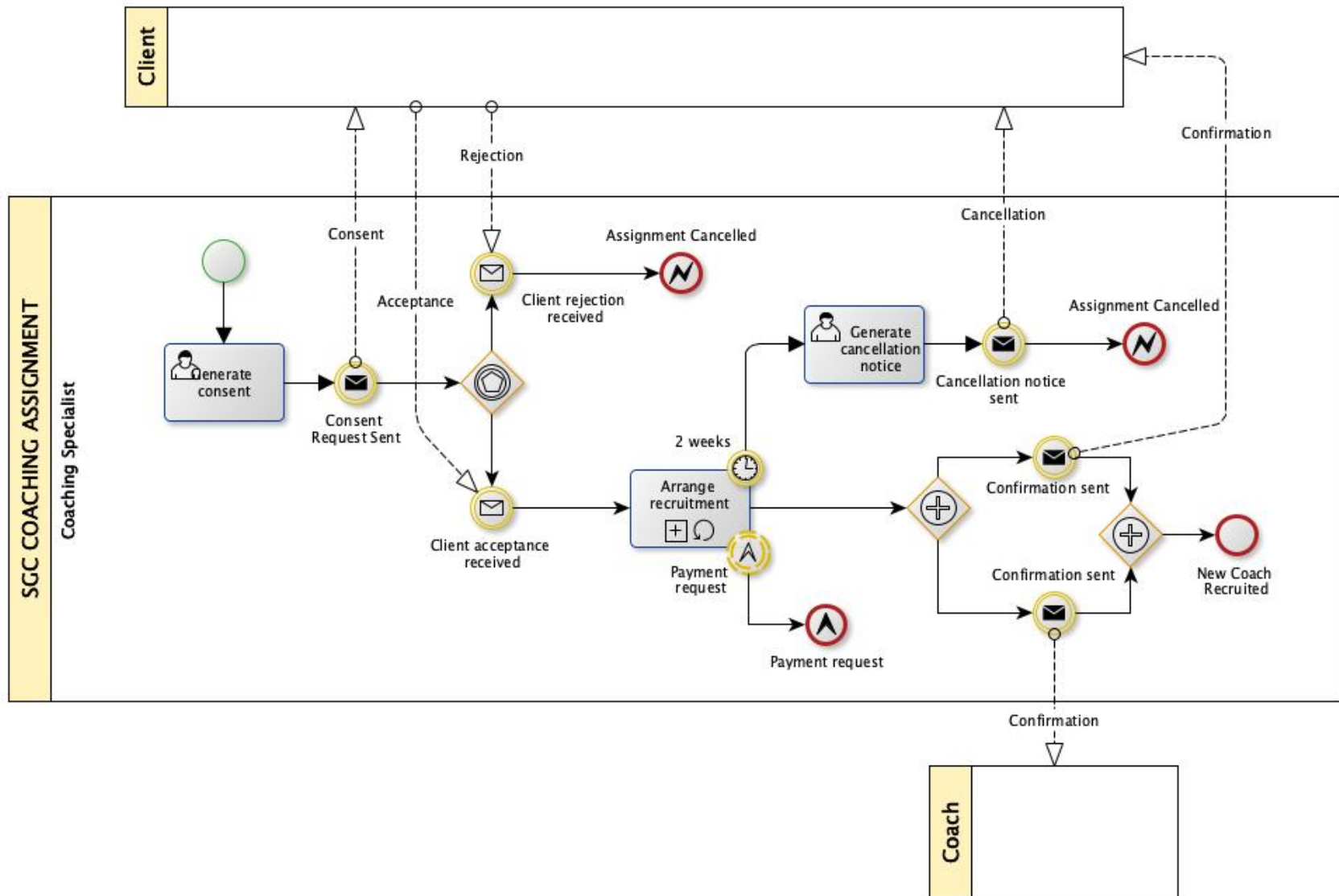


**Clarification:** With the implementation of a web registration form, the "Create Assignment" subprocess for SGC can be greatly streamlined. Initially, the receptionist will determine whether a client has registered through the web form or by phone. If the client calls, the receptionist will request their email address and send them a link to the registration form on the company's website. This approach ensures that all coaching sessions begin with a standardized registration form, allowing clients to select a suitable coach directly. This uniform method minimizes delays in scheduling and assigning coaches, creating a more efficient process. Following the client's submission of the form, the receptionist must confirm the accuracy of the submitted form.

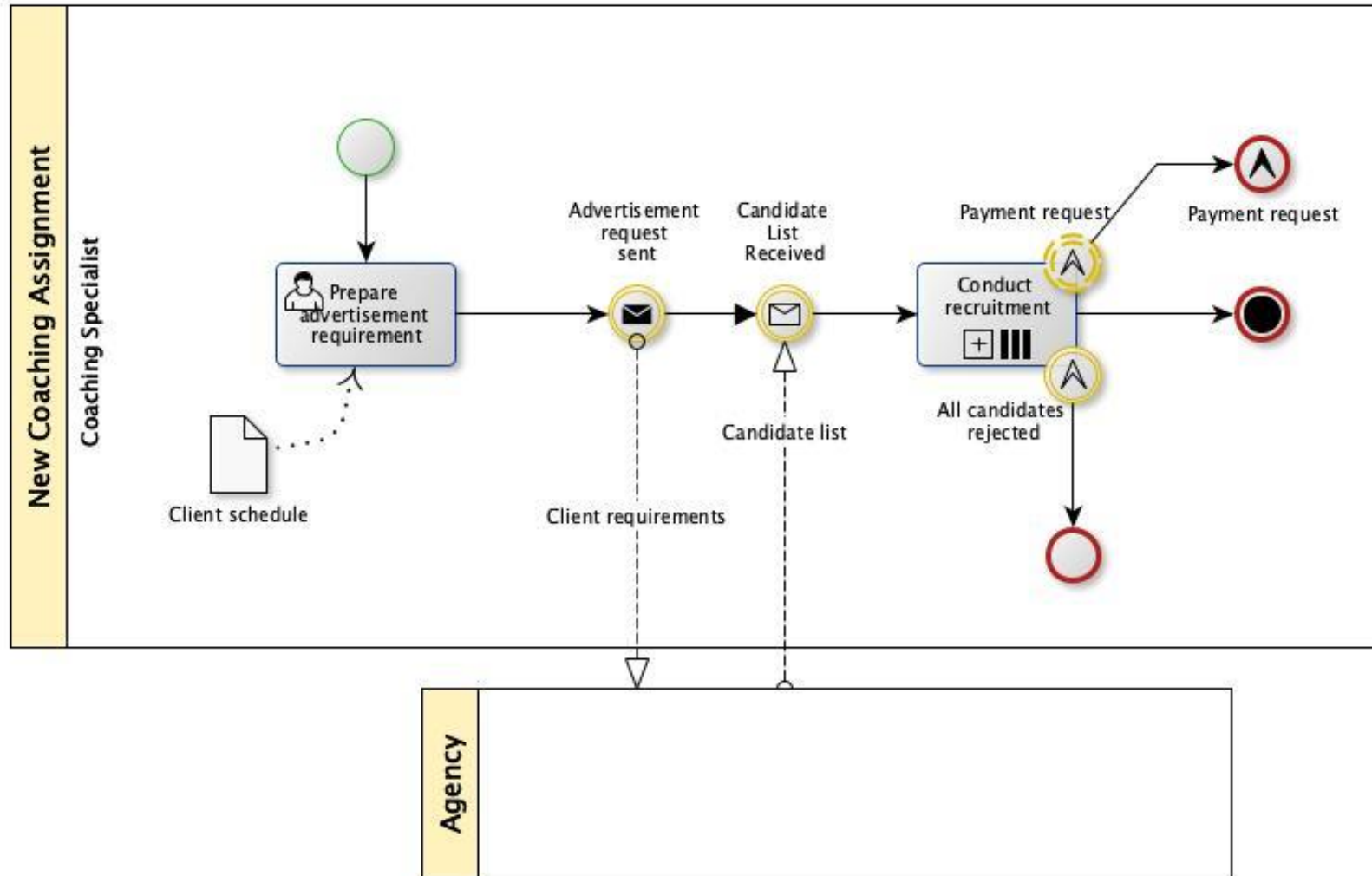
A key step in the process is "**Check if a coach is chosen**" when the client submits the form. This determines if the client has already chosen a coach, allowing the process to proceed smoothly. If no coach is selected, the receptionist checks reasons like skill mismatches or scheduling unavailability. The procedure then escalates to the proper flow, whether it's managing rescheduling, updating availability, or finding a new coach. Since tasks like managing rescheduling and updating availability are straightforward and involve sending communication messages rather than requiring domain expertise, we assigned these responsibilities to the receptionist. This approach reduces the workload of the coach specialist, who will focus solely on cases that involve **finding a new coach**.

To guarantee commitment and avoid delays, the model always requires payment before the assignment can be successfully created, which reflects our prepayment solution.

### 3. Recruit new Coach Subprocess

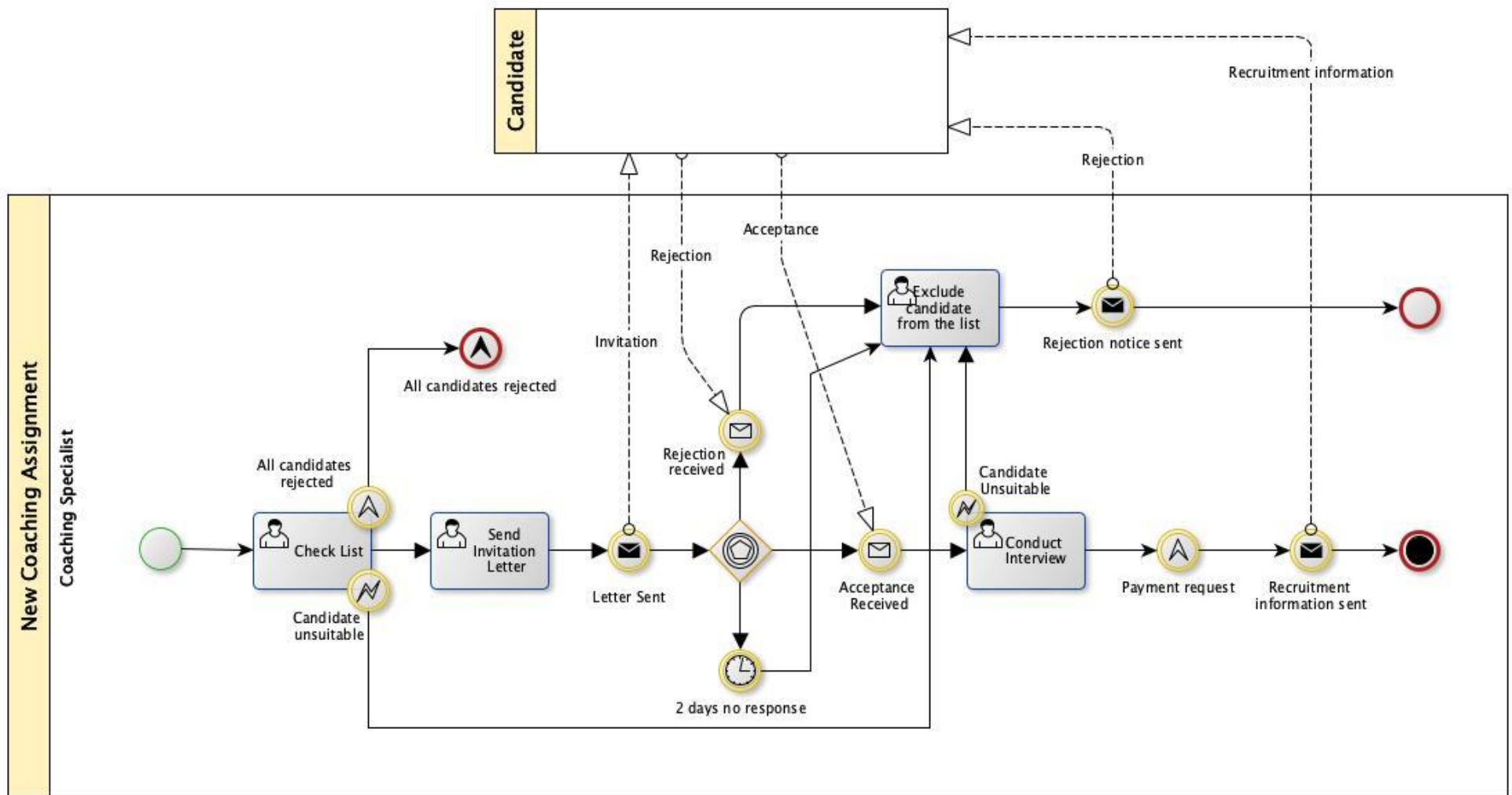


## 4. Arrange Recruitment Subprocess



**Clarification:** When preparing the advertisement request ready to be sent to the advertising agency, the coach specialist must prepare the client's schedule (which can be requested in the consent asking for hiring a new coach) and send it to the agency as a hiring requirement. This makes sure SGC only looks for candidates that have their schedule match with clients' schedule, which aligns well with our proposed solution addressing **Misaligned Hiring and Availability between Coach and Client** issue.

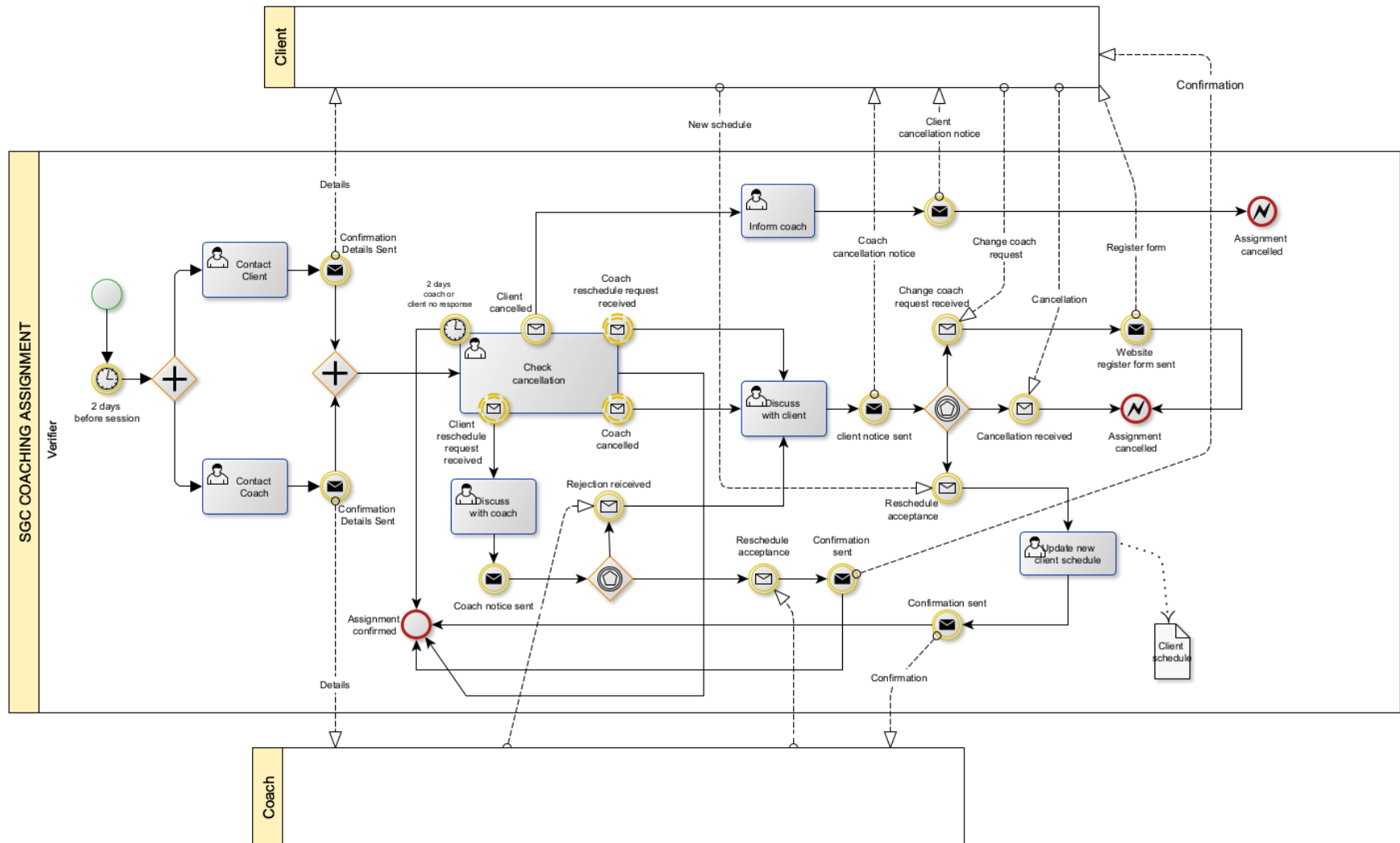
## 5. Conduct Recruitment Subprocess



**Clarification:** Following the interview, the customer is asked to pay in the "Conduct Recruitment" to-be subprocess before the coach is officially hired. This step is represented in the model by the "Payment Request" escalation event, which occurs after the "Conduct Interview" step. The coach is not officially hired until the money has been properly completed and the recruitment documents have been provided. By ensuring that all required payments are made before proceeding, this flow strengthens the prepayment solution and protects against any problems related to unpaid services.

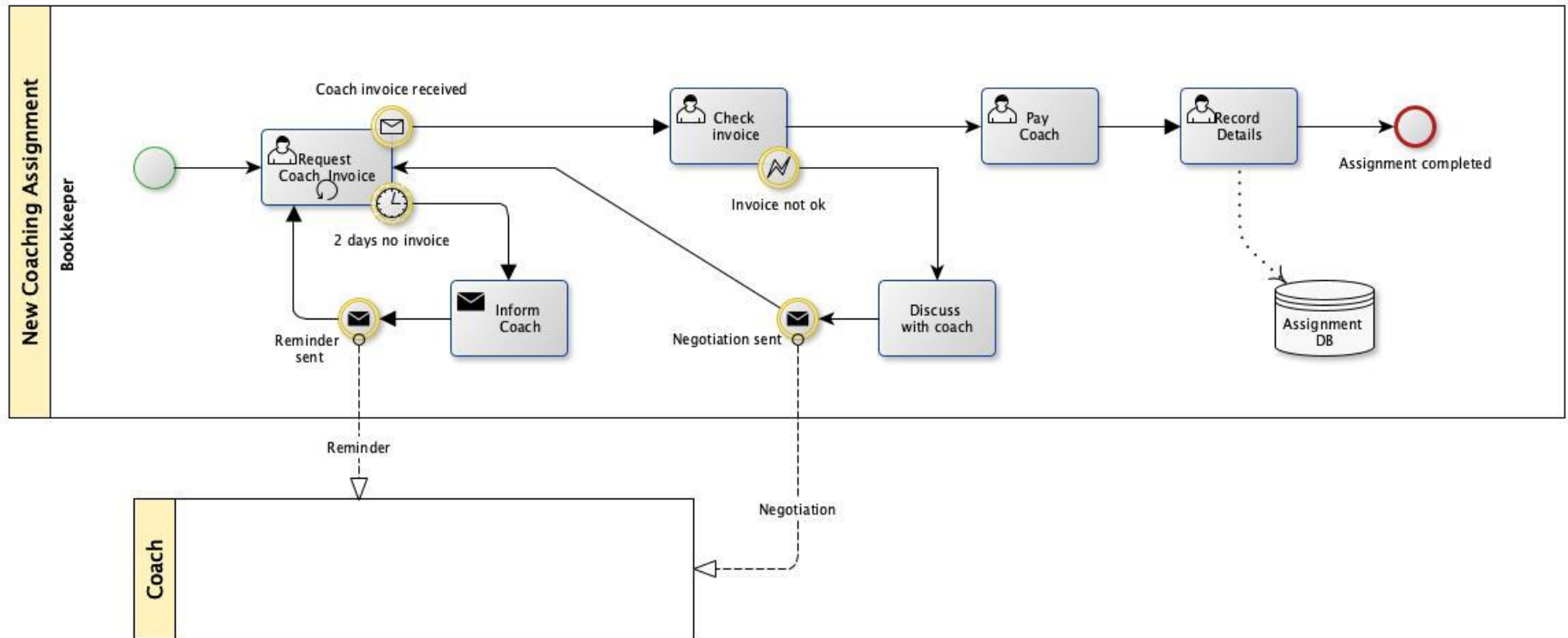


## 6. Verify Assignment Subprocess



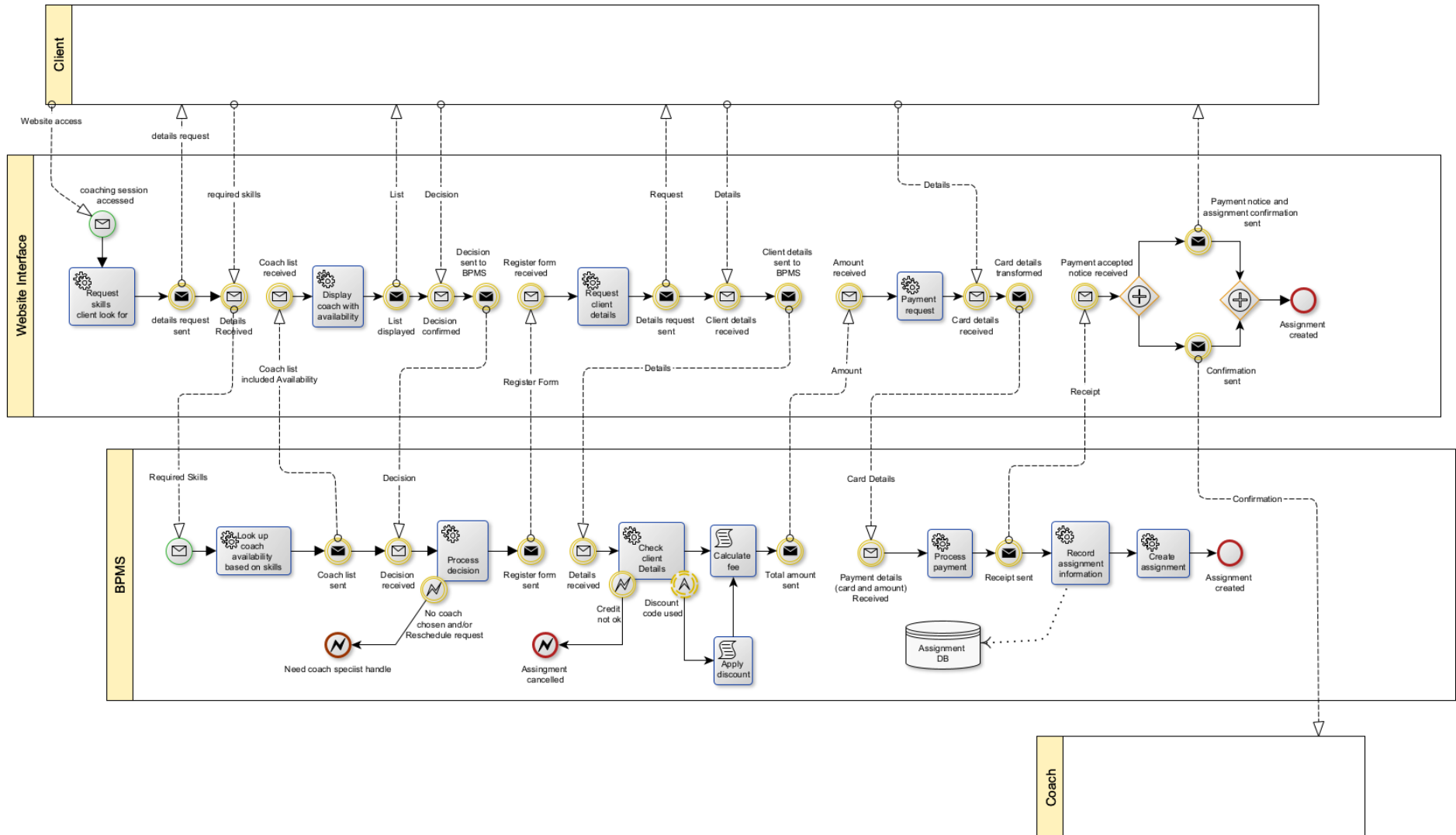
**Clarification:** In the Verification To-be subprocess, all tasks remain unchanged except for the “**Change Coach request received**” message event. After discussions with clients—whether the coach fails to confirm the assignment or requests a reschedule—if the client decides to switch to a new coach, the verifier will send them a link to the website registration form. The client will then complete the form, select a new coach, and submit it, eventually creating a new assignment. Therefore, the verifier will cancel the current assignment (where the client cannot find a coach) and the client will choose a new coach and submit a new form.

## 7. Proceed Payment Subprocess



**NOTE:** The **Conduct Survey** subprocess will remain unchanged, so we will not include it here. Please refer to the **Appendix 2 As-Is models** to look for the Conduct Survey subprocess.

## Appendix 4: SGC Automation Model



**Clarification:** We selected the “Create Assignment” subprocess for automation using BPMS. The automation begins when clients access the web form and specify the skill they wish to learn. The system then retrieves data from the coach database to find coaches who match the desired skill and displays a list of suitable coaches along with their availability, allowing clients to make their selection. Once a coach is chosen, the system sends the registration form, prompting clients to enter their personal details to register for the coaching session. The process is completed when the client successfully makes the payment.

If a client is unable to select a coach (by ticking a “cannot find a coach” checkbox on the website), the subprocess triggers the “Need coach specialist handle” ending error event, directing the task to a different process for further assistance.

## Appendix 5. Best Practices Summary

| Issue                                                                                                                     | Best Practice         | Application<br>Description and/or<br>Solution Explanation                                                                       | Advantages                                                                                           | Disadvantages                                                                                                                            |
|---------------------------------------------------------------------------------------------------------------------------|-----------------------|---------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Excessive<br/>Scheduling<br/>Delays Due to<br/>Redundant and<br/>Manual<br/>Coordination<br/>and<br/>Communication</b> | Contact<br>Reduction  | Reducing points of<br>contact and back-and-<br>forth communication<br>by allowing clients to<br>directly book their<br>sessions | The process can be sped<br>up, leading to a faster<br>resolution and improved<br>client satisfaction | Some clients may still<br>prefer direct<br>interaction with the<br>coach specialist for<br>assistance and<br>support                     |
|                                                                                                                           | Control<br>Relocation | Giving clients the ability<br>to choose their own<br>coach and schedule<br>their sessions                                       | Reduces the workload on<br>the coach specialist and<br>minimizes the risk of<br>scheduling conflicts | Not all clients may be<br>comfortable with this<br>level of autonomy,<br>particularly those<br>unfamiliar with self-<br>service systems. |

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|                                                                    | Activity<br>Automation  | Automating routine tasks such as updating coach availability, registering clients, and sending confirmations with RPA                                               | Minimizes time spent on routine administrative work and errors such as double-bookings, resulting in faster processing. | Requires initial investment in technology and training                                        |
| <b>Misaligned Hiring and Availability between Coach and Client</b> | Resequencing            | Checking the coach's availability at the beginning of the recruitment process. If there's a scheduling mismatch before hiring, the candidate will not be considered | Reduces delays, streamlines the process, and avoids post-hiring scheduling conflicts                                    | Might limit the candidate pool, as some skilled coaches may be unavailable at specific times. |
|                                                                    | Activity<br>Elimination | The coach and his client can move directly to the Verification stage, where both parties confirm their readiness for the session without the need of scheduling     | Makes the process faster and less complex                                                                               | May limit flexibility if a coach's availability changes to post-hiring                        |



|                                                        |                           |                                                                                                         |                                                                                      |                                                                                                         |
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| <b>Overlapped responsibility</b>                       | Split Responsibilities    | Tasks are clearly defined and assigned to specific actors to prevent overlapping or confusion           | Increases accountability and improves workflow by reducing overtasking and confusion | May lead to inflexibility, leading to potential delays if a staff member is unavailable                 |
|                                                        | Case Assignment           | Assigns one person to manage multiple stages of a client's journey, reducing task handovers             | Ensures continuity, improves client satisfaction, and minimizes communication gaps   | Can lead to delays if the assigned person is overloaded or unavailable                                  |
| <b>Delayed coach payments after service completion</b> | Knock-out                 | Implement a prepayment requirement during the client-coach matching stage to prevent non-payment issues | Ensures timely payment and reduces the risk of non-payment                           | May deter clients who prefer post-service payment, potentially reducing client engagement               |
| <b>Inefficient payment reminder process</b>            | Synchronous Communication | Utilize phone calls to achieve faster resolution, ensuring immediate attention                          | Improves client accountability, and increases the likelihood of timely payments      | Requires more staff time and resources, calling at inappropriate time might make customer uncomfortable |

|                                                         |         |                                                                                                      |                                                                                         |                                                                                                     |
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| <b>Unnecessary manager involvement in debt recovery</b> | Empower | Delegate the responsibility of selling unpaid invoices to a debt collection agency to the bookkeeper | Streamlines the process, reducing delays and freeing up the manager for strategic tasks | Requires training and oversight to ensure the bookkeeper can handle this responsibility effectively |
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