Process Identification and Documentation Workshop
Org B

Our Understanding of the Current Processes at Org B

Stage1 :Data Collection and Storage

Who is involved?
Organization A and Organization B.

Who does what?
Organization A sends a customer list to Organization B through the use of a shared drive. These are customers who would have interacted with the Org A within a specified time period.
Org B then dedupes (cleans the data for duplicates, missing or blacklisted records etc.) using an internally developed platform.

Are there any interfacing systems?
The cleaned file is then loaded onto a S1 system for call centre dialling. Interviews are then done telephonically, and responses are captured onto the S1 system.

What are the pain points?
No pain points at this stage

Stage 2: Data Aggregation / Consolidation

Who is involved?
IT Department of Org B.

Who does what?
The data is then downloaded form the S1 System platform and sent to IT. IT then loads certain components of the data (open ended questions/ comments) onto an editing system that was internally developed. On the editing system, there are various stages involved. First the comments are proofread and edited for grammar etc. Second the comments are coded for ease of analysis. Also, responses that need to be translated are translated into English. On the same system, backchecking of answers that do not make sense is done wherein respondents are called or recordings from the call centre are listened to and answers that do not make sense are corrected. The data is then downloaded in SPSS or csv format.

Are there any interfacing systems?
Tables are then run using wincross. Excel is also used to create tables from which data is captured into PowerPoint.

What are the pain points?
Combining data from different projects into one data set as some of the questions are not similar across projects.

Stage 3: Reporting

What levels of automation

Current scores are moved manually into PowerPoint reports to trend the scores. There is no automation because:
i)   The client regularly requests changes to be made on the reports
ii)   The quality of formatting required is high and its better to capture new scores than generate a new report that will need to be formatted again.

Our Understanding of the Current Processes at Org B

Stage1 :Data Collection and Storage

Org A Channels of Service
- Creation of Record of service delivery to client
- Storage or Record of service to client.

Org B
- Collection / Receipt of data from the Org A Channel of Services Storage.
- Capture Satisfaction Survey Information from recipients of services from the Org A's Channels of Service.
- Store Satisfaction Survey Data.

Stage 2: Data Aggregation / Consolidation

Org B IT Dept.

- Retrieve Satisfaction Survey Data from Storage.
- Organise Data and Produce Worksheets
- Produce Consolidated Manco Worksheet

Stage 3: Reporting

Org BReporting Staff

- Design PowerPoint Reporting Templates
- Produce PowerPoint Report using Manco Work Sheet Data

Who is involved? Who does what? Are there any interfacing systems? What are the pain points?

Who is involved? Who Does what ? Do you use other systems other than Excel? What are the pain points?

What levels of Automation?

Process Identification Workshop Template

Category	Details
Description	Capture Information about Customers / Clients (who interact with the Org A's Channel Of Service)
Department/ Organization	The Org A Channel Of Service
Triggered By	Customer /Client (Request For Service through Org A Channel of Service)
Frequency	Daily (every working day)
Applications	
High Level Steps and Actors / Implementors	1. Client Checks in at Org A Channel Of Service Center 2. Org A Customer / Client Service Staff record Customer / Client Details including details of requested / service 3. Org A Subject Matter Expert delivers service to client 4. Client / Customer records are updated on delivery of service
Team Size	
Process Duration	N/A
Process Inputs	Client Request For Service
Process Outputs	

Category	Scoring
Environment Complexity	
Process Characteristics	
Data Quality	
STP	

Automation Potential

NOTES	

Process Identification Workshop Template

Category	Details
Description	Upload File of Details of Clients/ Customers served at the Org A Channel Of Service
Department/ Organization	The Org A Channel Of Service
Triggered By	Time of Day or Date of week/month/ year or File full Or File Ready For Processing Notice
Frequency	Daily/Weekly/ Monthly/ Yearly /Mutually agreed (The files have 3 different frequencies. (i) Three times a week i.e. Monday, Wed & Frid) (ii) Once a week i.e. Mon (iii) Once in four months.
Applications	Shared Storage System
High Level Steps and Actors / Implementors	1. Org A Staff Check Client/Customer File 2. Org A Staff Upload Client File onto the Shared Drive Service. (The Org A sends an email notifying that files have been dropped on the shared drive or delayed. (Files that are received 3 times a week have an interaction/ transaction date of past 2 days. Those that are received once a week have transactions done in the past week. Those that are received once a month are not time based.
Team Size	
Process Duration	
Process Inputs	File of Client/Customer Details
Process Outputs	File Stored on shared drive (What Format: They are Excel files)

Category	Scoring
Environment Complexity	
Process Characteristics	
Data Quality	
STP	

Automation Potential

NOTES

Process Identification Workshop Template

Category	Details
Description	Download File of Details of Clients/ Customers who interacted with Services Unit at the Org A Channel Of Service from the shared drive
Department/ Organization	Org B
Triggered By	Date of week/month/ year; File Ready Notice (Receipt of a file from the Org A)
Frequency	End Of Day/Week/ Month/ Year / Mutually agreed (As frequently as the files come from Org A, 3 times a week, once a week, once in 4 months)
Applications	Shared Storage System Local Storage
High Level Steps and Actors / Implementors	1. Org A staff download Client / Customer List file from shared storage Q. We have a number of project managers who manage the projects for the different files. But only 3 managers communicate with the client and receive the files and send them to the rest of the managers and the call centres.
Team Size	
Process Duration	TBA
Process Inputs	File Of Client Details on shared Storage System
Process Outputs	Local (to Org B) Copy of Client Details File

Category	Scoring
Environment Complexity	
Process Characteristics	
Data Quality	
STP	

Automation Potential

NOTES	

Process Identification Workshop Template

Category	Details
Description	Data De-duplication and cleansing
Department/ Organization	Org B IT Department
Triggered By	Date of week/month/ year , Receipt of Notice of File Ready For processing **(Triggered by receipt of a file)**
Frequency	End Of Day/Week/ Month/ Year **(As frequently as the files come from the Org A, 3 times a week, once a week, once in 4 months)**
Applications	Local Storage System Internal De-duplication Application
High Level Steps and Actors / Implementors	1. Remove duplicates etc. **(Each customer in the files is identified by a customer number. A duplicate will be a customer number that appears more than once in the same file or is found in another file as well. Customers that refuse to participate are removed from future files and those that successfully does an interview should not be interviewed again, at least not in the next 30 days).**
Team Size	
Process Duration	N/A
Process Inputs	Data File of clients/customers who interacted with the Org A Channel Of Service
Process Outputs	Clean File of Clients/ Customers **(The output is just a cleaned file to be loaded for dialling in the call centre. The file that Palesa has is the output after interviews have been done)**

Category	Scoring
Environment Complexity	
Process Characteristics	
Data Quality	
STP	

Automation Potential

NOTES	

Category	Details
Description	Upload Clean File of Clients/ Customers who interacted with the Org A Channel Of Service into the S1 system
Department/ Organization	Org B
Triggered By	Completion of File Cleaning Process ; end of day/week/month/ year ; File Ready Notice (Completion of the file cleaning process, yes)
Frequency	End Of Day/Week/ Month/ Year (There are agreed dates to start using the files. Usually a file that comes must start to be used the following day.)
Applications	Local File Storage System. S1 System
High Level Steps and Actors / Implementors	
Team Size	
Process Duration	
Process Inputs	Clean Client File
Process Outputs	Updated S1 System Database

Category	Scoring
Environment Complexity	
Process Characteristics	
Data Quality	
STP	

Automation Potential

NOTES	

Category	Details
Description	Conduct Interviews / Surveys and collect data
Department/ Organization	Org B
Triggered By	Upload of clients file into S1 System. File Ready Notice (Once the interview is complete in the call centre; full complete interview, phone down)
Frequency	Daily/Weekly/Monthly (Interviews are completed daily. We don't work on Sundays. We don't do Business type 1 interviews on Saturdays.)
Applications	S1 System PABX System
High Level Steps and Actors / Implementors	1. Conduct Interviews (Telephonically and face-to-face using tablets – but let's focus on the ones done telephonically for now.) 2. Record Interview Results in S1
Team Size	
Process Duration	
Process Inputs	Clean Client Records in S1 System
Process Outputs	Updated S1 System Database

Category	Scoring
Environment Complexity	
Process Characteristics	
Data Quality	
STP	

Automation Potential

NOTES	

Category	Details
Description	Download Interviews Data from S1 System
Department/ Organization	Org B
Triggered By	End of Day/Week/Month/Year; Notice Of Completion of Interviews / Survey. (Once the interview is complete in the call centre; full complete interview, phone down)
Frequency	Daily/Weekly/Monthly/ Yearly; on completion of interviews (Daily)
Applications	S1 System PABX System
High Level Steps and Actors / Implementors	1. Close Interviewing Process 2. Download Interview Results from S1
Team Size	
Process Duration	
Process Inputs	S1 System Database with Interview Results
Process Outputs	Downloaded Interviews Data (The files are downloaded in SPSS but can be downloaded in Excel. The files are ready to be cleaned. They don't yet map to the file Palesa has)

Category	Scoring
Environment Complexity	
Process Characteristics	
Data Quality	
STP	

Automation Potential

NOTES	

Category	Details
Description	Combining Data Sets into one file
Department/ Organization	Org B IT Department
Triggered By	End of Day/Week/Month/Year; Notice Of Completion of Interviews / Survey; Notice of availability of Interviews Data Sets (The call centre is informed by N1 System once a set target of interviews have been completed and they then send that data to the Data Processing dept)
Frequency	Daily/Weekly/Monthly/ Yearly; on completion of interviews (Daily)
Applications	S1 System PABX System
High Level Steps and Actors / Implementors	1. Close Interviewing Process 2. Extract Relevant Data fields 3. Proof Read Interview comments make corrections 4. Code Comments in data 5. Correlate comments with scores i.e. Correct Comments not making sense 6. Combine the datasets
Team Size	
Process Duration	
Process Inputs	System Database with Interview Results
Process Outputs	Processed Interviews Data (Data is in SPSS but can be available in CSV/Excel or Softcopy format)

Category	Scoring
Environment Complexity	
Process Characteristics	
Data Quality	
STP	

Automation Potential

NOTES	

Process Identification Workshop Template

Category	Details
Description	Produce Excel Tables
Department/ Organization	Org B IT Department
Triggered By	End of Day/Week/Month/Year; Notice Of Completion of Data Processing (Completion of the coding process for all interviews for that project)
Frequency	Daily/Weekly/Monthly/ Yearly; on completion of Data processing (Once in 4 months)
Applications	S1 System Org B S2 System Microsoft Office
High Level Steps and Actors / Implementors	1. Run UTILITY WINCROSS
Team Size	
Process Duration	
Process Inputs	Processed Data (From Org B Unit)
Process Outputs	Excel Tables (In Excel as per the file name)

Category	Scoring
Environment Complexity	
Process Characteristics	
Data Quality	
STP	

Automation Potential

NOTES	

Process Identification Workshop Template

Category	Details
Description	Produce PowerPoint Report
Department/ Organization	Org B Reporting
Triggered By	End of Day/Week/Month/Year; Notice Of Completion of Production of Excel Tables (Completion of Excel Tables)
Frequency	Daily/Weekly/Monthly/ Yearly; on completion of production of Excel Tables. (Once in 4 months)
Applications	Microsoft Office
High Level Steps and Actors / Implementors	1. Run UTILITY WINCROSS
Team Size	
Process Duration	
Process Inputs	Excel Tables
Process Outputs	PowerPoint Report

Category	Scoring
Environment Complexity	
Process Characteristics	
Data Quality	
STP	

Automation Potential

NOTES	

Category	Details
Description	Distribute PowerPoint Report
Department/ Organization	Org B Reporting
Triggered By	End of Day/Week/Month/Year; Notice Of Completion of Production of PowerPoint Report (Completion of PowerPoint report compilation)
Frequency	Daily/Weekly/Monthly/ Quarterly Yearly; on completion of production of PowerPoint Report. (Once in 4 months)
Applications	Microsoft Office Email Internal Data Shared Service
High Level Steps and Actors / Implementors	
Team Size	
Process Duration	
Process Inputs	PowerPoint Report
Process Outputs	Comments/Acknowledgements

Category	Scoring
Environment Complexity	
Process Characteristics	
Data Quality	
STP	

Automation Potential

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