



Leveraging Technical Communication into a Process Improvement Career

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Agenda

- The Demand for Quality System Credentials
- Why Technical Communicators Excel at Process Improvement
- What It Takes to Make This Career Move
- How to Lead Your Management
- Becoming a Project Manager
- The Path to Process Improvement Success
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- Conclusion and References

The Demand for Quality System Credentials

- Federal sector Requests for Proposals (RFPs) are increasingly requiring compliance to models/standards
- Provides a competitive advantage for business-to-business companies
- Seen as minimizing risk that supplier won't deliver a quality product on time
- Various quality models/standards include:
 - CMMI
 - 6 Sigma
 - ISO 9000 series
 - ITIL

The Demand for Quality System Credentials, cont.

Quality Models and Standards:

- Bestow “certification” on organizations or “assessment” that proclaims the successful satisfaction of explicitly defined criteria that:
 - Are non-intuitive
 - Use common terms in unique or specific ways
 - Force heavy “burden of proof” on organization
- Require skillful communicators to interpret the criteria, and then refine and/or develop processes to achieve the desired credential

Why Technical Communicators Excel at Process Improvement

- Ability to communicate leaving no room for misinterpretation:
 - Logical organization
 - Appropriateness to audience
 - Consistent use of terms
 - Sufficient information for reader's needs
- Ability to probe for missing information
- Ability to capture and document information at the appropriate level of granularity

Why Technical Communicators Excel at Process Improvement, cont.

- Ability to remove barriers to information absorption and comprehension:
 - Consistency in formatting, terminology, documentation conventions
 - White space, “busyness”, density of content
 - Active vs. passive voice
- Training skills to aid in culture shift
- Tenacity to pursue accurate, complete, clear communication



What It Takes to Make This Career Move

In addition to good Technical Communicator skills, a career in managing process improvement efforts requires:

- Political skills
- Motivation / Self-Direction
- Thick Skin
- Pragmatism

What It Takes to Make This Career Move, cont.

■ Political skills:

- Obtaining cooperation from others with conflicting priorities
- Navigating and tactfully negotiating across the entire organization, which may include multiple political environments
- Developing an understanding of the various process practitioners' perspectives



What It Takes to Make This Career Move, cont.

■ Motivation / Self-Direction:

- Moving outside our comfort zone
- Learning others' jobs well enough to map their activities to process improvement goals
- Pressing on with little management support
- Fighting against the inertia of the status quo
- Learning on the job in a very public role

What It Takes to Make This Career Move, cont.

■ Thick Skin:

- Before, as long your communication deliverables were good, you were golden
- Now, *your job* is to get others up to par, in terms of the quality standard or model
- *Even management* needs to be told / shown where they can improve!
- Don't expect a welcome wagon

What It Takes to Make This Career Move, cont.

■ Pragmatism:

- Accepting that “good enough for now”, at first, can achieve the goal (mindful of “big picture”)
- Letting practitioners have ownership of their processes
- Figuring out how to motivate others to cooperate
- Figuring out how to learn what you need to know to lead the effort



How to Lead Your Management

At the outset, Management may:

- Not know what quality model or standard they want/need to pursue to better position the company for success
- Know what they want/need, but not know how to get there
- Know what they want/need, and *think* they know what it will take to get there

How to Lead Your Management, cont.

- If management doesn't know what they want:
 - Learn the industry's views on what quality systems or models are necessary / marketable
 - Learn the organization's goals, strengths and weaknesses in light of the industry's preferred quality system or model
 - Prepare a proposal for management showing how you can make it happen

How to Lead Your Management, cont.

- If management doesn't know how to get where they want:
 - Learn about the quality standard / model chosen
 - Analyze the likely obstacles in your organization
 - Plan to address potential issues effectively
 - Prepare a proposal for management showing how you can make it happen; don't bluff on the timeline!

How to Lead Your Management, cont.

- If Management knows what they want:
 - Discuss timeline they have in mind, and how they arrived at it
 - Discuss whether they've considered the budget for the project; if they have a budget, discuss how it was formulated
 - Offer to prepare a project plan to validate their timeline and budget
 - Offer to lead the project based on your *realistic* plan



Becoming a Project Manager

- Why do you need to become a PM?
 - Nothing happens without a plan!
 - Applying disciplined project management shortens implementation time for process improvement efforts
 - It will help you to manage the risks inherent in instituting cultural change
 - Managing to a well-defined project plan is fundamental to most quality standards

Becoming a Project Manager, cont.

Where do project schedules come from?

ID	Task Name	Start	Finish	Duration	Actual Start	% Complete	Actual Finish	Resource Names	May 7 2006								
									8	9	10	11	12	13	14	15	
1	Assess and define process set	5/8/2006	5/8/2006	1d	5/8/2006	0%	5/8/2006		█								
2	Establish baseline processes	5/9/2006	5/9/2006	1d	5/9/2006	0%	5/9/2006			█							
3	Roll out and collect measures	5/10/2006	5/12/2006	3d	5/10/2006	0%	5/12/2006				█	█	█				
4	Practice and improve	5/12/2006	5/16/2006	3d	5/12/2006	0%	5/16/2006						█	█	█	█	
5	Prepare for audit	5/15/2006	5/16/2006	2d	5/15/2006	0%	5/16/2006										█

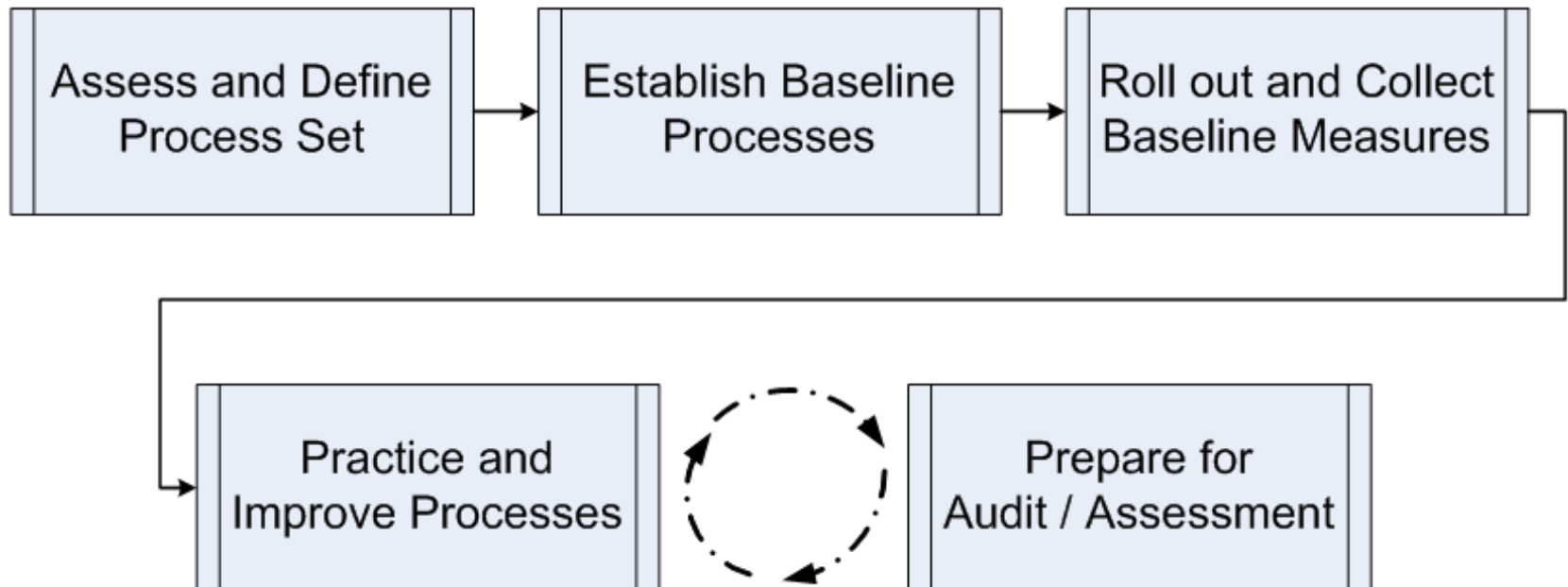
- List of tasks: Work Breakdown Structure (WBS)
- Level of effort for each task (in time)
- Resource assignment
- Sequence of tasks, especially “Critical Path”

Becoming a Project Manager, cont.

- A complete project plan for a quality/process improvement project addresses:
 - Schedule
 - Risks
 - Data management
 - Resources
 - Progress reporting
 - Training
 - Communication plan
 - Management involvement
 - Stakeholder involvement
 - Performance measurement
- The project plan provides a road map from initial analysis all the way to a successful certification or assessment

The Path to Process Improvement Success

- All process improvement projects can be managed via 5 activity phases:



The Path to Process Improvement Success, cont.

- I – Assess and Define Process Set:
 - Capture current process activities (as-is)
 - Gap Analysis: Assess current processes against quality model or standard
 - Identify each process to be defined/reworked:
 - What will it be called?
 - What group of activities will it cover?
 - Who will perform the process?
 - How does it relate to the others?
 - Develop Action Plan

The Path to Process Improvement Success, cont.

- II – Establish Baseline Processes:
 - Include roles, steps, inputs, and outputs
 - Develop templates to promote consistent outputs and to ease transition to new processes
 - Overcome practitioner resistance by promoting participation and “ownership”
 - Use visual aids, such as flow charts, to develop and refine process definitions

The Path to Process Improvement Success, cont.

- II – Establish Baseline Processes, cont.:
 - Build scalability into documented processes
 - Establish an official repository for all process artifacts: promotes version control and good “configuration management”
 - Establish the foundation for ongoing review and improvement of processes:
 - Requirement of most quality standards
 - Increases benefits to organization

The Path to Process Improvement Success, cont.

- III – Roll Out & Collect Baseline Measures:
 - Engage in communication campaign to inform teams of coming processes – focus on benefits
 - Ensure management visibility, including stated intentions of support and commitment
 - Involve process “owners” – senior practitioners – in the roll out of their process areas
 - Incorporate incentives for implementation / compliance

The Path to Process Improvement Success, cont.

- III – Roll Out & Collect Baseline Measures, cont.:
 - Conduct formal training:
 - Use visual aids to “step through” new processes
 - Train on infrastructure: process assets repository, ongoing improvement mechanisms, etc.
 - Measure process performance to determine improvement opportunities

The Path to Process Improvement Success, cont.

- IV – Practice and Improve Processes:
 - Enact the plans for ongoing review and improvement:
 - Audit practitioners on process compliance; escalate non-compliance issues, if necessary
 - Continue to measure process performance, and analyze against baseline measurements
 - Address process improvement recommendations and suggestions from practitioners
 - Evaluate effectiveness of training for new and existing employees; revise as necessary

The Path to Process Improvement Success, cont.

- V – Prepare for Audit / Assessment:
 - Manage this as a sub-project!
 - Work with actual assessor / auditor, if possible to minimize risk of failure
 - After the audit comes the operational stage:
 - Consistently work to improve and “optimize” the processes
 - Always prepare for further audits / assessments
 - There are always further quality standard goals or improvements to be made!

The Path to Process Improvement Success, cont.

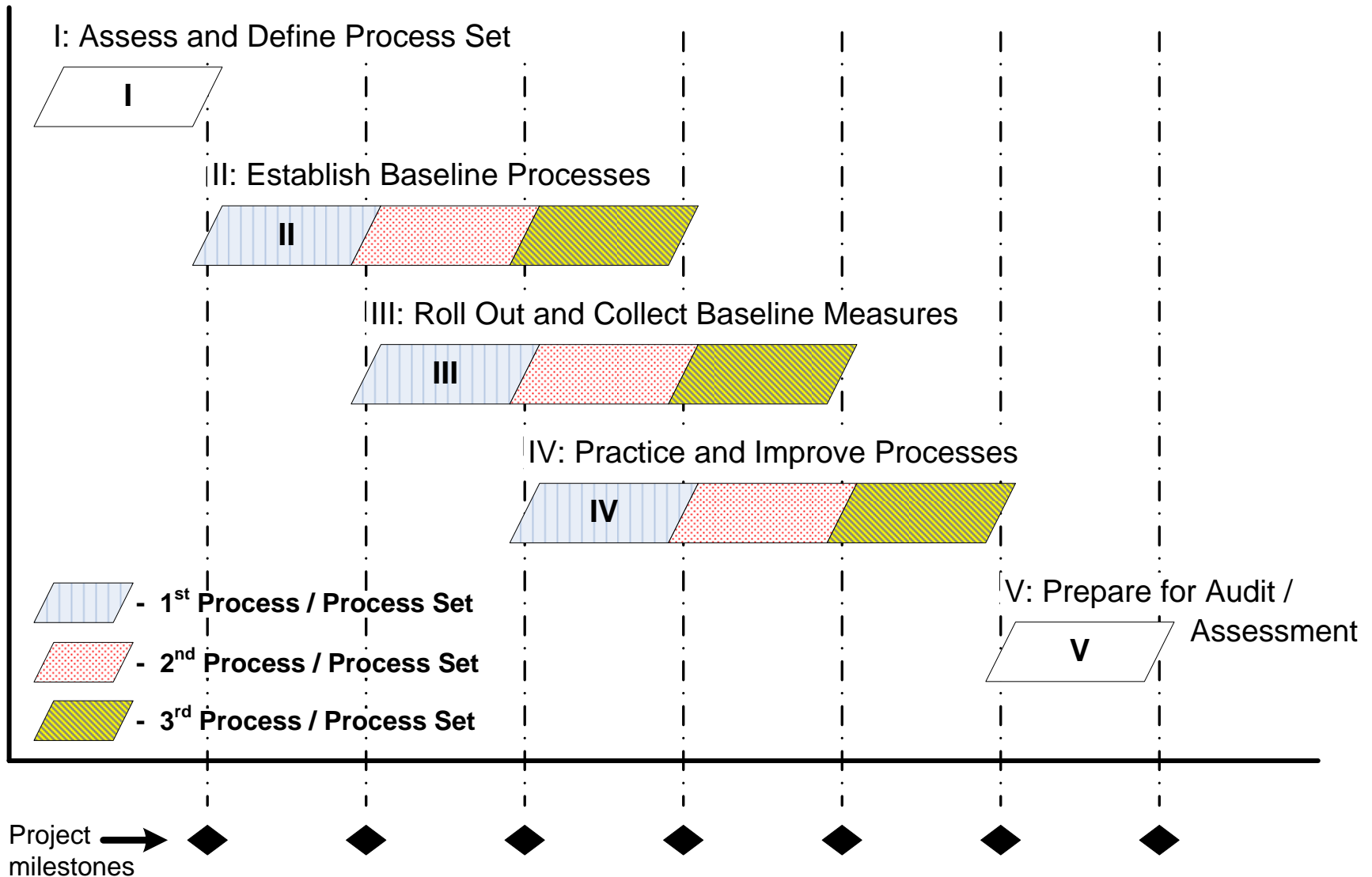
- Use a phased approach to defining and rolling out processes (Phase III):

1st process or process set: Need the most work, need execution time to produce evidence, or require that new tools be implemented

2nd process or process set: Partially in place already (status quo) or could be implemented quickly to show progress and maintain momentum of effort

3rd process or process set: Already robust (need better documentation, perhaps), remaining “low hanging fruit”

Phased Implementation



Getting the most out of consultants

- Find the right “fit” – and check references!
- Do your own legwork before asking
- Establish a consultant relationship with the auditor/assessor who will be officially rating the organization, if possible
- Use the consultant’s feedback, then follow up with them on the appropriateness of what you’ve done based on their feedback
- Use project milestones to check in



Conclusion and References

- A Process Improvement career can be richly rewarding:
 - Limitless opportunities across many industries
 - Opportunity to have visible impact on your organization's bottom line
 - Segue into other careers, due to in-depth process knowledge and project management abilities

Conclusion and References, cont.

■ For more information:

- Capability Maturity Model Integrated (CMMI):
<http://www.sei.cmu.edu/cmmi>
- International Organization for Standardization (ISO):
<http://www.iso.org/iso/en/aboutiso/introduction/index.html>
- 6 sigma: http://www.isixsigma.com/me/six_sigma/
- IEEE: <http://www.ieee.org/portal/site>
- ITIL: <http://www.itil.co.uk/>
- Project Management Institute (PMI): <http://www.pmi.org>
[Project Management Professional (PMP),
Certified Associate in Project Management (CAPM)]

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