

# Consultant Guidance Notes – Project - developing a Core Activity Map

## Pre-workshop

- Print of the relevant number of copies of “Developing systems that increase sales and bolster margins”, one for each participant
- Read the quote for the project and the PN Notes found in the relevant contract file as this will have very useful background information, possibly including early ideas around the Core Activity Map
- Consider reviewing Core Activity Maps of other similar companies (ask if in doubt)

## Recording actions and decisions

In the root of all project files is the “log actions and process notes file” open this and use it to record:

- Actions – assign responsibility date etc
- Decisions
- Information made available that will be useful in later meetings; potentially notes or comments around the detail of some of the processes

## The improvement plan

A key part of the management system implementation process is to identify things (processes, procedures, practices) that could be made better for the company. That by introducing new processes, forms, databases, systems ideas etc the company will in some way shape or form improve.

Some of these ideas may be so big they will need to be added to the business plan; the remainder should be logged so as they can be entered on the improvement plan.

## On site workshop – summary

- The core reference is “Developing systems that increase sales and bolster margins”
- Create core activity map (CAM)
  - Use our “normal” contractor approach as a base line and
  - Ask them what they call the different part of the process and what they call them
  - Tease out KPI's for the CAM
- Create overall systems diagram
- If you have time, tease out what works well and what needs to work better (see back-up plan below)
  - Attempt to establish frequency of problem and time / cost spent to resolve
- Ask them how they measure success for each process what are the KPI's

## Scene setting – positioning

The following are things that it would be useful to say to set the scene:

- As part of the process you (they) need to be thinking about your processes and particularly those things you want to improve
- The Core Activity Map are the activities that you deliver to your customers, the things they pay you for, the things that deliver value
- The Core Activity Map and the overall systems diagram needs to look like the way you think about how your work works
- The Core Activity Map and the overall systems diagram needs to use your language and terminology
- The level of detail can be as complex or as simple as you want to make it

- Some parts we can template and provide you with part-built examples; typically, the study and act rows...these we will blend with any existing processes or practices
- If you think we are tying you in administrative knots you need to shout!

## Creating the core activity map

Having read the contract and the PN notes prior to the meeting, start with the Core Activity Map...this needs to be in their terms and terminology and reflect how they think about the business...but might typically include the following:

Use the model on page 19 of the “Developing systems that increase sales and bolster margins” booklet

### Hints

- There are typically (although not exclusively) 5-8 core processes
- Each is typically (although not exclusively) usually made up of two words
  - A doing word (verb); process, acquire, manage, protect etc
  - A subject word; customers, enquiries, orders, operations etc
    - One word exceptions are things like; production, manufacturing
    - Three word exceptions are things like; acquiring customer feedback

### DOING THE WORK

- Acquiring customers - marketing
  - How do you view marketing? As a strategic process, an operational process or even a support process? No right and wrong answer
  - What marketing do you do?
  - Who are you marketing to? (domestic, commercial, public sector)
  - Is the marketing different for different product lines / services?
  - Is / should marketing be separate to sales or should they be combined?
  - What are the different marketing channels?
- Securing customers - sales
  - Who does the sales?
  - Does one person / team focus on all sales for all product and services or are there different sales teams for different product?
- Managing the operations - product and service delivery
  - What are the (top level) core components of the activities undertaken
  - Get job, do job, get money
- Managing transport and logistics
  - Is this a core operational process or an organizational non-event?
- Acquiring and learning from customer feedback
  - How is customer feedback obtained?
  - Are customer surveys done or are relationships with customers so good they don't need to be

With the core activity map complete work around the remainder of the systems diagram

## The systems diagram

Use the model on page 14 of the “Developing systems that increase sales and bolster margins” booklet.

### PLANNING

- Managing governance
  - Only usually applies to public sector or membership / trade organisations
- Managing compliance
  - Only usually applies if companies are doing 14 & 45001, but worth asking the question as some companies like to include it for a variety of company specific reasons
- Developing the strategy, plans, objectives and targets
  - Is there a (written) business plan?
  - How are objectives and targets set? What are they?
  - How is this information shared with staff?
- Managing business risk

- Is there a risk register?
- Should risk management be a separate process to the strategy process?
- Policies
  - What is there in place? (Q, SH, E)
  - Others? (sustainability, drug and alcohol, modern slavery, diversity etc)
- Planning for emergencies
  - Only usually applies if companies are doing 14 & 45001
  - Is there a disaster recovery / business continuity / crisis plan?
  - What sort of emergencies could there conceivably be other than the “normal”; bomb, fire, flood, IT/telecoms outage, electrical outage etc?
- Defining roles and responsibilities
  - Have you got an organisational chart?
  - Have you got up to date job descriptions?

#### DO- SUPPORT

- Developing new products (NPD)
  - Is this a core operational process or an organizational non-event?
  - Is NPD viewed as a strategic process, an operational process or even a support process? No right and wrong answer
- Managing, billing, finance and accounts
  - How does invoicing work? Is it different for different products / services? E.g. project works may be upfront payment followed by key milestones followed by end of job where as service might be annual, quarterly, monthly or in advance
- Managing purchasing, suppliers and sub-contractors
  - Are /should suppliers and sub-contractors be treated separately to suppliers
  - How are supplier managed differently to subbies (with subbies you are more likely to need to keep tax (UTR), certification, insurance and calibration records)
  - Is there a formal supplier approval process?
- Managing buildings and facilities
  - Who owns the building?
  - Who is responsible for what? (company / landlord) (fire / life systems, A/C, electrical, asbestos, security etc)
- Managing plant and equipment
  - Does managing plant and equipment need to be a separate process or should it be blended with something else like buildings and facilities or stock and stores?
  - What equipment do you use? (lifting equipment, plant, calibrated equipment, vehicles, anything else?)
- Managing stock and stores
  - Do the stock and stores activities need to be a separate process or should it be blended with something else like buildings and facilities or stock and stores?
  - What is kept in the way of stock and stores?
- Managing people #1
  - How do the following processes work; recruitment, induction, training / development, training records, engagement, annual reviews and exit?
  - Are they or should they be separate processes or can they be viewed together?
- Managing health and safety
  - More specific to 45001 projects
  - What do you have in the way of policies, procedures, support documentation?
  - What do you have in the way of risk assessment and method statements? (RAMS)
  - Is there / should you have a H&S legal register?
- Managing the environment
  - More specific to 14001 projects
  - What do you have in the way of policies, procedures, support documentation?
  - What do you have in the way of aspects and impacts?
  - Is there / should you have a H&S legal register?

- Managing Life cycle analysis
  - Only applicable for 1401 projects
  - What happens at the end of life for your products?
- Managing IT services
  - Should this be merged with protecting and managing the systems? Where does it best “fit” for your organization?
  - Is IT managed in house or with external support?
  - What are the key IT infrastructure items (hardware and software)?

STUDY (Check) (for the following parts of the system we have a series of templates from which we can build)

- Monitoring performance
  - What KPI's are in place
  - How are they measured, by whom and at what frequency?
- Managing performance improvement
  - Is there any kind of improvement process in place?
  - If so how does it work?
- Managing process development - auditing
  - Do you do any kind on auditing internally e.g. on site audits of field staff?
  - Do other customer / trade association organisations audit you? If so how frequently and what have the results been?

ACT

- Managing meetings and communications
  - What meetings do you have regularly? (financial, directors, operational, staff etc)
  - How frequently are they? Who attends?
  - Are there formal agenda and minutes?
- Protecting and managing the systems
  - Should this be blended with Managing IT services? Where does it best “fit” for your organization?
  - How is back up managed?

### Back up plan

- It is always difficult to gauge how long a session is going to take so always have a back up plan. Some people are more talkative, in others the systems diagram gets complex, the discussions boil out into key operational issues that need airing ...
- Review the core activities and tease out
  - What works well?
  - What needs to work better?
- Develop the KPI's against each of the core activities
  - What is currently in place?
  - What really needs to be in place?
- Go deeper into the business plan
  - Is there one?
  - Is there a budget? How is it managed?
  - What is happening in the market?
  - Who are the key competitors?
  - What are the key things that the company want's / needs to do over the next few years?
    - Move?
    - Get new / more people?
    - Get new plant?
    - Open / close another office?