

Achieving Strategic Goals Differently

A CASE STUDY

1. Business Context

The GROUP CHIEF EXECUTIVE OFFICER'S REVIEW in the South African Post Office Group Strategic Document, 2008 / 09 to 2010 / 11 states:

"In 2008 we reach a crossroads in the story of the South African Post Office. Over the last few years we have successfully navigated the turbulent waters of loss-making and arrived at profitability. We have patiently and systematically restructured our governance and operational systems, and have achieved stability.

We find ourselves in the position where we can leverage a healthy balance sheet to pursue bold growth in both our infrastructure and in our products and services. At this juncture we can start thinking as a competitive business, and not as a monopoly, and it is in this spirit that we present our new three-year strategy to take us into the future."

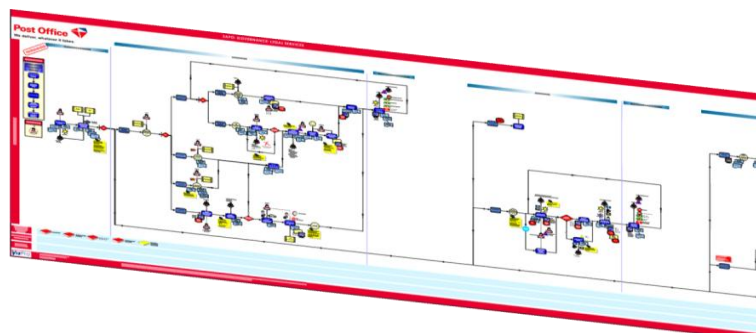
One of the building blocks to pursue the growth mentioned above, was the design of a new business model for SAPO. This took place over a period of 3 months from June 2007 to August 2007. Next, an effective organisation to deliver the new business model was required. In other words, the right organogram needed to be put in place to deliver SAPO's business goals within the new business model.

SAPO contracted the services of Microsoft Business Partner, Pétanque Business Specialists, to assist in this task. Using the out of the box approach of first defining WHAT needs to be done to achieve business goals within the new framework and then WHO should be doing the work, the Project Team set out to define at Executive Level the key processes.

2. Point of Differentiation

"We all loved the experience. Everybody was involved and everybody was excited. It was the best buy-in I've ever seen. It took hard work, but we didn't mind – we enjoyed it. People would say, 'Wow, why didn't we do this sooner?' It was so much fun." (Carien Venter, Chief Management Analyst: Strategy at SAPO)

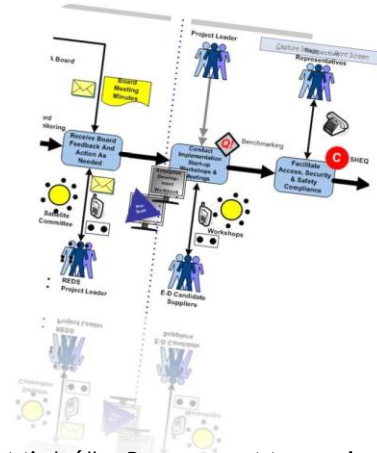
"Process mapping drove strategy and improved performance. These colourful, easy-to-use process storyboards transformed our proposed business model into a well-thought-out, high-level plan to implement the new model." (Marietjie Lancaster, Executive, Group Strategy at SAPO)



Pétanque applies ProcessStep, an in-house developed methodology to define who needs to do what when in order to achieve outcomes. ProcessStep delivers results through interactive workshops where role players define, debate and agree on each step in a process. Once the steps have been defined, the roles are assigned in a collaborative fashion. Organisation therefore follows process, or in other words, the process dictates what should be done and then roles are linked to activities.

The key elements of ProcessStep are:

- Participation, resulting in Buy-in
- Real time data capture: images and icons are used to build the process on screen, during discussion. Participants partake in the step by step build of the process, and at the end of the work session, leave with the logic, reasons and arguments for and against the process firmly embedded in personal knowledge banks. At the end of each session, the process map is visible evidence of the work that was done.
- Using easy to follow, colorful images.



“Microsoft® Visio® is our software of choice for ProcessStep” says Michéle Booyen, Managing Director of Pétanque. “It is easy to use, it allows our Process Architects to be creative as we capture data, participants understand what is happening at all times during the work session and the end result, as displayed in the process maps, is visually attractive and fun to work with. The real impact though is that Visio® has given us the means with which to unpack difficult, complex concepts, processes and business requirements in easy to understand, follow and come-back-to format.”

“Visio® is a wonderful tool and Pétanque knows exactly what they're doing.” (Carien Venter, Chief Management Analyst: Strategy at SAPO)

3. Measures of Success

“I am so happy we are doing this, now the process is clear - the grey areas have been defined”
Ray Mkize, GE, Marketing & Communications

“We need to do this for all the key processes throughout the business unit – it clarifies the roles”
Janras Kotsi, Group Executive Mail Business

“The value of this is having a third party taking you out of the box, presenting the view from the outside. This assisted us in re-looking our rationale for what we do, refining and improving. It also delivers the end to end process, enhancing an understanding for interdependencies and logic. It forces a refocus of what happens in the processes that drive what we do in our business” Pieter Swart, General Manager Mail Business

“This makes it easy to identify gaps in the process and close them” Vis Pieters, Mail Business

“Using their methodology and expertise, Pétanque identified structural misalignments,” says Marietjie Lancaster, Executive, Group Strategy “During the first level of process mapping, they eliminated duplication, clarified roles and responsibilities, identified risks, defined controls, and determined what changes were needed and where and how to measure performance.”



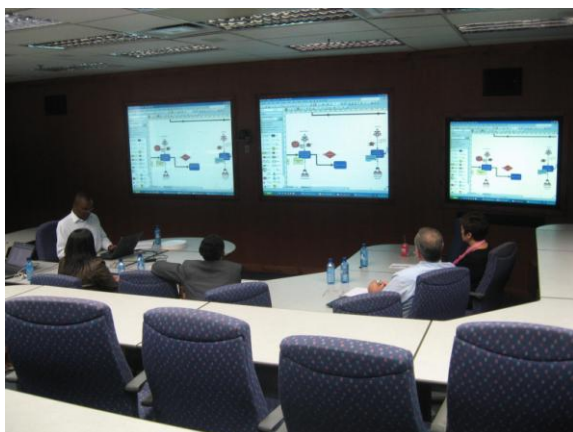
Everything went according to plan.

Pétanque were clear and specific. Their ProcessStep methodology proved a good fit with SAPO’s requirements. The company structure they proposed was based on process requirements, which became clear from the process mapping that was conducted over the project period. Their approach was different to that of other suppliers who assumed that SAPO’s processes were both known and documented. Pétanque’s ProcessStep clearly defined what needed to be done by whom at organisational level and Microsoft Visio® was used to document the processes, giving SAPO what they wanted – and more.

Pétanque sees business processes as the basis for organisational growth and development. Before you decide on organisational structure, you first need to decide on what must be done – this is their philosophy.

“We turned the discipline of organisational development on its head,” says Michelle Booysen, Managing Director and Specialist Process Architect at Pétanque. “We put the ‘what’ first – before the ‘whom’. Equally important is buy-in from all role players. Clear communication is a critical element of buy-in. We use Visio® as our preferred ProcessStep tool to do just that: through the intelligent use of icons and Visio® functionality, we create process maps and storyboards that leave little room for non-transparency and unclear communication.”

Despite the size and complexity of SAPO, it took only seven weeks of focused ProcessStep sessions with the executives to define each executive level process, which was then designed for best practice. Roles were assigned to each process, laying the foundation for a new organogram and securing buy-in.



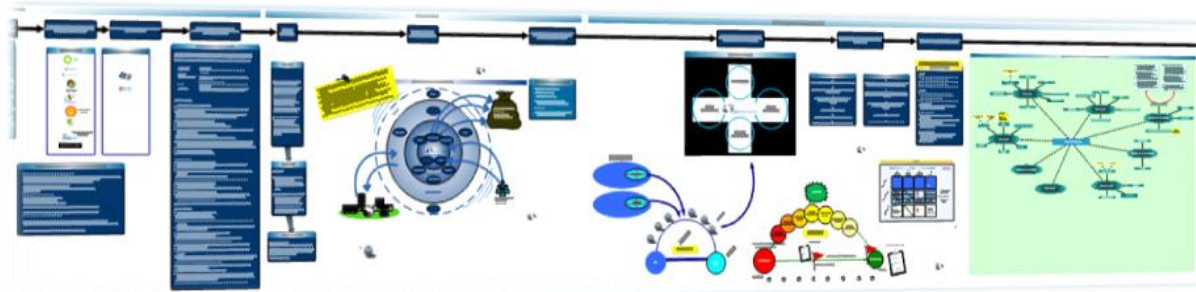
“The Visio® solution made it easy for everyone in the organisation,” says Marietjie Lancaster, Executive, Group Strategy at SAPO. “In the workshops, the Pétanque process architect would capture all data in real time on screen, based on verbal input from the participants. Icons were used to build process flows, facilitating discussion and debate, challenge and learning. Visio® simplifies complex processes by means of a simple, step-by-step layout and attractive, colour-rich graphics. Within 10 minutes everyone was on the same page. It is a cost-effective solution that was delivered in the committed time period.”

Pétanque translated the information they had gathered into a company-wide organogram – the new organisational structure – that was presented to the SAPO board in November 2007. It was approved later with minor changes.

Implementation and the change management associated with restructuring, from organisational to process improvement started on 1 March 2008. From mid March SAPO has rolled out the exercise to second level: in answer to an overwhelming number of requests from business unit heads, lower-level processes are being mapped, using the ProcessStep methodology along with the Visio® 2007 software. This supports the overall SAPO strategy to improve productivity and customer service and to deliver on each of the strategic goals.

For the second level mapping, the same results are achieved at management level, says Michéle Booyen.

Summarises Venter: “Companies worldwide would benefit from ProcessStep as an easy-to-use tool that can be applied in all instances where pictures are of higher value than words alone. It's an excellent tool for companies who operate in more than one market segment, who've been around for many years like SAPO, and where a fresh approach to business management is needed.”



4. Key Learning Points

There is immeasurable value in the process: it delivers:

- Change management
- Knowledge management
- Documented processes
- Buy-in
- Skills transfer within and between units
- Understanding of interactions and dependencies between units
- Elimination of role duplication
- A non-threatening environment that facilitates innovative thinking and participation
- Added benefits, such as application and input in other projects e.g. IT architecture, it provides the detail required for ISO accreditation, it is applied to train new employees as the maps provide for the “big picture” and the detail needed for induction and quick understanding of roles
- Defined job profiles
- Facilitates collaboration and team work.

For SAPO, these multiple benefits impact on successfully repositioning itself as an employer, service provider and role player in the South African economy.

5. Technology used

- Microsoft® Visio®
- Pétanque ProcessStep

6. About the South African Post Office

SAPo wants to be recognised as one of the leading providers of postal services in the world. With 3 000 outlets country-wide, their mission is to enable all South Africans to connect with the world by leveraging their broad reach, by embracing change, technology and innovation, and by distributing information, goods as well as financial and government services.

7. About Pétanque Business Specialists

Microsoft® partner Pétanque works with clients to improve business performance and bring about change through best-practice processes, business analysis and project implementation, linking into business vision and strategy. They specialise in:

- Process development, improvement and documentation
- Business analysis
- Project management
- Strategy development and business planning
- Communication development and presentation
- Interactive, informative and fun training