Realizing Business Value through Collaborative Document Development
Process Improvement Solution Summaries

Abstract
The process of capturing and communicating information using business documents is fundamental to the operational efficiency of any organization. Decision makers throughout an organization use information contained in business documents for both strategic and tactical decision making. The efficacy of the document development and management process – how resources are spent to distill and communicate complex data from multiple sources – directly affects the quality of an organization’s decision making, and consequently, the performance of the organization.

Often, the processes that organizations use to collaborate and create business documents are unstructured and ad-hoc. Unstructured processes yield longer document development cycle times, increased cost to manage the document development process, and lower quality of finished documents.

A holistic Collaborative Document Development solution provides structure around the process steps to collaborate, create, review, revise, and publish documents. Such a solution reduces document development cycle time and cost while increasing the quality of finished documents.

This paper summarizes how stakeholders from a variety of industries and functional areas within organizations have added real business value to their organizations by improving collaborative document development processes. In each case, a Microsoft® Partner worked with the stakeholder to develop a solution using the organization’s existing software portfolio. The process problem, the collaborative document development solution, and the resulting business impacts of each case are captured in the solution summaries within this report.
Introduction

Collaborative Document Development is a business process that is common to organizations across all industries and all functional areas. In every business, information is communicated through reports and presentations – documents which are used in decision making at every level within an organization. Collaborative Document Development describes how process stakeholders collaborate, create content, review content, revise content, publish final drafts, and archive important business documents.

Document development requires input from multiple sources, review and revision of content by document stakeholders, and approval and consolidation of content into a finished, usable form by the document owner. Groups that create business documents usually have manually intensive, unstructured processes in place. These unstructured processes rely on email communication, manual tracking of document changes, management of multiple document versions, and informal review and approval procedures. Such processes are inherently inefficient and introduce the risk of errors into finished documents. Moreover, valuable resources are consumed in managing the document development workflow – resources that would be better spent improving the quality of content or presenting that content to customers, partners, or managers.

This paper describes how groups from a variety of industries and functional areas have added value to their organizations by improving Collaborative Document Development processes. The table below shows many of the industry-specific Collaborative Document Development scenarios. The boxed scenarios are discussed in this paper.

Table 1: Selected Scenarios in Collaborative Document Development by Industry and Functional Area

<table>
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<tr>
<th>Industry → Function</th>
<th>Cross Industry</th>
<th>Financial Services</th>
<th>Manufacturing</th>
<th>Retail</th>
<th>Healthcare</th>
<th>Professional Services</th>
<th>Public Sector</th>
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<tbody>
<tr>
<td>Sales</td>
<td>Sales Forecasts</td>
<td>Pitchbooks</td>
<td>Proposal Management</td>
<td>Sales Reports</td>
<td>Contract Creation</td>
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<td>Marketing</td>
<td>Marketing Plans</td>
<td>Mortgage Origination/Servicing</td>
<td>Product Sales Guides</td>
<td>Marketing Campaign Material</td>
<td>Slicksheet Creation</td>
<td>New Service Material</td>
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<tr>
<td>HR</td>
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<td>Finance</td>
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<td>Claims Processing</td>
<td>Purchasing Agreements</td>
<td>Medical Billing Forms</td>
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<tr>
<td>Operations</td>
<td>Project Status Reports</td>
<td><strong>Vendor Performance Reports</strong></td>
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<td>Demand Forecast Reports</td>
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<td><strong>Proposal Creation</strong></td>
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<td>Product Development</td>
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<td>IT</td>
<td>Change Request Forms</td>
<td>Customer Service Docs</td>
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<td>Cross Functional</td>
<td>Corporate Communication</td>
<td>Safety Communication</td>
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The Problem
Although the Collaborative Document Development process manifests itself in different ways depending on where it is applied, common themes exist across all industries and functional areas. Businesses seek comprehensive and extensible solutions to the problem of collaboration across business groups, departments, geographical areas, and even cultural and linguistic boundaries. Business decision makers are increasingly becoming aware of the pains resulting from traditional methods of collaboration, which include:

- Long cycle times to develop important documents
- Labor costs associated with review/revise cycles and manual document management tasks
- Reliance on email or outdated file shares to manage document content and versions
- Ineffective teaming for document creation tasks
- Lack of transparency in the document creation process – no management of workflow
- Process bottlenecks arising from lack of visibility into upstream and downstream steps
- Little or no reuse of existing content, leading to ‘reinvention of the wheel’

The net effect of these process pains are unnecessary costs associated with creating documents, inaccurate or missing information, and an overall reduction in the value derived from document development.

The Solution
Improving a Collaborative Document Development process begins with a thorough examination of the current process to ensure that any proposed solution will meet the business requirements of the process stakeholders. Information worker technologies like Microsoft Office SharePoint® Server (MOSS), Microsoft Excel® Services, and Microsoft InfoPath® provide an excellent foundation for a Collaborative Document Development solution. These technology tools contain a number of powerful out-of-the-box capabilities which are customizable to unique processes.

A Collaborative Document Development solution built with information worker technologies and tailored to a specific business process yields a number of benefits, including:

- Better quality documents - reduced risk of incomplete or inaccurate information
- Reduction in document development cycle time and labor costs
- Enhanced management visibility into document development workflow - quicker response to bottlenecks
- Automated version control – reduced risk of information loss
- Single repository for completed and published documents
- Easier search and reuse of old content
Continuous Process Improvement

Improving a single Collaborative Document Development process represents the first step along a path to continuous improvement within the organization. Further improvement is often possible both within the process being analyzed and in other business processes throughout the organization.

Scaling Solutions within a Single Process

Within a single process, greater process improvement effort yields greater business value, but at a greater cost. In each case summarized in this paper, the solutions were designed to be scalable. Rather than jumping to the ideal process state and spending resources to build out every conceivable solution feature, the process improvement teams carefully balanced the technology features they needed (and the expense to implement them) with the business value they expected to realize. Later on, the process owners may decide to further improve the process by enabling additional technological features.

Extending Improvement to Other Processes

During the process improvement workshops summarized in this report, teams from each organization identified additional process improvement opportunities. Often, the most difficult portion of a process improvement workshop is to identify which process to improve. Again, the balance is made between the anticipated business value derived from improving a given process and the costs associated with conducting the process improvement. The process with the greatest value-to-cost ratio is selected for improvement first.

Once this process is improved, however, it often makes business sense to improve other intersecting processes. This was the case at the Bank (see solution summary below), where a single process improvement project led to the identification of eight other intersecting process improvement opportunities.
**Solution Summary**

**Vendor Performance Presentation Development at the Bank**

The Vendor Management Group at a large national bank (the Bank) manages the complex strategic relationships with the Bank’s largest vendors – vendors who are often the Bank’s largest clients as well. The Vendor Management Group sought to improve its Vendor Business Review (VBR) preparation process. VBRs are quarterly reviews of the performance and strategic relationships between senior Bank executives and the Bank’s 40 largest vendors.

**Problem**

VBRs require that dedicated Vendor Relationship Managers (VRMs) coordinate the creation of large presentations. Contributors to these presentations include stakeholders from the vendor’s organization, stakeholders from the Bank’s five lines of business, executive sponsors from the Bank who worked directly with vendor account managers, and the vendor relationship managers themselves.

The current state process contained a number of pains, including:

- Lack of visibility into the development process, bottlenecks in content delivery
- Long process cycle times and missed deadlines
- Laborious and error prone manual merging of multiple document drafts
- Reliance on email communication inundating VRMs with multiple drafts
- Heightened risk of accidentally disseminating proprietary data via email

The manually intensive nature of the VBR development process left little time for the VRMs to actually analyze the data and provide meaningful commentary. More importantly, executive sponsors were losing confidence that VRMs were delivering the accurate information required to support important strategic decision making.

**Solution**

The future state process solution leveraged the Bank’s existing Microsoft Office SharePoint Server (MOSS) investment. Using MOSS capabilities, the team designed an automated workflow and a central collaboration portal to provide a single, secure environment for stakeholders to develop VBRs.

Features of the new process design include:

- Workflow reporting dashboard to give document owners visibility into progress and delays
- Codified review and approval workflow that reduces the likelihood of document errors
- Automated version control and archiving
- Protected collaboration portals for each supplier, insuring the security of proprietary data

**Benefits**

The future state VBR presentation development process benefits the Bank in a number of ways:

- 40% reduction in work time for VBR contributors
- 60% reduction in cycle time to prepare final VBR presentation drafts
- 60% reduction in Bank labor costs for VBR preparation – over $200,000 in labor savings annually
**Solution Summary**

**Employee Handbook Development at Software Development Company**

The Software Development Company (SDC) is a global company with 150 offices in more than 45 countries. SDC has a long tradition, a well established culture, and more than 14,000 employees who brought in over $3B in revenue in 2007.

SDC’s Human Resources department faced challenges in developing and updating Employee Handbooks, which were created for a global workforce operating under a growing list of government regulations.

**Problem**

SDC’s Employee Handbook Update process involved gathering feedback from content owners, updating the handbook, ensuring buy-in from the legal department and other stakeholders, and efficiently distributing the handbook to employees. The current state process was entirely manual and relied on the email exchange of documents and manual posting of completed handbooks to multiple locations on the corporate intranet.

SDC’s current state process contained a number of pains, including:

- Extremely time-consuming and labor intensive development process
- Manually managed workflow requiring frequent follow-ups with content creators and reviewers who missed deadlines
- Manual version control and merging of multiple versions into a final draft
- Time-consuming and error prone conversion of handbook draft to HTML for posting on corporate intranet
- Multiple versions posted to multiple locations, leading to difficulties manually updating each version

**Solution**

The future state process solution was to modify the Employee Handbook Update process to leverage the company’s existing Microsoft Office SharePoint Server (MOSS) deployment. The improvement team designed a MOSS collaboration portal with automated workflow using InfoPath forms.

Features of the new process design include:

- Automated workflow to notify content owners and the legal department when updates are required to a shared document in the repository
- Automated workflow to remind stakeholders when a deadline is missed
- MOSS portal to allow stakeholders to work with only a single shared document - multiple document versions are no longer exchanged over email or saved to different file share locations
- Automated workflow to notify the HR Department when revisions have been made and document is approved for publication
- Single MOSS portal accessible by every employee in the company where the employee handbook is published in multiple languages

**Benefits**

The future state Employee Handbook Update process will benefit SDC in a number of ways:

- 40% reduction in cycle time: reduced update cycle time from 38 to 22 days
- Labor time reduced by 10 hours per update
- Eliminated versioning issues
- Enhanced regulatory compliance: reduced risk of non-compliance fees
Realizing Business Value through Collaborative Document Development

Solution Summary

Resource Management at a Major City Fire Department

Major City (MC) is a large metropolitan municipality with over a million residents and approximately 3000 city employees. MC’s Fire & Rescue Department (MCFD) maintains a number of fire stations scattered across the city. MCFD faced challenges caused by an antiquated information system and numerous budget overruns, which reduced the service level that it provided to residents. The department was under pressure to increase efficiency while minimizing costs.

Problem

MCFD must maintain an optimal level of staffing at fire stations to ensure adequate service in case of emergencies while minimizing labor and overtime costs. Resource management tasks to optimize staffing levels across the city’s fire departments were performed several times a day – before each shift. If a firefighter cannot report to work, city law and union contracts mandate that his or her shift must be covered by another firefighter of equal rank.

Under the current state process, when a firefighter reported an absence, managers at the fire station updated a staffing spreadsheet and emailed the spreadsheet to their Fire Chiefs. The Fire Chief then issued instructions to station managers to move firefighters between stations in order to maintain optimal resource levels at each station. Communication was conducted through phone calls and email exchange of multiple spreadsheets which were manually merged before resource decisions were made.

MCFD’s current state process contained the following pains:

- Manual process causes delays in staffing fire stations with the correct numbers and qualifications of personnel
- Heightened risk of errors in communication between stakeholders
- Excessive work time to determine staffing levels and resolve shortages
- Reliance on multiple IT systems to determine staffing requirements

The result was misallocation of expensive resources. Firefighters had no visibility into where they were needed at the start of their shift and typically reported to their home station first, even if they were needed across town. Commuting between stations further reduced resource utilization. Most importantly, public safety was affected when fire stations were not adequately staffed.

Solution

The future state process solution was to automate the staffing level reporting process using the departments existing Microsoft Office SharePoint Server (MOSS) with Excel Services deployment. Under the proposed solution, a common resource table built in Excel automatically tracks staffing levels across the city’s fire stations. An automated workflow built into MOSS ensures that the data within the resource table is routinely updated from the station managers’ staffing spreadsheets.

Features of the new process design include:

- Online staffing plan visible to all station managers and firefighters
- Automated workflow to email plan changes to station managers who then follow-up with the affected firefighters by phone

Benefits

The future state fire resource staffing process benefits the MCFD in a number of ways:

- More efficient resource allocation leading to lower operating cost
- Staffing shortages are resolved much faster, enabling a higher level of service
- Reduction in management labor time
- Greater process visibility, leading to better forecasting and planning
- Improved firefighter job satisfaction
**Solution Summary**

**Proposal Development at a Telecom Company**

A major nationwide telecommunications service provider (CC) provides telecommunication services along with technical design and implementation consulting services. With over 50,000 employees generating more than $15B in revenue, CC is a long standing company with deep roots in the telecommunication industry. The Sales Group at CC is responsible for preparing consulting services proposals for the company’s clients.

**Problem**

The Sales group at CC experienced difficulties gathering accurate and timely consultant résumés from the Professional Services group for inclusion in sales proposals. The résumés needed to be up-to-date and relevant to the opportunity at hand, since deals were often won or lost on the basis of consultant skill sets. The current state process to find consultant résumés was informal, with sales staff relying on their internal relationships within the Professional Services group in order to locate qualified consultants.

The current state proposal development process pains were:

- Out-of-date résumés, as consultants rarely updated their résumés
- Résumés were not centrally stored, so multiple versions existed
- Résumés were not formatted consistently, making indexing and searching résumés difficult
- Lack of a codified process to request and search for résumés

Overall, the current state process led to a 2 week cycle time to obtain the proper résumés and complete a sales proposal. Sales staff often resorted to re-using old résumés simply because of customer time commitments – resulting in lower quality proposals, errors, and in some cases, lost sales.

**Solution**

The future state process solution to CC’s proposal development problem was to implement a Microsoft Office SharePoint (MOSS) proposal collaboration portal with automated workflow, and create standardized résumé templates within InfoPath.

Features of the new process design include:

- InfoPath form enabling sales staff to quickly generate a request for consultant résumés from the Professional Services group
- Automated workflow to route requests to the proper manager
- Searchable repository for consultant résumés
- Separate automated workflow to periodically remind consultants to update their résumés
- InfoPath form for updating résumés that ensures a standard format

**Benefits**

The improved proposal development process benefits CC in a number of ways, including:

- 50% reduction in cycle time to prepare proposals
- Better matching of consultants to projects
- More accurate proposals, leading to an increase in sales
How to Get Started

The above examples of Collaborative Document Development process improvement are but a few examples of Business Process Improvement (BPI) planning engagements. BPI planning engagements are short, targeted, and inexpensive ways to analyze business processes, document problems, and design usable solutions to improve your business. A BPI engagement takes days or weeks, rather than months, and can deliver immediate and visible results because it is focused on improving a specific business process using software you already own.

Here are a few key questions and answers that can help get you started on your own BPI engagement:

- **Who should lead my BPI engagement?** BPI workshops can be executed using internal resources or with external help. Many consulting companies and technology vendors have business process analysis offerings that can easily fit into the BPI methodology. For example, if you are a Microsoft customer you might be eligible for a free consulting service called Business Value Planning Services (www.microsoftbvps.com) that focuses on BPI.

- **What business process should I target?** Although any business process could be analyzed through a BPI engagement, it is generally best to target smaller, departmental, discrete business processes. Great candidates are processes where you and your team are able to fully understand the problems and plan process improvements over the course of a few days, rather than larger processes that could take weeks or months to analyze.

- **Who from my organization should be involved?** BPI engagements are most successful when a team of 7-10 people can participate, preferably from a variety of groups impacted by the process at hand. For instance, if you were analyzing an employee handbook development process, you would want representation from HR, the business departments, Legal and IT.

- **How can I gauge success?** Take a baseline of your current process performance, both quantitative and qualitative. How long does it take? How many people are involved? What’s the error rate? How much does it cost? How much of a “headache” is the process? Then re-evaluate after the BPI engagement’s improvements are put into place.

In an increasingly challenging business climate, businesses cannot afford to let small process problems compound into large operating inefficiencies. Conduct your own BPI workshop today to identify and correct the sources of inefficiency.
For More Information
Examples included in this whitepaper are based on process improvement workshops conducted as part of Microsoft’s Business Value Planning Services (BVPS), a Software Assurance packaged service benefit. For more information about BVPS Workshops, visit https://iwsolve.partners.extranet.microsoft.com/BVPS/. 

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