

# Newsflash

FROM LINDA SWERLING

**September 12, 2002** - Fall is a time for renewed energy and focus. No matter your organization's size or age, it may be time to assess if you are getting the output you need - and whether or not you have your employees in the right positions. Read on for a case study that outlines how one company faced this challenge.

## REFIT THE WORKFLOW FOR BUSINESS TODAY

### PROBLEM:

A 10-year-old systems integration company was wrestling with several issues around functional areas and staffing.

These included how to:

- ◆ Reorganize the technical sales/sales engineering group and technical support group, which had numerous temporary staff about to leave
- ◆ Structure the technical support group to triage calls and emails
- ◆ Hire more programmers

Whether a business has gone through a growth spurt, is anticipating a reduction, or just isn't working right, one of the obvious things to look at is what is happening with the workflow. Workflow is a combination of various functions that the business needs to make it all happen, with specific activities for each of those functions. After the assessment, it was clear that the best approach was to refit the way the workflow was organized.

### SOLUTION:

Initially, the team listed on a flip chart all of the functional areas the business needed:

- ◆ G&A: Accounting, financial management, IT, legal, office management, facilities management, and HR
- ◆ Product/Service: Development, order fulfillment, and technical support
- ◆ Sales and marketing: account management, lead generation, trade shows, and public relations

Then the group recorded all the activities that had to happen under each functional area in the course of the business. In this

decided to erase the dividing lines and merge operations since the functions were the same.

The team then reviewed each function and activity and decided who could fulfill it. As they did, they created a Post-it(tm) note with the employee's name and placed it on flip chart next to the function or activity. Next they assessed how well suited or trained he or she was to do that job and added that rating to the note.

Once done, the company revised current job descriptions to reflect employees' new roles and responsibilities and hired staff to fill the missing slots.

As they moved through the process, the team realized that people were asked to do too many different things so none of it was getting done well. They needed more masters rather than jack-of-all-trades.

They also learned:

- ◆ How best to utilize the existing employee pool by matching employee skills/competencies with roles.
- ◆ How best to balance staffing needs across all the business functions
- ◆ What mix of senior to junior staff works best.

### RESULTS:

After the workflow analysis was completed and the current and newly hired staff became trained in their new functions, the organization:

- ◆ Gained a better balance between experienced and junior people;
- ◆ Has a senior management team with sufficient experience to set effective strategies for better profitability and future expansion;
- ◆ Receives a better value for their overhead because with the new workflow, job descriptions, and staffing, output is focused and productive.

If this sounds familiar to you, please feel free to contact us to see how we might be able to help.

**LEVEL II  
SOLUTIONS**

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