



Your Next Steps:

Business Process Improvement (BPI) Self-Assessment Questionnaire

Strategic:

- Does everyone know the vision, mission and strategy of the company and the impact of their duties and responsibilities as it relates to them?
- Has your business model gone from being successful to being unsuccessful?
- Do you need to bring your products/services to market in different ways?
 - Product/service bundling?
 - Match pricing to industry expectations and geography?
 - Provide different products?
 - Be more flexibility in warehousing and delivering products/services?

Business Processes/Cycles:

- Is the process consistently repeatable with excellent results, or is it a struggle to get results that are reliable?
- Is every business cycle conducted in ad hoc fashion?
- Has there been conscious alignment of all functions, departments and processes across the organization?
- Is there a lot of rework?
- Are there multiple revisions without a lot of value-add to the last few iterations?
- Do revisions cause a painful ripple effect across the entire organization?
- Are deadlines missed?

Sales:

- Do you know the revenue drivers?
- Does the sales team bundle additional products or services to “close the deal”?
- How clearly are sales orders communicated between:
 - the customer and the sales team?
 - the sales team and order administration, shipping and invoicing?
- Are there excessive customer complaints or dissatisfaction?

Cost Management:

- Do you know the drivers of costs?
- Have costs ballooned unexpectedly?
 - Have you determined why?
 - What metrics do you use as early warning signals?
- Is there transparency in your cost structure – direct and overhead?
- Who initiates costs?
 - Who pays for initial costs?
 - Who pays for ongoing maintenance and service costs?

Data Management:

- Do employees rely on the data in your systems or do they keep their own version?
- Does the data accurately reflect reality?
- Have your key databases been validated for accuracy during the last year? What percentage validity do key fields have?
- Do you have regular periodic inventory counting and reconciliation procedures performed for key assets and liabilities and their database records?
- Do regular operational procedures require and/or rely on updating or fixing data records using IT programming or “back door” accesses or update routines?

Analysis:

- Do the analytical people spend more time on data gathering/manipulation or on providing analysis and insight with adequate written explanation and presentation?
- Is it difficult to forecast cash flow and cash position?
- Do you know where your assets are? How much they cost? Who is using them?
- Do you know how much you make and how much you lose on each customer?

Resource Management:

- Do workgroups performing the same function:
 - operate in different ways?
 - use different systems and tools?
 - work from geographically dispersed locations?
 - report up different management chains?
- Is there confusion over roles and responsibilities?
- How do you know employees are performing their jobs reliably and consistently?
- Do employees have trouble being accountable for their duties (i.e., finger pointing)?
- If someone left their job, do you worry about who would take over key duties?
- Are job duties documented or are they only in someone’s head?