

# The Future of Workflow

## Collaborative Planning

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# Overview

- o What is a Plan?
- o How do Plans get created?
- o Benefits of Collaborative Planning.



# Workflow is A Journey

- o Workflow will have a profound effect on how we work.
- o Utopian: The push-button office?
- o Dystopian: A white collar sweat shop?
- o Consider the user's viewpoint to find what will win in the end.



# Two Classes of Work Process

## o Formal Application Process

- All users use dedicated application for this process
- Workflow is really just a way to help distribute the application among users
- About 12% of all office work can be formalized.

## o Situated Processes

- Users use standard productivity tools, WP, SS, DB, or applications specialized to the task and not the process.
- Other 88% of office activities lie in this domain.



# Situated Action

- o “[The term ‘Situated Action’] underscores the view that every course of action depends in essential ways upon its material and social circumstances.
- o Rather than attempting to abstract the action away from its circumstances and represent it as a rational plan, the approach is to study how people use their circumstances to achieve intelligent action.”

» Lucy Suchman, 1988



# No Fixed Plan

- o “To fill this gap between formal theory and wisdom, we need a framework that recognizes that the set of activities to be performed is not given in advance, except in a most general way - that one of the very important processes in organizations is the elaboration of this set of activities, and determination of which precise activities are to be performed at which precise times.”

» March & Simon, 1959, 1993



# Plans - Not Programs

- Plans are expressions, like documents, to explain the process to others.
- Plans can be created and modified by regular office workers.
- Plans change.
- Plans account for the specific situation.
- Plans describe a particular instance of a process.

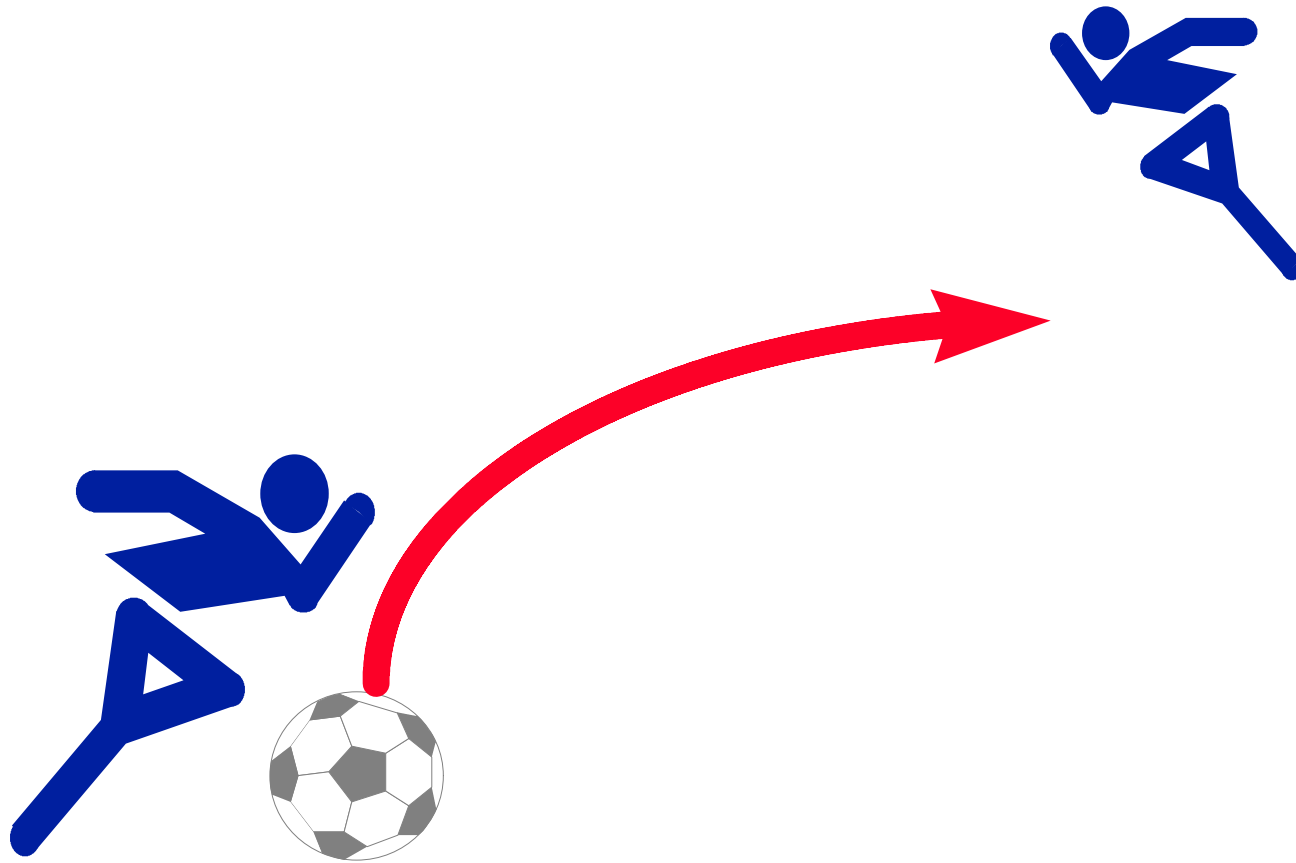


**How is the job  
discovered?**

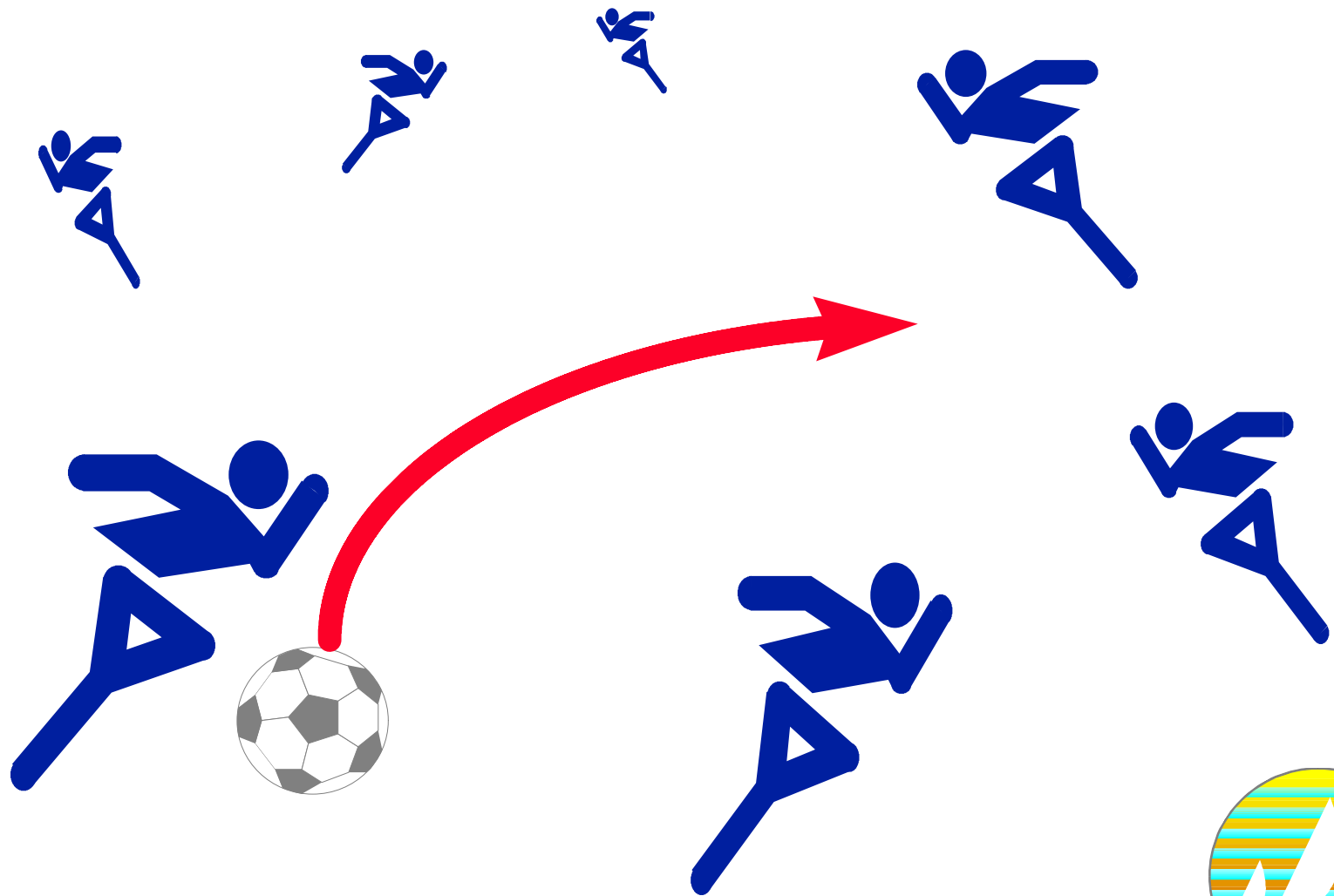
**How can plans  
be created?**



# World Cup Analogy



# World Cup Analogy



# Intangibles

- o Office work consists of tangibles and intangibles.
- o By focusing only on tangibles, one might miss important aspects of what is really happening.
- o Intangibles may not be readily apparent.



# Situated Tennis

- Doubles Tennis is **not** just tennis with two people on each side of the net.
- The number of players changes the game and strategy in fundamental ways.
- The exact strategy depends upon who the players are.
- Work must be planned “in the situation”.



# Who Knows the Job?

- Trainers can teach the basic skills, but not the specifics of a job.
- Coworkers can observe the job, but can not know the internal rationale behind decisions.
- Even the worker is not completely aware of all actions or why particular choices are made.
- The answer: No one!



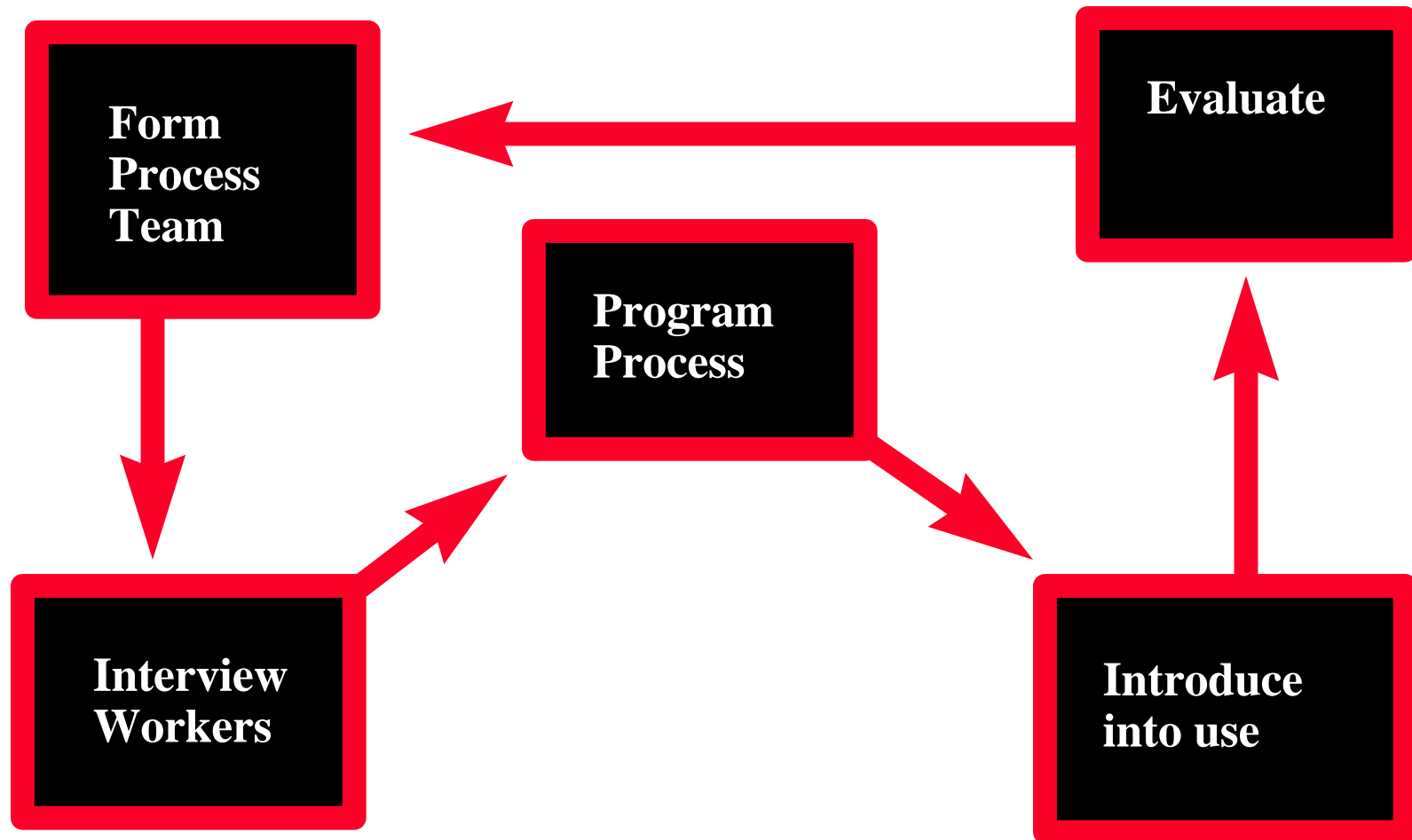
# The Job is Largely Unknown

- o “The skilled carpenter knows just how a given variety of wood must be handled, or what type of joint will best serve his purpose at a particular edge. To say that he ‘knows’ these things is not to say that he can put these ideas into words. That is never entirely possible. ... The practitioner’s knowledge of the medium is tacit.”

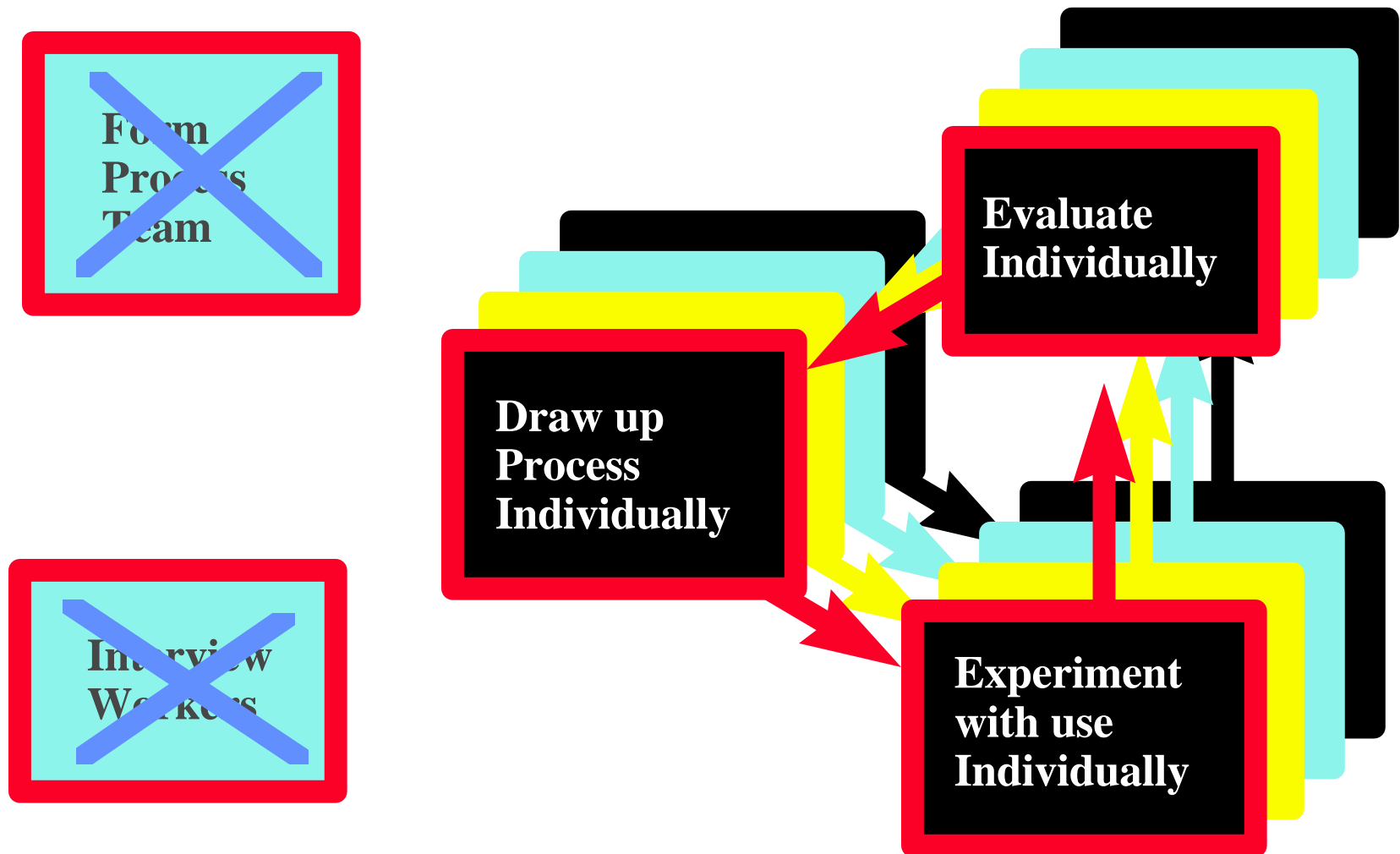
» Ulric Neisser, 1983



# Standard Meta-Process



# Collaborative Planning



# What is CP?

Collaborative Planning is concerned not with the process definitions, ---- but rather the process by which those definitions are created.



# Requirements

- o End user definitions: a programmer is not required.
- o Non-monolithic: Process is partitioned so that many people are involved.
- o Non-static: Changes can be made on-the-fly.
- o Ownership: Who can change a plan must be controlled by system.



# **Benefits of Collaborative Planning**



# Process Capture

- o Individuals (or small groups) try out processes.
- o They change only the part of the process they own.
- o No distinction between user mode and planning mode.
- o If the process is incomplete or wrong, changes can be made immediately - in effect learning.
- o The quality of the process increases until it is satisfactory.
- o No need to know how the process works from the beginning, like the way people learn their job.



# Politics of Workflow

- o Why is everyone talking about defining someone else's job?
- o Control of process definition means control of others.
- o Who will hold this power?

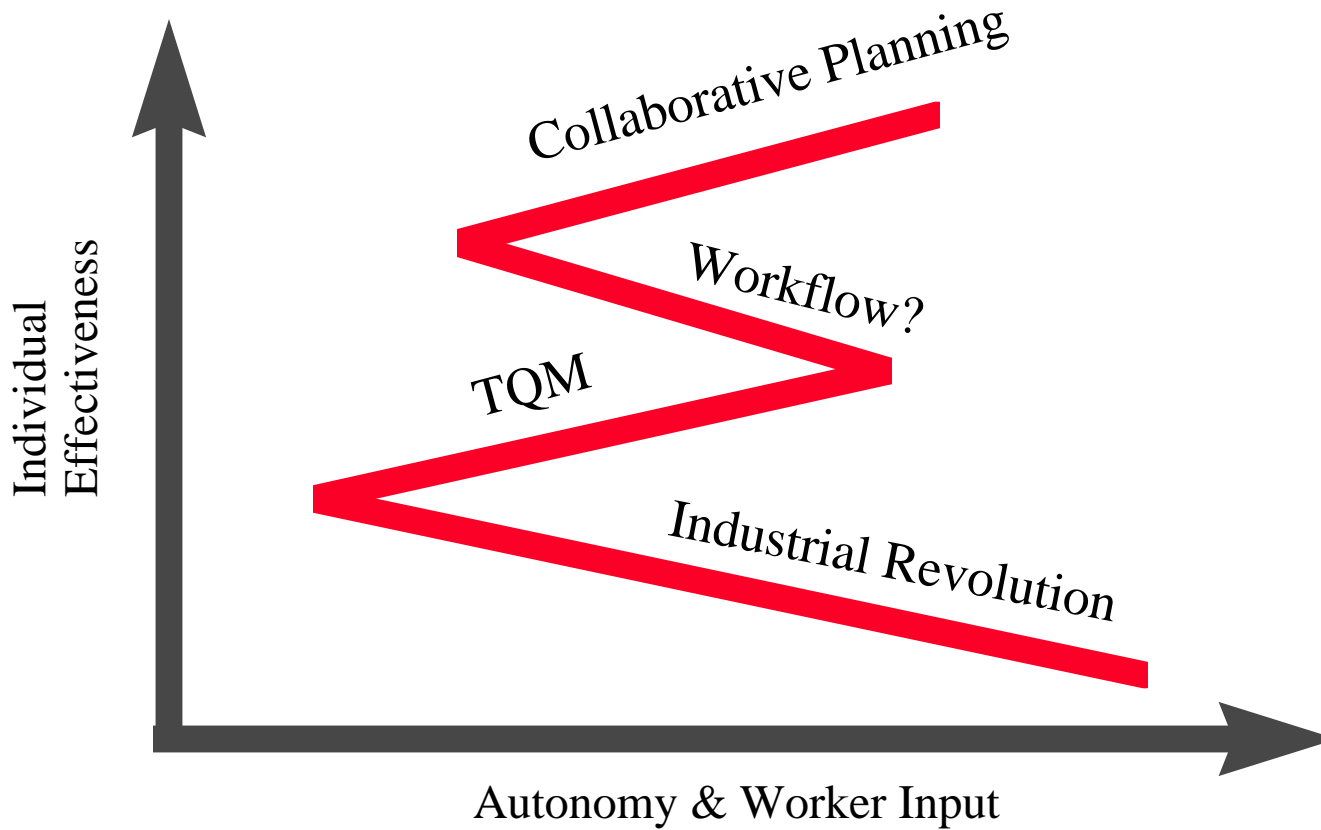


# CP Decentralizes

- Rather than centralized creation and control of process definitions, CP gives this capability out to smaller groups, even individuals.
- Users have control over their own processes.
- Improvements can be made on the spot, without having to get buy-in or sign-off from the entire organization.



# Management Swings



# Investment before Payback

- How many people and how long does it take to develop a workflow process?
- What if it is wrong? How quickly can it be changed?
- Will you be able to respond to external changes. Will a workflow system hold your company back?
- The biggest barriers to workflow use: Cost & Risk.



# CP Reduces Initial Investment

- o Complete process description not needed before starting.
- o Since the system is designed around exceptions and responding to them, there is no need to code all possible situations from the start.
- o Design for change makes a collaborative planning system more responsive.



# Summary



# Collaborative Planning

- o Many people can share in planning
- o Different parts owned by different people
- o Plan composed from reusable pieces
- o Loops, branches, decisions allowed
- o Changes allowed at any time
- o Plans are specific to the instance



# Benefits

- o Better Processes
- o Aids Process Capture
- o Smaller Initial Investment
- o More Responsive to Change



# Design For Change

- First Generation Workflow can be made to support a process.
- Second Generation Workflow recognizes that processes themselves change, and supports the activity of creating processes.
- Regatta Technology is unique in that it is designed for continual improvement of processes.



# Administriva

- Session Evaluation Forms
- Local SIGOIS meeting, see flyer
- Workflow Coalition Standards Talk  
2:00 pm Friday

