



SURVEYING AN ORGANIZATION'S BUSINESS PROCESSES

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Annotation

This article explores the concept of managing business processes, they first need to be described, since it is impossible to effectively manage something that is not detailed and understandable. The documents created reflect the existing situation in the organization with varying degrees of detail, depending on the goals of the survey being carried out. The obtained materials can be used to analyze and develop various solutions to optimize business processes.

Keywords

business process, organization, procedures, research and analysis, models and recommendations, results, implementation, list of reporting documents, identify the functions.

The descriptions created represent a documented body of knowledge about the activities of the organization, for example:

system of goals and objectives for the development of the organization;

organizational and HR structure of the company (taking into account the order and forms of interaction of the organization's structural divisions with each other and with the external environment):

regulations on departments and job descriptions of their employees;

high-level description of business processes (features and procedures for carrying out management activities);

detailed description of business processes (the list of processes depends on the objectives of the survey);

high-level description of used and implemented information systems;

other aspects of organizing the company's activities.

The examination process consists of the following procedures:

1) determination of the work plan and boundaries of the survey (subject area, list of functions,

processes, etc.);

- 2) collection and study of documentation (instructions, regulations, regulations, etc.);
- 3) survey (interviewing) of employees involved in these processes and their managers;
- 4) monitoring the implementation of this process (the actions of company employees).

These procedures can be performed in parallel or sequentially. For example, the study of documentation and the survey can take place simultaneously, since as a result of a conversation with employees, you can find out that, as part of performing a function, they use instructions that you were not previously aware of and you have not studied.

The collection of initial information is carried out by consultants or responsible persons with the involvement of organization employees who are responsible for the implementation of the processes being surveyed. As a rule, the persons responsible for organizing the survey on the part of the company (project supervisors) organize and collect from all surveyed units regulatory, methodological and reference documentation, which they use in the course of performing their official duties, and transfer it to analysts (consultants or another person directly performing the business process survey).

After an initial study of regulatory and reference materials, a list of persons who will participate in interviews and (or) questionnaires is determined. As a rule, this list is formed with the participation of interested parties and a curator from the organization under study.

Next, questionnaires and a list of basic interview questions are developed. Appropriate measures are being taken to examine the real state of affairs in the implementation of business processes. As a rule, studying the situation “as is” occurs in several iterations, conversations, consultations, and surveys, since during the initial analysis of the collected information there is always a need to clarify some aspects. If it is not possible to interview all participants in the process in person, various survey methods are used.

Interviews and questionnaires should be conducted with those who perform the described process since it is, who knows the basic information about how the operations of the process are implemented, and can also tell about the difficulties and problems that arise. Manager, as a rule, will describe the process as it should be performed and, at best, outline some problematic issues and wishes regarding the optimization and automation of certain actions.

However, the manager can indicate decision points on which the further execution of the process depends or the transfer of results to the input of another process. In addition, the implementation of alternative business process options may also depend on these decisions. For example, when we are talking about events, the occurrence of which triggers the execution of non-standard actions.

To obtain the most up-to-date information about the state of the organization's activities, data collection, questionnaires, and interviews are carried out at all levels of management and then compared during the analysis phase.

To improve the quality and efficiency of work to survey the company's activities, an organizational and administrative document (charter and (or) project regulations) is created, which indicates the project manager from each unit being surveyed and the work plan. The project curator organizes the interaction of employees of the surveyed departments with consultants and analysts who are engaged in surveying and analyzing business processes. The work plan must include deadlines for each stage.

For example, as part of a survey of the activities of a government agency to further optimize its administrative processes and develop proposals for their automation, the following stages of work can be performed (a detailed description of these stages is given in Table 1):

- examination of the functioning of the organization's structural divisions;
- high-level examination of the activities of each division;
- clarification of the information received on the functioning of departments;
- low-level study of each business process under study;
- clarification of the information received on the functioning of the departments;
- diagnostics of the automation system, formulation of problem areas, and functional requirements for automation of key processes.

Table 1 - Description of the stages of research into the activities of an organization (using the example of research to optimize business processes with their subsequent detailing)

Purpose of the stage	Contents of work	Result
Stage 1. Inspection of the functioning of the organization's structural divisions		
Determination of the structure of the organization, general patterns of activity of departments in connection with the objectives of the survey	Studying and systematizing information from documents regulating the activities of the organization as a whole, namely from documents defining the functioning of the organization and the directions of its activities; rules and principles of management, organization development strategy	The general principles of the functioning of the organization, the organizational structure, the main processes, and the rules of interaction with the environment on the subject under study have been determined.
Stage 2. High-level survey of the activities of each department, within the project boundaries		
Identifying the system of high-level processes of the organization, fixing the functions of departments	Obtaining information about the order of functioning of the organization's structural divisions to structure the main volume of information related to the general conditions of their functioning	A general list of high-level processes, and their diagrams have been compiled, and the activities of the departments have been described.
Stage 3. Clarification of the information received about the functioning of the departments		
Identification of the general structure of high-level processes, fixation of interrelated functions of departments	Determining possible inaccuracies in the understanding of the implementation of business processes, identifying the actual picture of the organization's work, possibly distorted in the understanding of its employees	Consistent description (model) of the main high-level activity processes
Stage 4. Low-level study of each business process under study		
Description using the selected methodology of the organization's business processes under study	Interviewing (questioning) employees of structural divisions of the organization about the procedure for implementing a specific business process	The boundaries and participants of the process, mechanisms, methods, tools used, resources, results, etc. are defined.
Stage 5. Clarification of the information received about the functioning of the departments		
Description using the selected model (notation)	Coordination with the organization's employees of the	Consistent business process models

of a business process	developed business process models and identification of possible inaccuracies in them	
Stage 6. Diagnostics of the automation system, formulation of problem areas, and functional requirements for automation of key processes		
Determination of compliance/non-compliance of the existing level of development of an information system in an organization with its goals and objectives, formulation of functional requirements for used and implemented information systems	Identification of the main problem areas in the field of IT support for the implementation of business processes; determination of requirements for automation of business processes of the surveyed divisions; formulation of the main directions for the development of the organization's IT infrastructure	Developed proposals and recommendations for automating the organization's business processes

Based on the results of the study, a reporting document (or a list of reporting documents) will be created. As an example, in Table 2 shown two structures of the content of reporting documents on the study of business processes of various companies.

Table 2 - Examples of the content of business process research reports

Title of the reporting document	Content
Development of models and recommendations for improving business processes	<p>Introduction</p> <ol style="list-style-type: none"> 1. List of documents based on which the development. 2. Development goals. 3. Composition and content of work. 4. Main results of the work. 5. List of developed models by areas of activity. 6. Text descriptions of models. 7. Recommendations for optimizing the organization's business processes. 8. List of abbreviations and symbols. Application. Organizational business process models
Research and analysis organizational processes	<p>Introduction</p> <ol style="list-style-type: none"> 1. Goals and objectives of the study. 2. Scope of the survey. <p>General characteristics of the organization's functioning:</p> <ul style="list-style-type: none"> • goals and objectives of the organization, criteria for assessing effectiveness. • organizational structure of the organization and its divisions. • the main functional areas of the organization's activities. • schemes and descriptions of the processes of the organization's main activities.
Title of the reporting document	Content
	Analysis of the compliance of the level of existing IT infrastructure with the tasks of supporting the organization's activities

	<ol style="list-style-type: none"> 1. Providing automated support for the organization's activities in ... functional area (1). 2. Providing automated support for the organization's activities in ... functional area (2). 3. ... <p>Main directions for improving business processes and IT infrastructure of the organization:</p> <ul style="list-style-type: none"> • Problems of implementing business processes and their automation. • Functional requirements for the IT infrastructure. • Approximate plan for the implementation of work to optimize the IT infrastructure. <p>conclusions Glossary Applications</p>
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During the study of business processes, risk situations may arise that do not allow studying the company's activities at the proper level and obtaining all the information necessary for further work on the real situation of the company's business processes. Such risks arise as a result of violation of the goals and scope of the study (for example, studying only the main processes - order processing, production of the ordered product, and shipment to the client, although it was necessary to study the activities related to the fulfillment of customer orders, which also includes the processes of managing mutual settlements with the client and the purchase of material for the production of an order), work plan (for example, failure to meet deadlines for the first stage of the study), methodological integrity of the study (for example, some of the processes were studied through interviews and described to the level of operations, and the other part of the work was studied based on documents and completed questionnaire forms).

Conclusion: A survey of an organization's business processes is carried out to form a holistic view of the management and execution of the company's business processes, and to determine the methods, tools, and resources used. In addition, the purpose of surveying business processes may be to determine the list of information systems used and the tasks that are solved with their help. An important result of the survey is also the identified requirements, wishes, and proposals coming from the direct executors of business processes regarding increasing the efficiency and quality of the implementation of processes and organizing information interaction between them. Thus, the results obtained allow us to analyze and develop recommendations for improving business processes, for example:

- clarify the goals of the organization and key performance indicators of its structural divisions;
- assess the volume and intensity of information flows;
- identify and describe problem areas in the organization and management of the company's activities, and determine their causes and factors;
- identify the functions of the organization's structural divisions, determine the directions of interaction between them, information flows within and between divisions, and external information interactions;
- develop recommendations for streamlining information flows, including document flow;
- develop new or improve existing business processes, including through the implementation of information systems.

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