



The Ultimate Guide to Living Processes

A handbook for Effective Process Collaboration

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Companies focus on process optimization

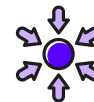
The greatest source of getting better lies in the streamlining and linking of process information.

The whole world runs on processes and standards.

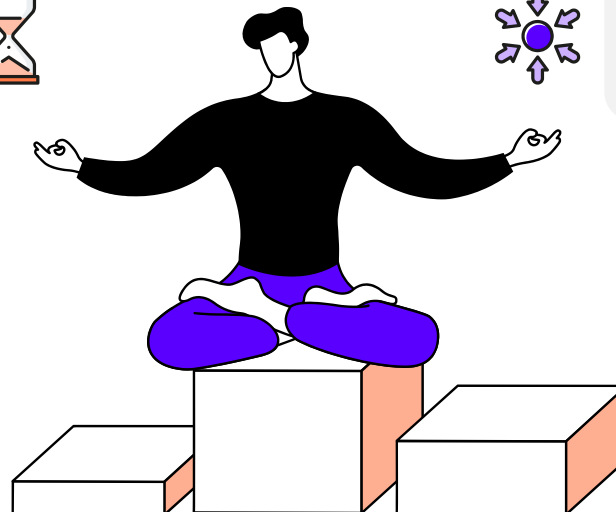


Every customer and stakeholder experience is the product of a flow of information in collaboration.

Process excellence as master driver for business impact and value.



Optimize and integrate every information element for self-organization, extraordinary experiences and world-class performance.



> But how?

This guide helps your organization continuously to improve by ...

Orchestration and standardization of actions operated across your value generation – from core processes to supporting, management and compliance processes.

Effective Process Collaboration is ...

1. A **simple methodology** to transform, execute, monitor and enhance your processes.
2. A **practical approach** to process execution built on the principles of management systems while advancing it by modern technology.
3. A **lean solution** to remove the support gaps which cause frictions, interruptions and risks.

Technology, analytics and management systems are all parts of the story. But eventually this book is not an academic discussion.



This guide is about ...

Actions and **living information** and the unlimited power that's possible when everyone contributes to sustainable organization excellence.

It is a **deep dive** into the **why, how and what** of Effective Process Collaboration – its roots, the steps and the results it delivers.

And it is a workbook with good practice examples and frameworks throughout the book. Use them to plan **your transformation**.

Effective Process Collaboration is about empowering your logics, innovations and standards.



Effective Process Collaboration delivers impact and value where people work together

From the established industrial company ready for transformation to the startup scaling up to new heights. Every outcome driven company gets better with Effective Process Collaboration.

This guide is particularly suited to people in small- to medium sized companies closely connected in areas like ...

- General Management
- Compliance Management
- Process Engineering / Digital Transformation
- Quality / Environmental / Security Management
- HR Qualification and Management
- Supplier Qualification and Management
- Operations and Work Planning

If you are a senior executive, a process manager, a process owner, a process expert or transformation engineer, this book is written for you.

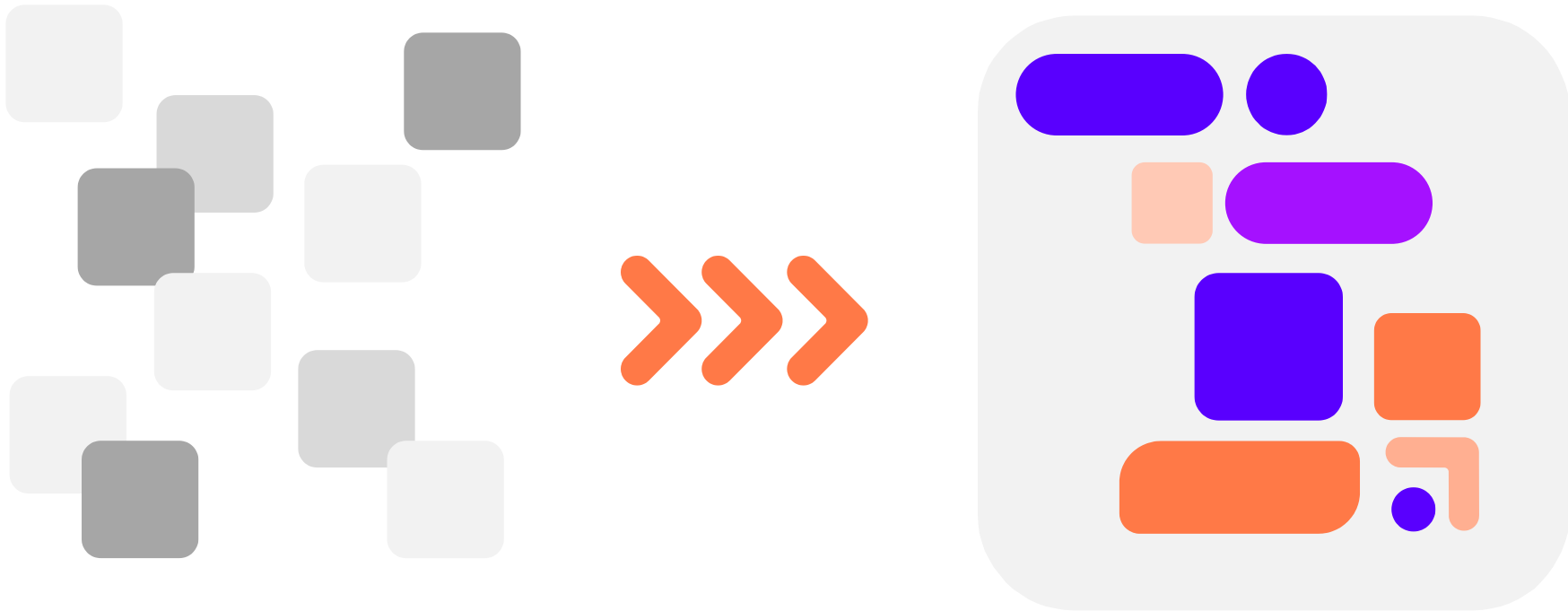
And if your field of interest is somewhere else – we invite you to stay with us and **enjoy the tour** anyway.

People use process collaboration for all kinds of things – from orchestrating family travels and family jobs to managing sport sessions and exercises.



Let us have a closer look.

Effective Process Collaboration gives system to your knowledge and actions for process excellence

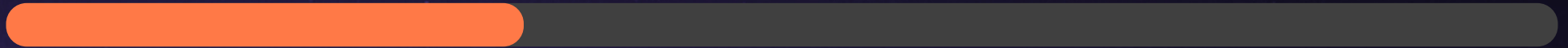


From user to enabler

1 Why Effective
Process Collaboration

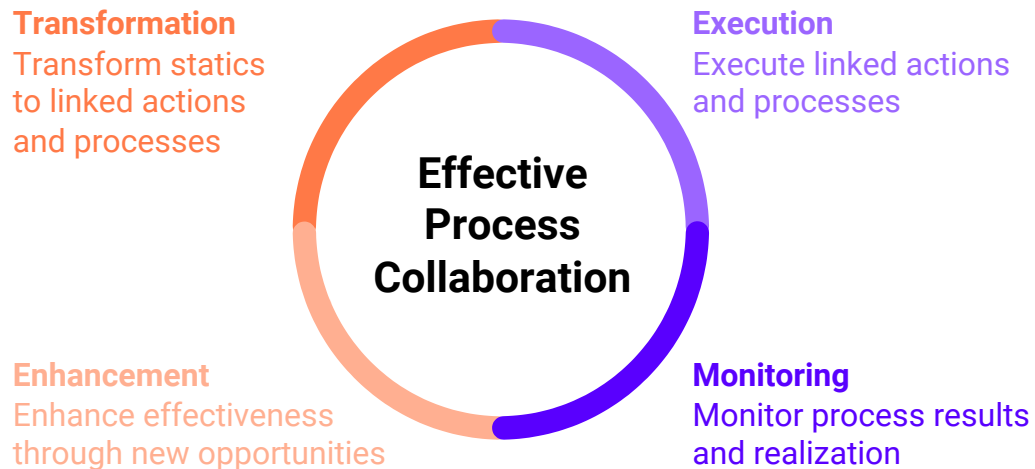
2 How does it work

3 What to do



Effective Process Collaboration is an advanced combination of proven practices and evolutions

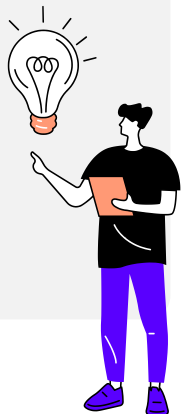
Based on the PDCA-Cycle Effective Process Collaboration happens in four recurring steps to improve process excellence



Do you know?

As early as the 1930s, the American physicist and statistician Andrew Shewhart developed the so-called Shewhart Cycle for continuous learning and improvement.

W. Edwards **Deming**, who is arguably considered the father of modern quality management, developed the Shewhart cycle further to the **PDCA-Cycle** as known today. The PDCA cycle describes the stages of the continuous process improvement through standardization: **Plan-Do-Check-Act**.



The story of Effective Process Collaboration

Effective Process Collaboration

Collaboration productivity and process adaptability become competitive advantage



Development of Collaboration Technology

Groupware E-Mail Intranet Modern Workspace

Development of Business Digitalization

Mainframe PC Office ERP BPM Cloud

Development of Process Standardization

Shewhart Cycle PDCA TQM QMS ISO IMS¹

¹ (Lean) Integrated Management System

Quality Management and its essential part in getting better

Adoption of the principles of quality management is an organization's strategic decision to improve its performance and stakeholder value.

Sustainable
Stakeholder Value



Innovation and Progress
(Future Value)



Principles of Quality Management

- Customer Focus
- Leadership
- Engagement of People
- Process Approach
- Improvement
- Evidence-Based Decision Making
- Stakeholder Relationship Management

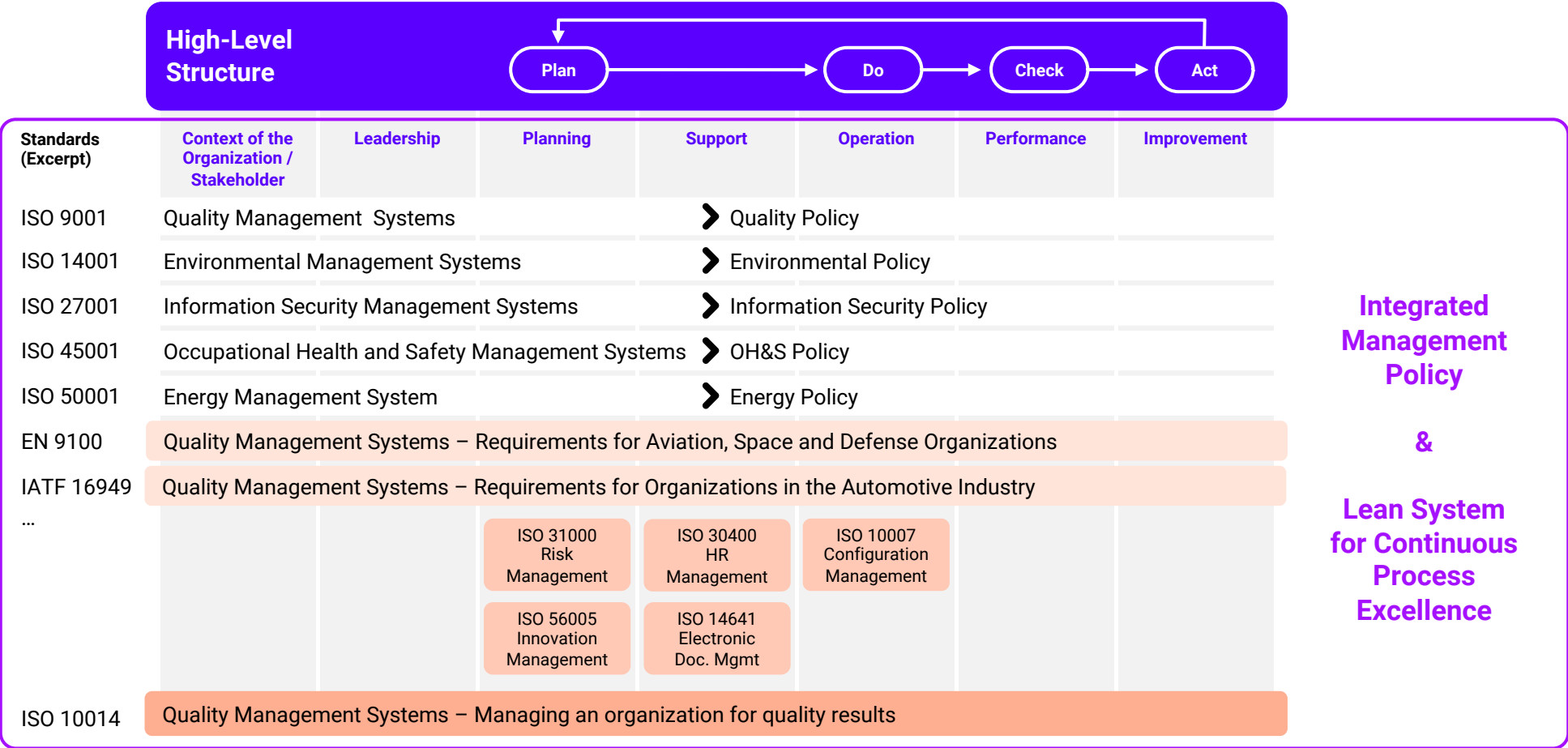
Do you know?

Successful companies understand quality management as an **internal consulting function** including core and supporting processes - not just for outward motives.



The High-Level Structure - the master framework for excellent and lean management

Through integration a lean management system is possible.



Effective Process Collaboration now!

Every business is an individual collection of processes and actions.
It is getting more and more complex to meet its compliance and to achieve its objectives.

Effective Process Collaboration needed today:



Increasing customer and stakeholder requirements demand **fast learning**.



Evolving procedures need **immediate adaptability** and combination by the process experts.



Working in distributed teams and networks requires structured, filtered and **real-time sharing of information**.

“
The only thing you can't recycle
is wasted time.”

Taiichi Ōno, Inventor

Every change in values, business transactions or management system impacts the process environment. Without dynamically linked processes and actions as well as traceability of process results and realization, it is impossible to continuously optimize and adapt processes. **Rigid or fragmented solutions are not up to that.**

Effective Process Collaboration is purpose-built to handle the inherent complexity and dynamism of modern management.

The value of Effective Process Collaboration is to standardize, digitalize and connect individual components to accelerate the organization's **structured collaboration engine**.

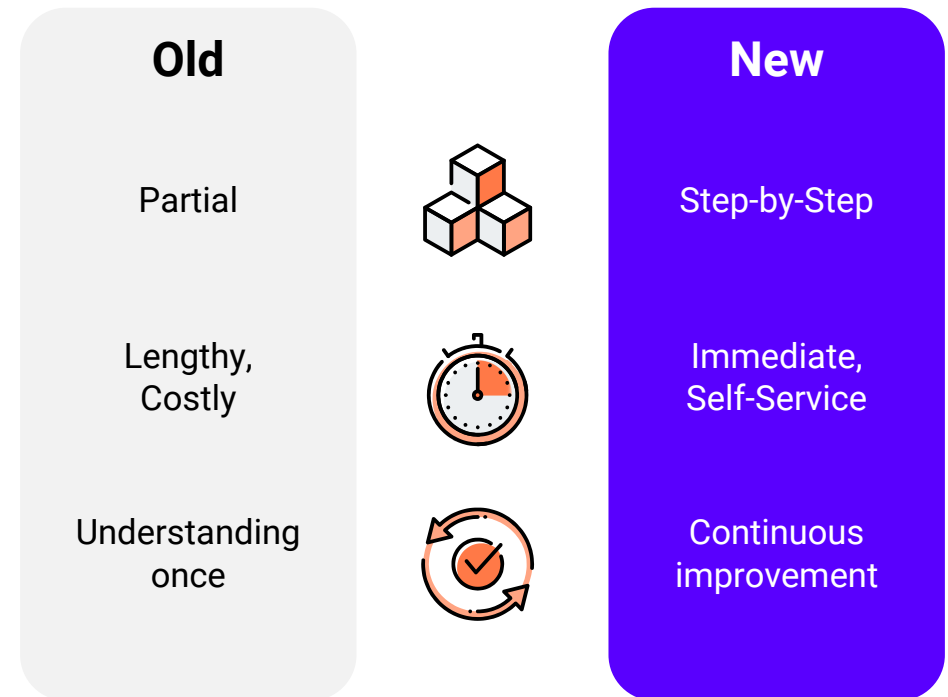
Why not just go on

PDCA and process improvement is not new. But the dynamic and complexity of the modern process environment has quickly accelerated beyond capabilities of (rigid) traditional tools.

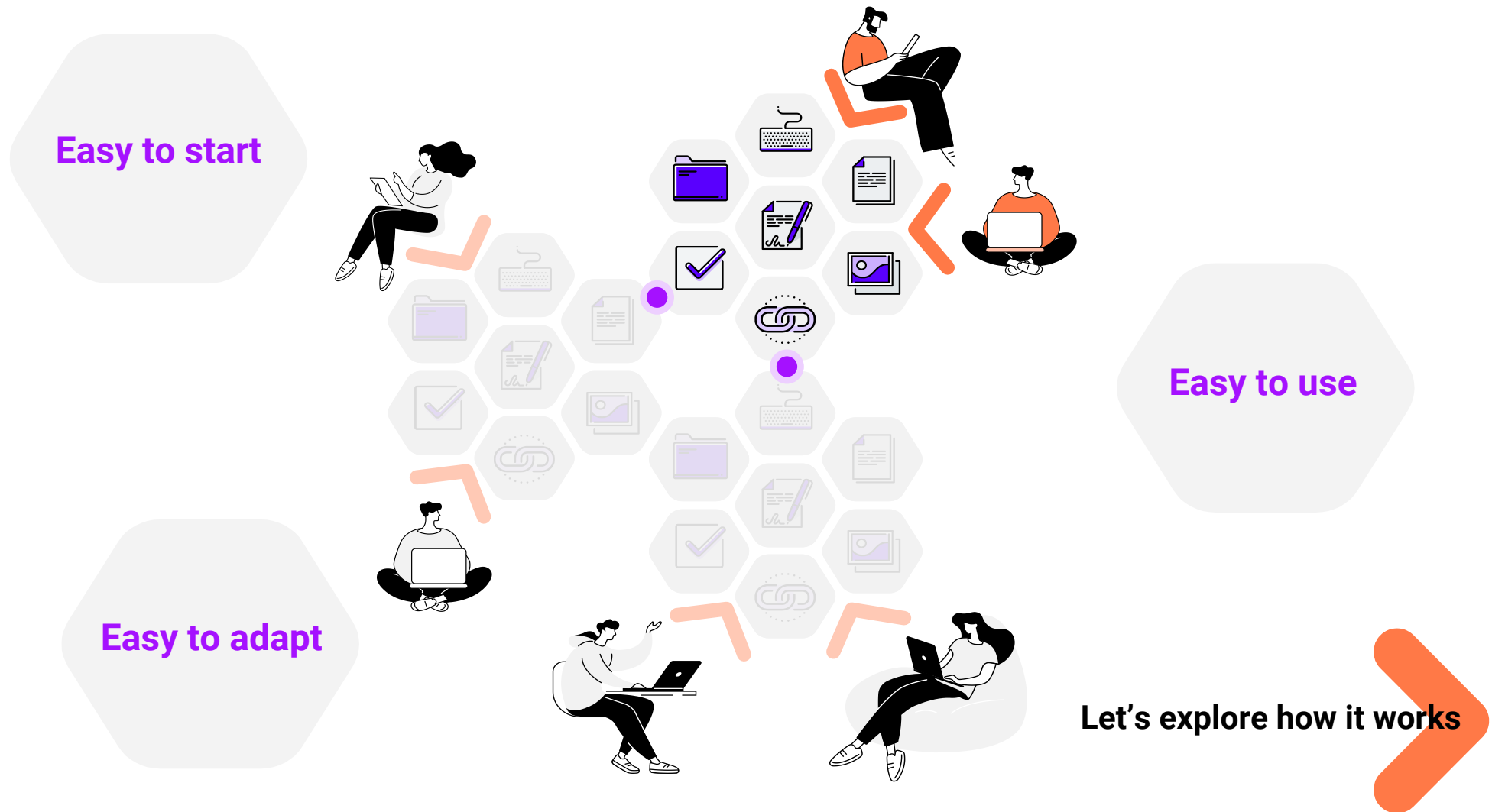
Resource or document management software – or worse, worksheets and notes – just can't deliver the real-time control, execution, insights and adaptability that continuous process excellence demands.

How complex is it to streamline a process step in your ERP or DMS?

Effective Process Collaboration combines **role-based** planning, execution and analyzing across process participants. From process owners, managers to team members, external partners and customers.



Effective Process Collaboration in one assisting system



From user to enabler

1 Why Effective
Process Collaboration

2 How does it work

3 What to do

The four recurring stages of Effective Process Collaboration

The trustkey process assistance delivers Effective Process Collaboration in four key stages

The Effective Process Collaboration Cycle

Transform Process Owner, Expert

- Design templates for processes and actions
- Assign default roles and automations
- Link templates together to processes and flows
- Visualize and communicate processes and relationships



Execute Process Operators, Team

- Use templates as action packs to enact processes
- Work together and complete action packs
- Capture digital data and best practices
- Give feedback and make suggestions

Enhance Executive, Manager, Process Owner, Expert

- Streamline and adapt templates
- Reduce process time, costs and risks
- Unlock teams to focus on value-generating work and secure compliance
- Improve employee experience

Monitor Executive, Manager, Process Owner, Expert

- Track process realization and process progression
- Analyze process results
- Audit process conformance
- Evaluate process effectiveness

In this section we are going to **deep-dive into the different concepts, technologies, activities and people engaged in each stage.**

[Book your free trustkey demo](#)



Transform



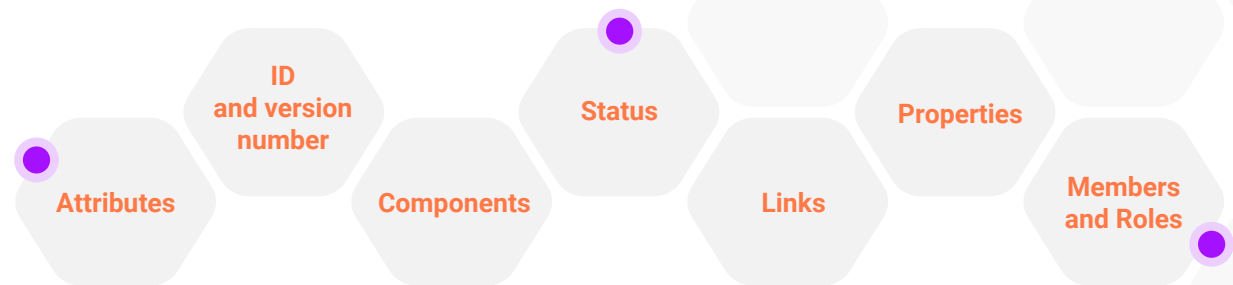
Transform static, manual or undefined actions into structured and interactive templates. Like apps in an application hub.

Every action or transaction inside your business follows certain rules or learnings. Make sure that this knowledge is captured, transferred and systematically integrated in your process environment.

The first stage of Effective Process Collaboration is for process owners to design templates based on existing documents, process diagrams or new internal or external requirements.

You can start with subjects you want to make better or completely new subjects.

Every Template consists of:



Effective Process Collaboration technology allows to systematically and dynamically aggregate these templates on boards or pages to give users easy, context driven access and always updated discovery of knowledge.

“If you can’t describe what you are doing as a process, you don’t know what you are doing.”

W. Edwards Deming

We support you in establishing templates with ready-to-use best practice templates and trainings.



Execute

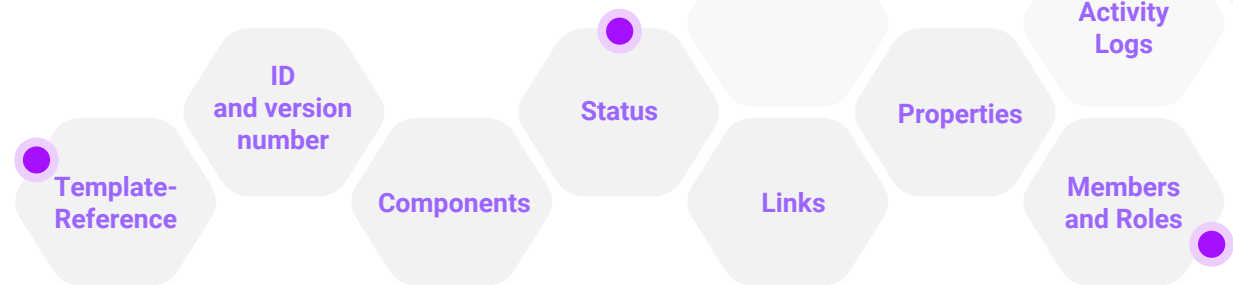


Launch templates and transfer them to directed action packs to orchestrate transactions and workflows.

During the execution of a process, the focus is on the fulfillment of the specifications and on the achievement of the planned results. Everyone in the execution team must know her or his role - means what do I have to do when.

In the second stage of Effective Process Collaboration all members of the process team work together according to the action pack specifications to achieve the planned results.

Every Action Pack consists of:



Technology assists process users to find the optimal pathway on the right process and to positively experience process collaboration. This helps to reduce inaccuracies, errors, incompleteness and inefficiencies and better joined results.

It also supports to enact and pin ad-hoc actions, document deviations, to restore, to require input, to share content and learnings and to give feedback.

Awesome Workflows

Effective Process Collaboration helps users to flow through the required actions and experience fun with it.

Vault

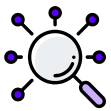
All completed action packs are automatically traceable stored in the archive.



Monitor



Monitor process performance, correct course in real-time, maintain ownership responsibilities in dynamic teams as well as analyze process results and get new insights.



Dashboard

Track process realization and process progression of your process team. Use different filters to get fast an overview what the current situation is and where to provide guidance.

Effective Process Collaboration technology allows to filter on different customizable dimensions to efficiently manage time and resources.



Results Analytics

Based on the template selection analyze captured data and export it to other analytical solutions.

The templates work like databases where all linked action data is stored.



Template Mining

Discover and monitor process interaction, collaboration and feedback. Find frictions as well as blind-spots and surface improvement opportunities.

Use powerful automated analytics to understand your process environment and the root causes for frictions.



Enhance



Enhance processes and flows to improve performance and create value.



Template Engine

Use process digitalization with quality thinking to easily further standardize, automate and streamline templates, by keeping version control, interactions and traceability. Without writing a single line of code. Quick-Wins are at your fingertips.

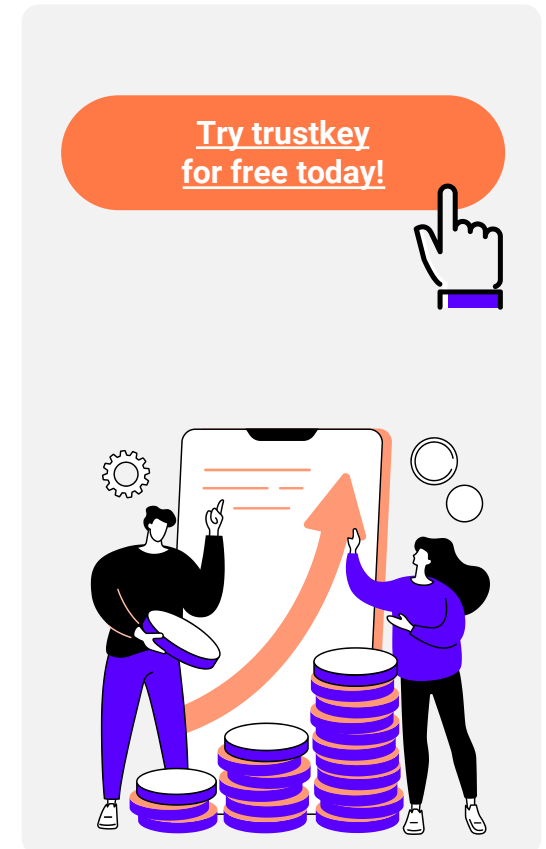


Tangible Values

Effective process collaboration drives excellence throughout the organization, reducing risks and costs, unlocking teams to focus on value-generating work, securing compliance and improve their work experience.

“An organization's ability to learn, and translate that learning into action rapidly, is the ultimate competitive advantage.”

Jack Welch



From user to enabler



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The path to Effective Process Collaboration

Transforming your process organization can sound too big to climb.
But it is simpler, faster and funnier as it seems.

The beauty of Effective Process Collaboration is that it is a **systematic and flexible assistance** to incrementally improve process performance that works at any scale.

So, whether you're using Effective Process Collaboration to support high-level business transformation or to close single support gaps or to improve a **specific slice** of the process landscape.

The underlying steps are identical:
Transform your processes, use your processes, continually monitor your processes and enhance the process effectiveness.

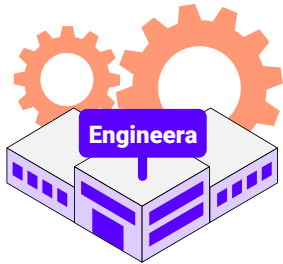
An agile approach is usually best here. Pick a process, transform the process by using interactive templates.

This section is about how to start small and scale up.

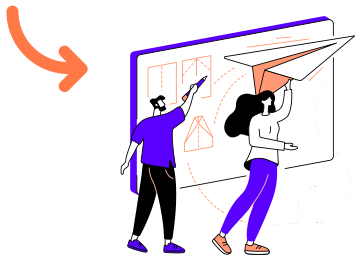


An industrial equipment manufacturer facing too much friction

Let's follow a real-life example of how a company rolled out Effective Process Collaboration to reduce friction, increase flow of information and improve organization excellence to achieve sustainable results.



Engineera is a mid-sized manufacturer of made-to-order industrial equipment for a variety of industries (e.g., aerospace, robotics and mechanical engineering) across Europe.



After winning a series of new prototypes and successfully transferring them to ongoing orders, the company is scaling up to meet new demand and customer requirements while working hard to ensure the satisfaction of the existing customers and stakeholders.



However, the management system got bigger and bigger and more unconnected systems, documents and spreadsheets caused embedded friction, stress and risks and limited their ability to grow efficiently. So, they turned to Effective Process Collaboration to make scaling easier.

Let's explore how they used Effective Process Collaboration to speed and enhance their operational excellence.

See how they took specific actions to transform, execute, monitor and enhance their processes for improved customer and stakeholder satisfaction.

Get to the root cause and empower your experts.

The embedded friction within Engineera's process environment through **fragmented systems** was impacting people at all levels across the organization:



The **employees** working in operations and supportive processes were spending too much time on analog and manual data processing.



The **process owners** were fighting keeping up with planning, updating and monitoring of process results and against constant interruptions.



Executives were too much engaged in operations as well as matters of compliance and could not invest time in future value.



The **root cause** of all this was the **fragmented flow of information** and the high efforts to achieve rapidly effective granular and continuous improvements by the experts.



The (cloud) systems in used could not cope with it. And to ask the IT department for each change was just not the right way forward.

The solution to these pain points neatly mapped to the **Transform, Execute, Monitor and Enhance framework – based on the PDCA-cycle:**

Process Transformation:

Remove frictions caused by risks, errors, inaccuracies and inefficiencies through standardization, streamlining and modularizing of processes to linked process and action templates.

Process Execution:

Orchestrate work and knowledge as well as enact processes and actions based on linked process and action templates.

Process Enhancement:

Evaluate the process effectiveness and derive new improvement opportunities.

Process Monitoring:

Aggregate and analyze the process results and process realization.



Value:

By going this change, Engineera managed to grow by 20% while more than doubling the profit.



Key lessons learned for successful change

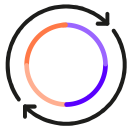
From change team to process excellence circle.



Setup **change team** and **project plan** with regular updates:
Project sponsor, Project manager and Project team.



Specify **starting point** and describe improvement objective –
process owner and process team should be part of the project team.



Run the **Effective Process Collaboration Cycle**.
Make sure to onboard all process operators to the Effective
Process Collaboration technology based on their process role.



Define **transfer matrix** as well as **integration plan**
and make sure to communicate the **team success**.



Establish a **Process Excellence Circle** to
continuously improve organization excellence.

Engineera's starting point:

Streamlining and centralization of
supplier collaboration and role-based
information and task sharing.



Reducing time to process
supplier documentation



Improve employee experience
and gain scaling power



Generate employee work time
savings for higher-value actions

Engineera's transfer matrix – from documents to information

One place for all process and quality excellence related documented information.

- Automated identification and standard for description,
- Approval by authorized users,
- Steering of distribution, access, retrieval and use,
- Automated filing and preservation,
- Automated monitoring of changes,
- Feedback tracking,
- Imaging of interrelationships,
- etc.

Starting Point

trustkey – Documented information

Document	(Document matrix)	Transformed	Template	Record
Handbook / Policies	Document Number Version Number ...	✓	Template: T-... (Version) ...	Knowledge Page: K-... (Version) based on T-...(Version)
Process Descriptions	Document Number Version Number ...	✓	Template: T-... (Version) ...	Knowledge Page: K-... (Version) based on T-...(Version)
Work Instructions	Document Number Version Number ...	✓	Template: T-... (Version) ...	Action Pack: A-... based on T-...(Version)
Forms	Document Number Version Number ...	✓	Template: T-... (Version) ...	Action Pack: A-... based on T-...(Version)

Archive

The entire (Quality) Management System is built into trustkey

High-Level Structure	based on ISO 9001 EN 9100	Knowledge Base Examples		Workspace Examples	
		Notebooks	Pages	Boards	Templates
Context of the organization	<ul style="list-style-type: none"> External and internal issues Interested parties & their requirements Scope of management system Process matrix and process / work descriptions 	Handbook – Chapter: Context of the organization	<ul style="list-style-type: none"> External and internal issues Interested parties / stakeholders Scope Process matrix & descriptions 		
Leadership	<ul style="list-style-type: none"> Leadership and commitment Policy Organizational roles, responsibilities & authorities 	Handbook – Chapter: Leadership	<ul style="list-style-type: none"> Leadership & commitment Policy Role descriptions 	GM, QM HR	Business reports, updates, stakeholder surveys Job description, responsibility matrix
Planning	<ul style="list-style-type: none"> Risks and opportunities Quality objectives Planning of changes 	Handbook – Chapter: Planning	<ul style="list-style-type: none"> Risks and opportunities Objectives Planning of changes 	QM/Risks QM/Objectives QM/Changes	Risk assessment Evaluations, trustkey controls Change requirement
Support	<ul style="list-style-type: none"> Resources Competence Awareness Communication Documented information 	Handbook – Chapter: Support	<ul style="list-style-type: none"> Resources Competence Awareness In- & external communication Documented information 	HR, QA, IT, RM HR, Purch. HR	Qualifications, calibrations, emergency/maintenance/installation plans, trustkey controls Qualifications, recruiting, contracts, assessments, trustkey controls Onboarding, training trustkey controls trustkey controls
Operation	<ul style="list-style-type: none"> Operational planning & control Requirements for products & services Design & development of products & services Control of external provided processes, products & services Production and service provision Release of products and services Control of nonconforming output 		<ul style="list-style-type: none"> Process operational planning Process sales Process design & development, Company standards Process purchasing Process production, Work/inspection instructions, Special processes instructions Process quality assurance, Inspection instructions Process non-conforming output 	DevOps, Project Inquiry, Order Project Order Order Order QM/CAPA	Project/QM/risk/configuration/control/work/inspection plans Customer interaction report, checklist inquiry, manufacturability / risk assessment Engineering order requests, reviews & reports, action plans, minutes Assessments, supplier selection / questionnaire, QAA, contracts, release of technical and quality documentation, action plans, minutes Completed production/work/inspection/maintenance plans, FAIs, product marking, complaints, verifications, production change requests Completed inspection/release plans, special releases NCR, 8D-report, service ticket, complaints
Performance Evaluation	<ul style="list-style-type: none"> Monitoring, measurement, analysis & evaluation Internal audits Management review 	Handbook – Chapter: Performance	<ul style="list-style-type: none"> Process evaluation Process audit Process review 	QM/Audits QM/Reviews	Process effectiveness reports, trustkey Analytics Audit program, audit plan / report, NCRs, CAPA, action plans, minutes, Process Effectiveness Reports Management review, action plans, minutes
Improvement	<ul style="list-style-type: none"> Nonconformity and corrective action Continuous improvement 	Handbook – Chapter: Improvement	<ul style="list-style-type: none"> Process corrective actions Process improvement 	QM/CAPA QM/CAPA	NCR, 8D-report, service ticket, complaints Reviews, process effectiveness reports, action plans, minutes

Engineera streamlined its tool and system landscape and utilizes the empowerment of employees

Integration plan

ERP (Resources) / Finance



Knowledge and Actions

Effective Process Collaboration
self-designed by process experts

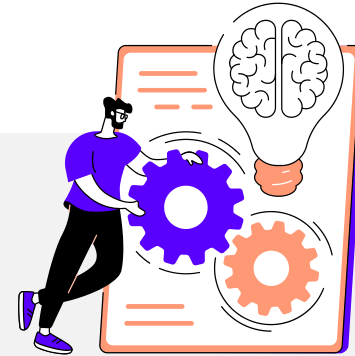


File System

Office

Engineering Systems

Further integration,
replacement and
streamlining



One tool with interactive templates for each process and action – instead of a tool for each process.

With trustkey Engineera can:



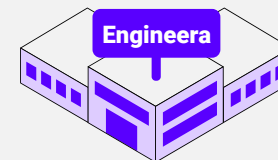
reduce costs

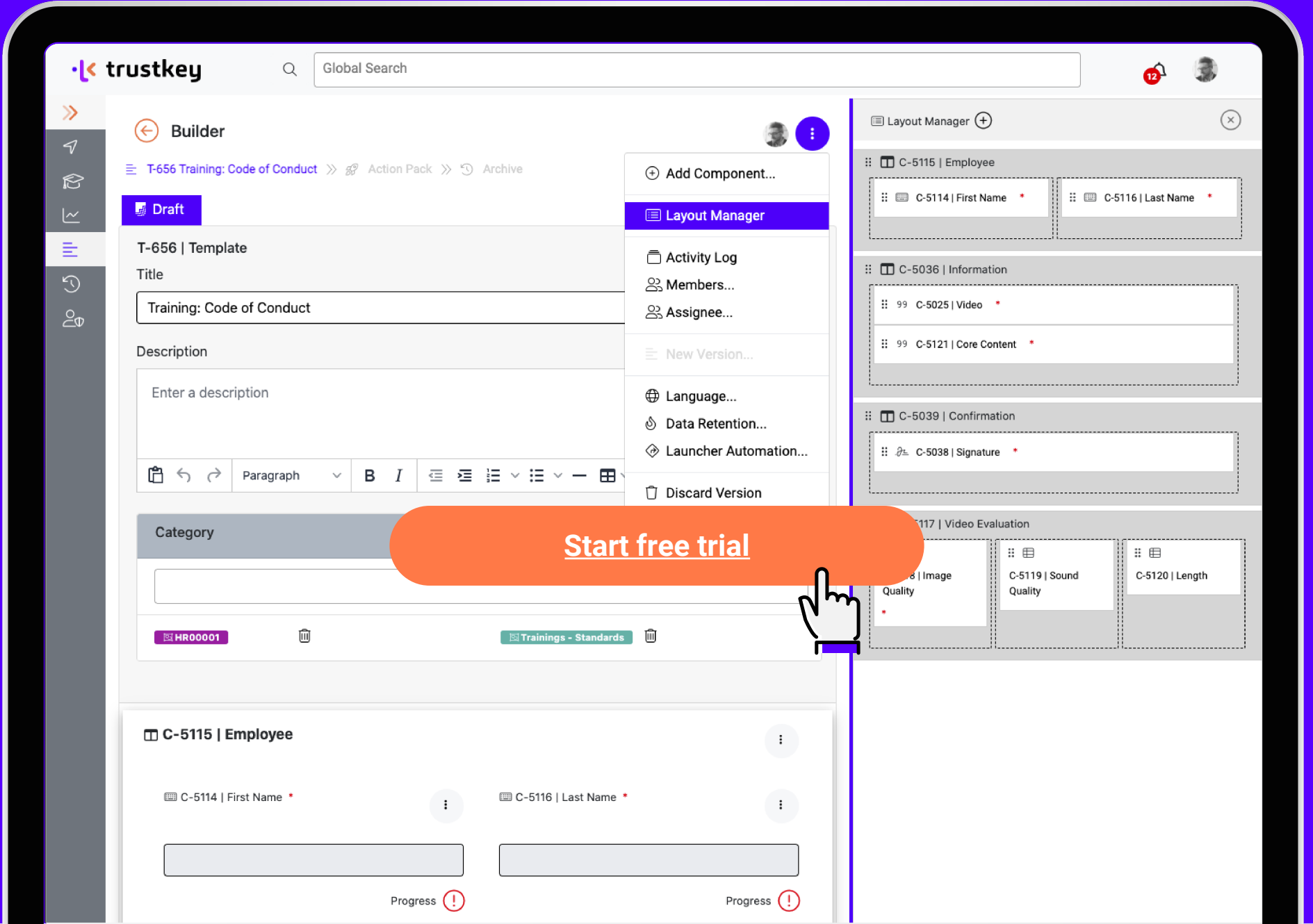


save time



secure compliance





We provide role-specific manuals including best practices

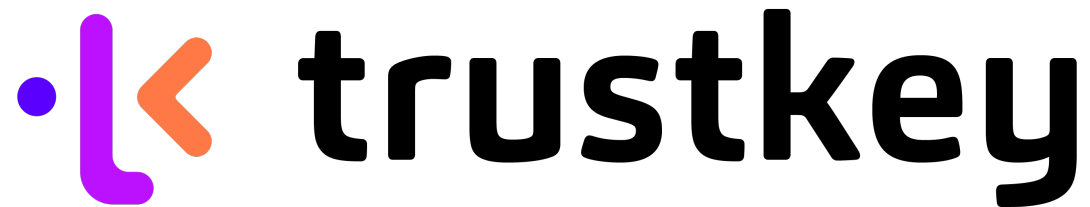
Examples



For more guides and customer success stories visit:

www.trustkey.eu





... **Awesome** **workflows** that are **>** **fun to use**



>>>>>>>>>> **Developed and operated in Germany**

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