

## HOW TO: DEFINE YOUR MANAGEMENT SYSTEM

### SCOPE AND OBJECTIVES

Clarify the scope of the intended system (both immediate and longer term).

Clarify your objectives from defining the system. Are you doing this for clarity, consistency, compliance? Or to simplify, standardise, improve?

### PREPARATION

Assess what you have now. Do you have “traditional” narrative procedures? Are they correct and up-to-date?

Do you (and your people) think in process terms? Is it clear who “owns” your processes?

Do you (does anyone) know exactly how you operate now?

Draw up a register of existing documents and other reference data (forms, work instructions, checklists, spreadsheets, web pages) you need as part of your system.

Do you have a numbering system for documents? Can it be improved or simplified?

Define a (logical) structure for your system (processes, documents, departments).

Decide how to group i) processes and ii) documents. Remember that “categories” can be used to filter and consolidate processes, documents and groups.

Make sure that you have consistent job titles (“Role” names). You will probably need some “generic” roles as well.

Decide how to group Roles – eg by Department. Remember that you can associate specific Roles with generic Roles.

Consider how you want to use some of the “generic” fields such as “Process Comments” (Scope and Objectives“?), Custom (“Business Risks“?) and redefine their names in a “language” file.

### HOUSEKEEPING

Decide where you will keep the dataset (for access and for backup).

Decide where you will publish the electronic version of the system and give suitable access rights for viewing.

Define a policy for updating and publishing reference documents. Perhaps have each department look after its own documents and pass authorised versions to the System Manager for publication into a “referenced document” folder with appropriate access rights for users – subdivide by document group if appropriate.

Decide how to define your processes. Perhaps work from existing narrative procedures or start afresh. Process Owners are accountable for the accuracy and suitability of the process descriptions.

### IMPLEMENTATION

Make someone responsible for:

- i) managing the system (needs to know the business)
- ii) making changes (needs to know the software).

Design a “picture” of the system if required – make it easy to navigate, and use it as a “Welcome” page.

“Sell” the system to users. Why should they use it? What are the benefits for them?

Consider including features which will encourage them to access the system (set up direct links for your telephone directory, commonly accessed forms ...)

Emphasise use of the “Roles” view for “filtering” tasks to show detailed role involvements, the search features... and remember to investigate the wide range of analysis reports available.