

# Personal Process & Tool Self-Assessment – Triggering Structured Self-Improvement

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**Abstract:** In this paper we discuss an idea for a framework that enables a knowledge worker (KWer) on the one hand to evaluate her own personal processes and tools and on the other hand to identify improvement options for herself in a structured endeavor. We show this using the example of meetings. A KWer working, e.g., in international research projects spends 10% of the overall work time on meeting management, i.e., not dealing with the content but administrating meetings like, e.g., writing, formatting and sending out meeting minutes. However, a situation analysis of several KWers in the research domain shows us that a number of inefficiencies do exist which lead to an overall sub-optimal personal process. Our framework enables the KWer to assess her personal productivity situation by using a checklist with common process inefficiencies, e.g., major inefficiencies in meeting management are process loops and media breaks. The KWer then leverages a set of guided procedures to identify potential options for getting help to improve the personal situation. These guided procedures consist on the one hand of accessing the personal social network and on the other hand a structured problem resolving approach helps the KWer to apply best practice process knowledge and suitable tools to identified inefficiencies. Thus, the KWer can quickly identify suitable contacts or articles to improve the personal process on her own.

## 1 Introduction

*Meetings* are an important element of a knowledge worker's (KWer's) work. For example, for a researcher working in an international research project, they eat up about 30% of their time. Here, *meeting management* accounts for 10% of the overall time that KWer spends at work, i.e., not dealing with the content but administrating meetings like for example writing, formatting and sending out meeting minutes. One third of the meeting-related time is spent solely on administrating and managing meetings whereas the remaining two thirds are spent on meeting content. Thus, a KWer spends 10% of the overall work time on meeting management. This represents for example 500 Euros monthly meeting management cost per employee to a company in case of 5.000 Euros average monthly employee cost.

Meeting management is one of multiple *personal supporting activities* [Gr09] as part of a personal process that a KWer personally conducts to organize and manage her-self. Other personal supporting activities are for example personal task management and pers-

onal information management. Personal supporting activities lay the groundwork for the *personal primary activities* [Gr09], where the KWer deals content-wise with her main tasks to produce the results she is tasked with.

However, a number of personal inefficiencies lead to an overall sub-optimal personal process – a result we found in an (yet unpublished) analysis conducted among KWers in the research domain. These inefficiencies can be categorized into the dimensions of process flow, organizational structure and tool support / information (see table 1 below for an example). These inefficiencies represent a major impairment to personal productivity given the high importance and significant time spending of these processes.

KWerS often don't ask for help to improve personal processes due to various reasons. For example KWers can benefit in three dimensions from consulting experts or coaches: First, experts bring in an external view and fresh ideas on otherwise long-term established processes. Second, experts have dedicated skills and knowledge in productivity optimization that offers the KWer new perspectives. Third, experts pursue a methodological approach that can improve the optimization speed. Mentioned reasons in our study for not consulting with experts were, e.g., that the KWer doesn't have the time for dedicated improvement sessions ("no time to sharpen the saw" - problem).

The framework idea presented here is to *self-enable the KWer to identify and improve the personal processes* in a structured manner and initiate a learning process. Triggering a KWer's thoughts from an external view by starting a self-assessment helps the KWer directly and can serve as input for further consultations with experts. The KWer are in any way experts for themselves as they know best what works and what doesn't for their personal situation and work habits.

The remaining paper is structured as follows. In section 2 we show a framework, how a KWer can self-assess the personal productivity and related personal processes. The goal is that the KWer can herself evaluate her own personal processes, organizational structures and tools. In section 3 we then show, how the KWer can identify for herself improvement options using the personal social network and research methods in a structured endeavor. Finally, we conclude in section 4 with a summary and outlook.

## **2 Self-Assess Personal Productivity & Personal Processes**

The KWer can self-assess her personal productivity and related personal processes by using a checklist exposing common process inefficiencies and examples. A checklist is provided for each personal process. Table 1 presents a checklist to analyze the personal meeting management process for inefficiencies.

The checklist is organized in three categories of process flow, organizational structure and tool support / information. Each of them represents a distinct perspective on the KWer's personal process, in this case meeting management. Here, major reasons for inefficiencies are process loops and media breaks.

<b>Process flow</b>	<b>Organizational structure</b>	<b>Tool support / information</b>
<i>Process loops,</i> e.g., question & answer rounds to clarify agenda	<i>Responsibilities not clearly assigned,</i> e.g., uncertainty in meeting on who does what	<i>Tools don't support meeting process (parts),</i> e.g., no reminders, manual work on following-up tasks
<i>Process goal is not specified,</i> e.g., no optimization of meeting organization	<i>Coordination processes take too long,</i> e.g., waiting for responses	<i>User interface not tailored to user needs,</i> e.g., slow input speed for jotting meeting minutes
<i>Low output quality,</i> e.g., meeting actions don't get executed or communicated information gets lost	<i>Not enough transparency,</i> e.g., low visibility on action items status among partners	<i>Heterogeneous tool support,</i> e.g., several tools for calendaring, minutes, etc.
<i>No quality control for results,</i> e.g., meeting minutes differ from creator to creator		<i>Tools not integrated across overall process,</i> e.g., need to copy & paste information between tools
<i>No delegation of non-core process parts,</i> e.g., not delegating date negotiation to assistant		<i>Media breaks,</i> e.g., put minutes into document, document into email

Table 1: Checklist on Process Inefficiencies Assessment

To conduct the self-assessment, the KWer can follow these steps: First, look at the personal process and decompose into activities or small steps. Using the checklist, the KWer can identify inefficiencies. Finally, the KWer prioritizes the inefficiencies, i.e., determines the inefficiencies with most impact on personal performance in the dimensions time, cost and quality.

### 3 Getting Help to Remove Inefficiencies in Personal Processes

Getting help to remove inefficiencies in personal processes is the second part of the proposed framework for personal productivity improvement. Based on the analysis result, the KWer can leverage a set of guided procedures to identify options for getting help.

Table 2 gives an overview on the options. These guided procedures consist on the one hand of accessing the personal social network and on the other hand map best practice process knowledge and suitable tools to an inefficiency category. Thus, the KWer can quickly identify suitable contacts or articles to improve the personal process.

	<b>Process flow</b>	<b>Organizational structure</b>	<b>Tool support / information</b>
<b>Personal social network</b>	Ask around how others deal with the particular problem	People working in a similar organizational structure	IT-knowledgeable person
<b>Knowledge base</b>	Business process management literature	Organizational restructuring literature	Web2.0 application catalogues, weblogs with reviews

Table 2: Guided Procedures to Identify & Discuss Personal Process Improvement

For example, when the KWer identified missing tool support as the major inefficiency in the personal meeting management process, she can on the one hand screen her personal social network for an IT knowledgeable person who she can ask questions. This person can in addition facilitate the tool selection process and further administrative and technical questions. On the other hand, she can access dedicated application catalogues like, e.g., Go2web20 [Go10] for Web2.0 applications or browse specialized articles on weblogs for advice like, e.g., Lifehacker [Li10].

As well, using social networks on the web helps to informally seek help by posting a news item stating some of the found inefficiencies. Depending on the interests of the friends, an interesting breadth of ideas and solutions emerge.

## 4 Summary & Outlook

We discussed a framework where a KWer on the one hand can evaluate her own personal processes and tools and on the other hand can identify improvement options for herself using the personal social network and research methods in a structured endeavor. This helps KWers to improve their personal processes as a core element of their work. This framework can be supported by a tool itself ensuring methodological approach. Even further in the future, the KWer can build a customized tool and user interface based on the findings on how to improve the process [Gr09a].

## References

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