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#### "A Tale Of Two Clients"

This is a little comparative analysis between two clients. Both companies are similar in size based on annual sales. Both have a similar business model even though they are in different industries. Both companies are privately owned. Both companies are equivalently staffed in terms of job roles. Both companies contracted with me to assist with operational improvements including documenting processes and procedures.

I inform my clients that they need to take ownership and responsibility for the process documentation (including flowcharts) as part of our projects together. This includes making sure what's written matches what happens in reality even as improvements are being implemented. In this way I teach my clients how to take their destiny into their own hands and not rely as much (or so much) on outside help. Typically my clients love this educational exercise because process documentation and its ownership is something they've desired for a long time but were unable to achieve on their own.

At one client process documentation was started and placed into the hands of department management. Different department managers took the task of creating their documents and process flows with different degrees of interest and priority. Quite honestly I saw some work product that looked like it came from an elementary school student and it was very disheartening.

At the other client the entire staff – customer service, accounting, purchasing, and warehouse – is involved in the creation, review, editing, and field-testing of the documentation I produce. This client is actively engaged in the entire process and wants to – is excited to – take ownership of the documentation.

At the first client one manager made the comment to me that I never finished the process documentation, a statement in-and-of itself that really tells the tale. At the other client they are excited that after several starts-and-stops they will finally have an operations manual that accurately describes their business and can be used to train new employees and improve the performance of current staff; a document that they will have full ownership and control over because it's being written and delivered in Microsoft Word®.

At the first client there is chaos, albeit less since I was on the case. At the other client there is control and there will be more once the operations manual is completed. At the first client employees work excessive hours including weekends on a regular basis. At the other client the employees – including management – leave by 5:00 and weekends are for personal lives, not company business.

Like many companies both clients struggled through the down economy of the past several years. The first client continues to struggle; the other client is planning for growth in the near future. The first client has given some office employees long overdue raises; the other client posts weekly and monthly incentive programs that enable hourly employees to earn more income. The first client is shrinking its payroll through reductions and attrition; the other client is adding employees.

At the first client the office is in a continual hectic state; at the other client the office atmosphere is quiet and organized. Transaction error rates at the first client are relatively high, at the other client they are impressively low. At the first client there are numerous scheduled meetings that occur during each week. At the other client I'm not aware that there are any regularly scheduled meetings; instead people just communicate as needed.

What opinions do you draw from the tone set by each company's owners and managers? What do you think about the priorities being set at each company?

Process documentation results in chaos being controlled and enables consistency to become normalcy. If you don't write down the right things to do the chances are too great that the wrong things will be done; this will then require more work to recurrently right the repeatedly wrong,



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