

## CHALLENGES

An upcoming audit without enough documentation to support its processes and procedures

Documentation required to pass the audit, ensure process stability, use as a basis for training and identify performance objectives

## APPROACH

Conduct a thorough analysis to identify current processes and operations

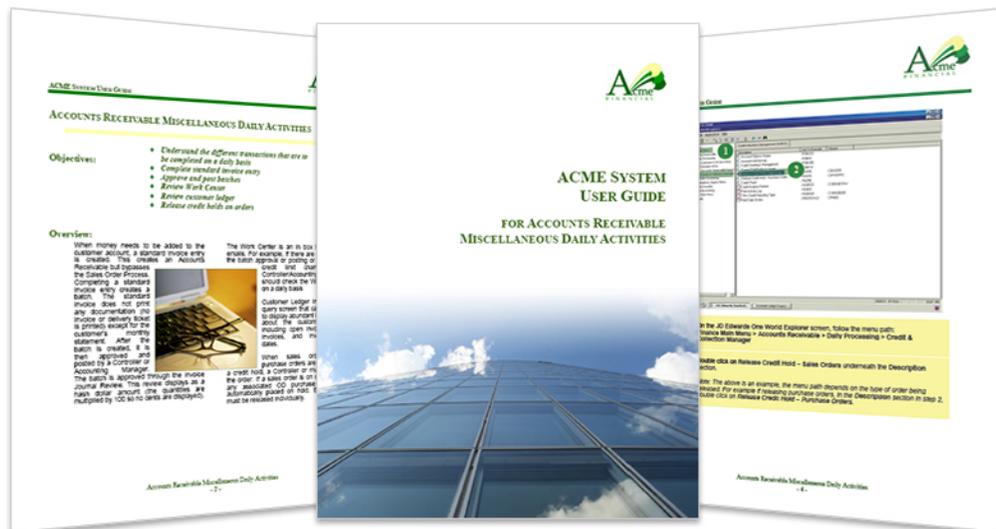
Define and document operations, streamline processes and identify key procedures and processes to document

Act as mentors, review internal writers' documents, provide constructive feedback and coach them on how to make the end product appropriate for the company's needs

## RESULTS

A successful audit and a set of streamlined process flows and procedural documents that clearly communicate a consistent, united set of business processes for each area of the company

A team of trainers and writers that could support future documentation initiatives after project completion



A leading global financial services company was facing an audit, and it needed enough documentation to support its internal processes and procedures. Some departments had existing documents, but others had nothing. The company wanted to develop documentation for several reasons:

- To pass the audit
- To insure the stability of their internal processes
- To use as a basis for training
- To identify performance objectives

The organization looked to Michaels & Associates to augment their internal staff, provide expertise and meet the tight deadline. A team of our consultants worked with existing trainers and writers in the company. Together, we focused on analyzing and developing documentation for several areas within the organization. Each area had a team dedicated to documenting its business processes.

## ANALYSIS ADDRESSES OPERATIONAL GAPS

To begin analysis, teams interviewed subject matter experts (SMEs) to identify each area's business processes and operations. As separate teams analyzed their areas, they recognized a number of operational gaps and opportunities for process improvements. Then, as the teams compared their findings, they also discovered that the areas had different processes for similar tasks.

To address these issues, the Michaels & Associates team worked with the client to clearly define and document operations, streamline similar processes between multiple areas and identify the key procedures and processes to document. During the development phase of the project, we also facilitated meetings to determine best practices.

The value of mentoring by M&A was strongly evident as writers honed their skills—and inspired at least one budding writer to share and submit personal writing for publication outside of the work arena.

#### CLIENT STORY

Not only did the Michaels & Associates consultants learn the company's processes, but they lived them too. One day, a consultant who was documenting security procedures refused to allow someone to "tailgate" her through the security checkpoint. That someone turned out to be the company's president, who was proud of his "employee" for adhering to company policies and was amazed to find his "employee" was a Michaels & Associates consultant.



#### DOCUMENTED PROCESSES RECEIVE A STANDING OVATION

Our consultants ensured that every identified process was documented and reviewed by a committee consisting of SMEs from all areas of the company. The committee was so pleased with the documentation that its members gave Michaels & Associates a standing ovation when they learned the budget was augmented to allow us to keep documenting processes until after the audit.

In the end, the client's documentation team delivered a set of streamlined process flows and procedural documents that communicated a consistent, united set of business processes for each area of the company.

Michaels & Associates consultants also ensured that the company's trainers and writers could support the documentation after project completion. During the entire engagement, our skilled consultants adopted individual writers from the business and acted as mentors, reviewing their documents, providing constructive feedback and coaching them on how to make the end product appropriate for the company's needs.

This was an engagement of which Michaels & Associates is particularly proud. Not only did we leave this organization with usable ongoing documentation, we lived the proverb of "teach a man to fish" and enabled the company to maintain that documentation on their own. The financial services firm was impressed in knowing they had made a strong commitment to the company's future and invested wisely in their biggest asset—people.