Beaver Works Project

Inventory of Business Operations Tasks
Compiled tasks submitted by business operation and business office employees

- Reviewed tasks for redundancies and omissions (i.e. what tasks are missing and not how tasks are being completed)

Used a structured coding process to assign codes to each task

- The assigned codes correlated to the role(s) responsible for completing that particular task
  - Challenged the Beaver Works core project team to consider role(s) that complete the task rather than the function/unit/department

Example of coding on the next slide
Example of Inventory Coding

Example of Coding

Each code represents a role within business operations.

<table>
<thead>
<tr>
<th>Tertiary Codes (Roles)</th>
<th>Secondary Codes (Roles)</th>
<th>Primary Codes (Roles)</th>
<th>Functional Area Tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Analytics</td>
<td>Reporting</td>
<td>Financial</td>
<td>Annual cash flow report is created - additional details are requested throughout the year to mitigate liquidity risk / overcommitments</td>
</tr>
<tr>
<td>Communication</td>
<td>Customer Support</td>
<td>Financial</td>
<td>Answer central and BC accounting staff questions</td>
</tr>
<tr>
<td>Payroll</td>
<td>Customer Support</td>
<td>Financial</td>
<td>Answer pay related questions</td>
</tr>
<tr>
<td>Training</td>
<td>Scholarship</td>
<td>System Support</td>
<td>Answer Scholarship System (Reimbursement System) Questions</td>
</tr>
<tr>
<td>System</td>
<td>Payroll</td>
<td>Support</td>
<td>Answer timesheet related issues</td>
</tr>
</tbody>
</table>

Since tasks often involve more than one role, multiple codes were assigned to each task.
Objectives

The inventory has been used to inform the following project objectives:

- Determined the roles or areas of interest for conducting the focus groups
  - Also helped inform who should be involved with each of the focus groups
- Provided insight into the interactions that exist between roles
  - An example is provided on the next slide

In the future, the inventory will be used to:

- Inform future operational excellence projects
  - Provide a baseline of common processes and tasks
  - Ensure a full scope is considered for each project
Example Insight from the Inventory

- Example of interactions between business analytics and budgeting based on the inventory

- Number of tasks coded with both business analytics and budgeting

- Other roles that had the highest number of interactions with budgeting

### Business Analytics
- Grants: 7
- Reporting: 10
- Forecasting: 12
- Operational Excellence: 6
- Financial: 19

### Budgeting
- Financial: 39
- Grants: 10
- Forecasting: 9
- Reconciliation: 9
- Customer Support: 7

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