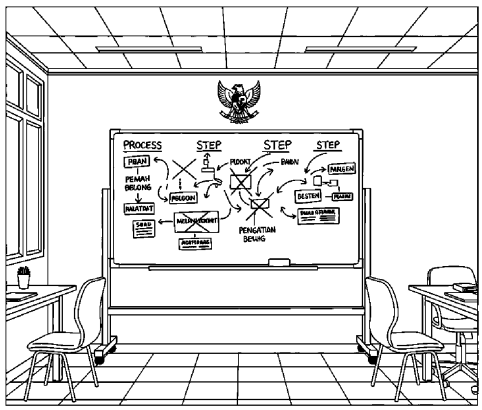
NICHE-SEARCH

WORKSHEET 5 OF 9

Redesign vs Incremental Improvement Decision Matrix

Use this before committing time to either path. Honest answers to seven questions determine which approach fits the actual condition of the process.



Complementary worksheet for
Business Process Reengineering
by Ibrahim Anwar

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SECTION 1

What This Is For

The most common error in process improvement is applying the wrong tool. Incremental elimination -- identifying and removing unnecessary steps -- works when the underlying process is sound and problems are surface-level. Full redesign from output is required when the architecture is wrong: when the process was built for a different scale, a different output, or a different team than the one running it now. Applying incremental tools to an architecturally broken process wastes effort. Redesigning a process that only needs a few steps removed is an overreach that burns management time and disrupts a team that was largely functional.

This matrix exists for the moment before a decision is made. It takes seven questions about the process's current condition and scores them against a clear threshold: three or more 'Yes' answers means the architecture needs rebuilding, not refinement. Fewer than two means incremental work is the right path. The matrix takes 30 minutes to complete honestly and removes weeks of debate from the redesign-or-not conversation.

SECTION 2

Benefits

What you get when you actually run this worksheet on a real situation:

- Prevents the most common overreach: a full redesign project launched against a process that needed step elimination and one new handoff standard.
- Prevents the opposite error: incremental improvement applied to a process with an architectural flaw, producing refined steps on a broken foundation.
- Creates a documented decision record explaining why redesign was chosen or deferred -- useful when the decision is reviewed six months later.
- Surfaces the ERP-preparation question directly: a planned system implementation within six months is a hard trigger for standardization before configuration.
- Focuses the redesign conversation on observable conditions rather than on which manager feels the process is broken.

SECTION 3

Framework To Use

Seven-Question Architecture Test

Seven diagnostic questions scored as Yes, No, or Partial. Three or more Yes answers indicate architectural failure requiring redesign from output. Fewer than two indicate incremental improvement is sufficient.

REDESIGN VS INCREMENTAL -- DECISION PATH

SECTION 4

How To Use

Follow these steps in order. Each one builds on the previous.

1. Select the process you are evaluating. Have its most recent process map or SIPOC in front of you. If no documentation exists, you cannot answer questions 1 and 3 accurately -- document first.

2. Answer each of the seven questions for that specific process. Do not answer for all processes at once. Each process gets its own matrix.

3. For question 1 (percentage of steps without a clear reason tied to output): count the steps in the process map and attempt to write a one-sentence explanation for each. Any step you cannot explain in one sentence tied to the output is a candidate for the Yes count.

4. For question 3 (staff variation above 20%): use measured data from the Weekly Step-Time Tracker if available. Do not estimate.

5. For question 5 (cannot absorb 2x volume without owner decisions): trace the process at double the current typical volume and identify every point where an owner or single approver must act before the process continues.

6. Mark each answer Yes, No, or Partial. For scoring: Yes = 1 point, Partial = 0.5 points, No = 0 points. Total the score.

7. Apply the threshold: score >= 3 means redesign from output. Score <= 1 means incremental elimination. Score 1.5-2.5: assess which questions scored Yes and whether they are architectural or operational.

8. Record the decision and the score. File with the process documentation so the reasoning is available when the decision is revisited.

SECTION 5

Example Use

A service business with 60 staff is preparing to implement ERP in four months. The project manager asks whether three critical processes need redesign before configuration or whether the existing processes can be configured as-is.

Process evaluated: procurement (purchase request to payment).

Q1 (steps without clear reason): The process map has 14 steps. The project manager can explain 8 of them in one sentence tied to the output. Six cannot be explained without referring to historical incidents. 6/14 = 43%. Answer: Yes.

Q2 (output no longer right): The process was designed when the business had one procurement officer and one approval level. Now there are three departments, two approval levels with no documented criteria, and a requirement for three vendor quotes above $500. The current output definition does not reflect these requirements. Answer: Yes.

Q3 (staff variation above 20%): The tracker was not run. The project manager asks two procurement staff separately how long a standard purchase request takes end-to-end. Answers: 2.5 days and 4.5 days. Variation: 80%. Answer: Yes.

Q4 (recurring problems at same steps): The last three months of incident logs show approval-step errors in months 1, 2, and 3. Answer: Yes.

Q5 (cannot absorb 2x volume): At current volume, one procurement officer handles the process. At 2x, the owner's approval gate becomes the bottleneck. Answer: Yes.

Q6 (more than 3 approval steps, fewer than half with criteria): Two approval steps, neither with documented criteria. Score: Yes.

Q7 (ERP go-live within 6 months): Yes, four months away.

Total score: 7 Yes. Decision: full redesign from output is required before ERP configuration begins. The project manager reschedules the first consultant session from next week to six weeks out, allocating the gap to output-based redesign.

SECTION 6

The Worksheet

Tear this out, copy it onto a fresh sheet, or fill it in directly.

Redesign vs Incremental Improvement Decision Matrix

Use this before committing time to either path. Honest answers to seven questions determine which approach fits the actual condition of the process.

QUESTION	ANSWER (YES / NO / PARTIAL)	SCORE (1 / 0.5 / 0)	EVIDENCE OR NOTE
More than 40% of steps cannot be explained with a reason tied to the current output			
The output the process was designed for is no longer the right output for this business			
Staff running the same process show more than 20% completion-time variation (measured, not estimated)			
Problems recur at the same process steps despite repeated corrections			
The process cannot absorb 2x current volume without adding owner decision points			
More than 3 approval steps exist and fewer than half have documented criteria			
A planned ERP or WMS go-live is within 6 months			

SECTION 6 (CONTINUED)

Reflection Prompts

After filling in the worksheet on the previous page, work through these.

1. Total your score. Three or more (score >= 3.0): redesign from output is required. Use the Output-Based Design Session Guide (Chapter 4) as the working format. Do not start ERP configuration until the redesign is complete.

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2. Score below 2: incremental elimination is the right tool. Use the Three-Question Elimination Sheet (Chapter 5). Do not redesign what does not need it -- the disruption cost outweighs the gain.

SECTION 7

Tips and Traps

TIPS

- Answer question 3 with measured data, not intuition. If no tracker data exists, run a one-week tracker before scoring this question. An estimated answer to the variation question produces an unreliable matrix result.
- Complete the matrix with the process owner present, not alone. The process owner will answer questions 1 and 2 differently from management, and both perspectives are needed for an honest score.
- A Partial answer scores 0.5. If a question is genuinely borderline, Partial is the right mark. Do not round every Partial to Yes to justify a redesign decision already made.
- The matrix result is a recommendation, not a mandate. If the score says redesign but the business does not have the management capacity to run a redesign in the next three months, schedule it and use elimination in the interim.

TRAPS

- Using the matrix to justify a redesign decision already made rather than to test whether redesign is warranted. If the answers are being shaped to produce a predetermined score, the matrix is being used as theater rather than as a diagnostic.
- Running the matrix without a process map in front of you. Questions 1 and 4 require counting steps and identifying recurring problem points. Answering from memory produces overconfident Yes answers.
- Treating a high score on this matrix as authorization to begin redesign without management commitment to the parallel-run transition (Chapter 7). The matrix determines whether redesign is needed; it does not guarantee the transition will succeed.
- Applying the matrix to a process that has never been documented. Document it first, even roughly. A matrix run against an undocumented process is being scored against assumptions.

SECTION 8

Appendixes

Appendix A -- Score Interpretation Table

Score	Interpretation	Next action
0.0-1.0	Incremental sufficient	Three-Question Elimination Sheet (Chapter 5)
1.5-2.5	Borderline -- assess which two	Check which questions scored Yes. Both architectural? -> redesign. Both operational? -> eliminate first, reassess
3.0-5.0	Redesign warranted	Output-Based Design Session Guide (Chapter 4)
5.5-7.0	Redesign urgent	Do not configure any system until redesign is complete

Appendix B -- Architectural vs Operational Questions

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Architectural questions (failures here mean redesign):
  Q1: Steps without explanation tied to output
  Q2: Output itself is wrong for the current business
  Q5: Cannot scale without owner as single decision point

Operational questions (failures here may be solvable by elimination):
  Q3: Staff variation above 20%
  Q4: Recurring problems at same steps
  Q6: Too many undocumented approval steps

ERP trigger (always escalates to redesign):
  Q7: System implementation within 6 months

If only Q3, Q4, Q6 score Yes (no architectural failures):
  Standardize and document first.
  Elimination may close the gaps without a full redesign.
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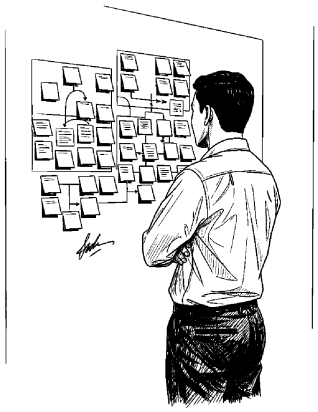

WHERE THIS WORKSHEET COMES FROM

Business Process Reengineering

A Process That Has Run a Long Time Is Not Necessarily a Correct Process

by Ibrahim Anwar

This worksheet is one of nine in the *Business Process Reengineering* companion worksheet pack. The full pack is grouped into three categories: high-volume worksheets you can run weekly, niche-search worksheets for rare but high-value situations, and specific-case worksheets that walk you through a single concrete scenario.

Every framework, decision filter, and figure used in these worksheets is drawn from the chapters of the source book. The book sets the diagnosis, the worksheets give you the form to act on it.

Read the source book on Google Play Books:

https://play.google.com/store/books/details?id=VYvXEQAAQBAJ

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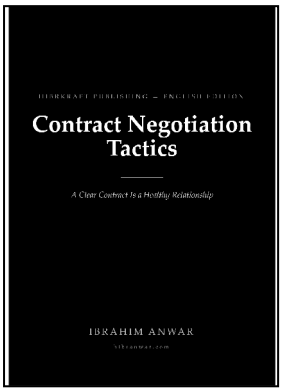
More from the Operator's Handbook

Each handbook is a 9-worksheet companion pack like this one. Tap any cover to open it on Google Play Books.



NO. 13 · OPERATOR'S HANDBOOK

Lean Operations Principles

Eliminate Waste Before Adding Capacity

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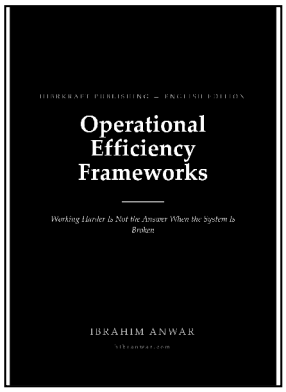

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Operational Efficiency Frameworks

Working Harder Is Not the Answer When the System Is Broken

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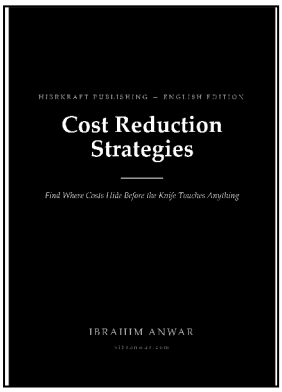

NO. 01 · OPERATOR'S HANDBOOK

Cost Reduction Strategies

Find Where Costs Hide Before the Knife Touches Anything

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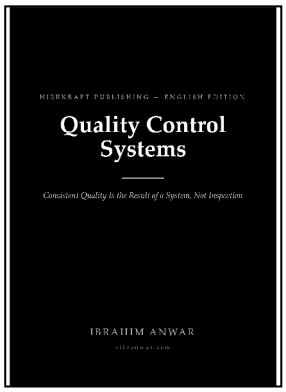

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Quality Control Systems

Consistent Quality Is the Result of a System, Not Inspection

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