

There's always the low-tech way of managing a process, too

devblogs.microsoft.com/oldnewthing/20100715-00

July 15, 2010



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One of my colleagues had a problem with content management. I've changed the underlying scenario but the principle is the same.

Is there a way to require that someone other than the author of a proposal sign off before the proposal tracking system accepts it? We had an issue where somebody wrote up a proposal, and due to a miscommunication, the proposal coordinator thought the proposal was ready and submitted it prematurely. This happened to another team in our group, and we want to make sure we don't make the same mistake.

Another colleague explained:

This is a people problem, not a technology problem. One way to work around it is to tell the proposal coordinator, "Don't submit the proposal until I sent you email that says it's okay to submit the proposal."

I agree that this was a people problem, but the offered solution suffers from the same miscommunication problem as the original. The proposal coordinator might ask, "Is the proposal ready?" and the author responds, "It'll be ready tomorrow." The next morning, the proposal coordinator submits the proposal assuming that the author's response meant "Submit it tomorrow," when the author actually meant "You will get an email message from me tomorrow when it's ready." My colleague responded that the technique still has a single point of failure: An error by one person (the proposal coordinator or the proposal author—you decide who is at fault) results in the proposal to be submitted prematurely. We want to make sure two people sign off on the proposal before it is submitted. I proposed a method popularized by Henry Ford: The assembly line.

- Author writes proposal. Places proposal in Location 1.
- Proposal is reviewed by reviewer A. When it passes review, it is moved to Location 2.
- Proposal is reviewed by reviewer B. When it passes review, it is moved to Location 3.
- Proposal coordinator picks up proposals from Location 3 and submits them.

With this scheme, every proposal must be approved by both reviewer A and reviewer B. If reviewer A fails to approve the proposal, then it remains in location 1. If reviewer B fails to approve the proposal, then it remains in location 2.

This is another one of those simple low-tech solutions: Instead of putting all proposals (complete and incomplete) in one location, the location of the proposal represents its approval state.

Of course, you can add more bells and whistles to this technique. For example, you can allow reviews in parallel by having Location 1 mean “unapproved”, Location 2a mean “approved by reviewer A only”, Location 2b mean “approved by reviewer B only”, and Location 3 mean “approved by both reviewers.” I’m sure you can come up with other tweaks. (I’m assuming that the proposal file format doesn’t support custom fields like “signed off by”.)



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