

A Proposal to Implement a Business Guidance Service (BGS) Manual Based on Business Process Management (BPM) Methodology: A Case Study in a Public Company in the Amazonas State

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A Proposal to Implement a Business Guidance Service (BGS) Manual Based on Business Process Management (BPM) Methodology: A Case Study in a Public Company in the Amazonas State

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The public company operates directly focused on providing services to clients operating in the Amazon trade sectors. This paper aims to present a previous study on the proposal to implement a Business Guidance Service Manual (BGS) in a public company in the State of Amazonas through the Business Process Management (BPM) methodology.

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1. Introduction

The continuous changes in the organizational and economic scenario require managers to have some decision-making power to try to follow the administrative process in this scenario. In this regard, there is a great need for adaptability of organizations to meet this demand, whether for competitiveness or for survival in the market.

Given this scenario, the client's figure is fundamental for a more accurate study on how to serve him and thus be able to meet his needs to ensure his satisfaction. An effective customer relationship requires a set

of aspects of the organization: flexibility, good communication, knowledge of the market profile and a good customer relationship.

This paper aims to present a previous study on the proposal to implement a Business Guidance Service Manual (BGS) in a public company in the State of Amazonas through the Business Process Management (BPM) methodology.

2. Theoretical References

2.1 Processes

The concept of process, in a broader sense, can be explained as transforming a system's input into an output. The concepts about the word “process” are defined by several authors according to their scope or area, such as: systemic, structural, semi-structural, administrative, organizational, among others.

Tiniila (1995) mentions that a process is the interconnection of logically organized elements for the operation of a certain task execution in an environment. It is then understood that a process works on an input - output - output logic. The process is based on the achievement of a certain result to achieve a goal or objective (MEGARD, 2002).

Maranhão and Macieira (2008) presents a theoretical framework of definitions by authors and institutions (Chart 1):

Table 1 - Process Definitions

AUTHORS AND INSTITUTIONS	DEFINITIONS
National Quality Foundation (2009)	Set of activities and operations that meet an objective or goal.
Association of Process Management Professionals (2012)	Chaining of actions synchronized or not that meet a certain demand for results.
From Sordi (2005)	These are subsequent stages or stages of evolution that suggest transformations.
Adesola and Baines (2005)	Input and output transformations for the elaboration of a service or product.

Source: Adapted from Maranhão and Macieira (2008)

In short, process definitions present it as a set of steps that are linked to a logical chain of steps to perform a given transformation, ie the process suggests that there is a transformation from a current state to a different state.

2.2 Business Process Management (BPM)

Business Process Management, or Bussiness ProcessManagement (BPM), is an organizational process-oriented enterprise management tool that aims to reduce lead time - to ensure greater efficiency and quality effectiveness. in the relationship with the customer (BRITTO, 2012).

BPM broke out in a scenario of market globalization with a strong inclination for consolidation mergers of

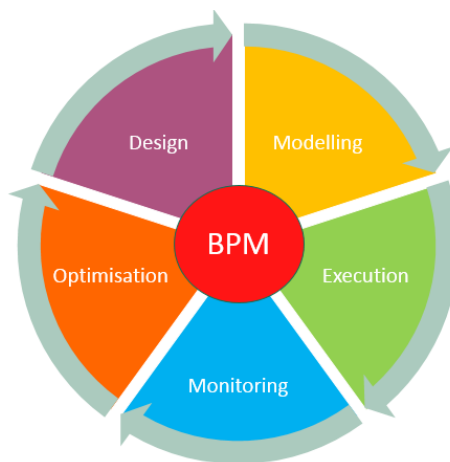
multinationals and large corporations, especially in the business sector. Brokeman and Rosemann (2013) state that business networks and the growth of outsourcing have boosted organizations' use of the BPM methodology to make the customer relationship more objective and clear.

The fusion of business management with technological apparatuses makes BPM a multifaceted process, as Santana (2015) approaches by analyzing that it deals with a management typology that focuses on process optimization impacting various areas of the organization, so that the results observed at all decision layers. Organizations are increasingly seeing that the business landscape offers the greatest competitive advantage when the market and customer are closer together. Simões (2006) states that market strategies in BPM are widespread through process management, ie reducing lead time means increasing production, feedback effectiveness and ensuring Business business goals.

The BPM Cycle (Figure 2) develops in four steps:

- Development and validation: process of preparing the model proposal for application;
- Execution: application of the model;
- Analysis and continuous improvement: model evaluation stage through performance analysis and improvement tools (quality tools);
- Design and modeling: process of model improvement through adaptability and adjustments to the organization's molds.

Figure 2 - BPM Cycle



Source: Adapted from Simões (2006)

Santos and Robaina (2014) argue that BPM involves strategies, objectives, goals, policies, implementation, development and governance tools for the organization. It is a tool that envisions the complete fulfillment of customer needs, so that there is a more systematic reach of demand responses through process flow management.

3. Methodology

The observational case study was based on an on-site analysis of the sector responsible for assisting the taxpayer companies in the process of collecting the compulsory tax collection from the public company.

The purpose of this step was to analyze the profile of the companies and evaluate their level of education about their knowledge about the benefits and advantages as contributors, thus being important to elaborate the BGS Manual.

4. Application of Study

This section presents the *modus operandi* defined for the structuring and elaboration of the BGS manual for the company. Given that this is an ongoing proposal, the data presented are the result of the first analyzes and evaluations of the BGS team based on studies conducted since 2016.

The proposal to implement a Business Guidance Service (BGS) Manual in the company started from a need observed in the last 10 years. The concern to disseminate to the trader the importance of contributing to the system has always been a major concern of the institution, given that its fundamental role is to ensure social welfare for employees and family members in the commercial area.

Based on this holistic analysis by the BGS, preliminary studies were conducted on the elaboration of a technical and administrative manual to explain, in detail, the whole process of compulsory collection, pertinent legislation supporting the institution and the company, as well as a clearer explanation of the advantages and benefits for the taxpayer.

4.1 Company Background

The public company operates directly focused on providing services to clients who work in the Amazon trade sectors. It is a private institution, maintained by private sector entrepreneurs in the areas of commerce, tourism, goods and services.

The company's activity is focused on the niche of supplying goods, services and products that serve members, whose advantages are offered in accordance with the collection policy through companies that are affiliated to the capitalization system.

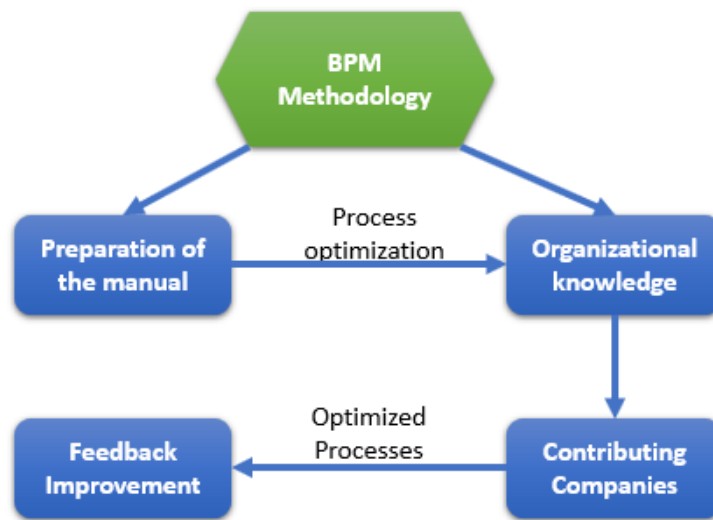
It operates throughout Brazil, and in Amazonas it serves more than 450 member companies through a collection policy. On the other hand, the company provides services aimed at the well-being and quality of life of the company's employees and entrepreneurs and investors.

4.2 Bpm Model Flow

In the midst of this initial technical study, a working tool was proposed to manage this process. Thus, BPM was chosen as the tool to be used in the process due to some characteristics, the main one being its integrated management and ease of propagation in the communication and information flow in the organization.

A previous model was designed to work the proposal (Figure 4):

Figure 4 - Proposed BPM Model



Source: Prepared by the author (2019)

The illustration above shows the chain of steps in the process flow thought from the proposal with BPM:

a) Organizational Knowledge

The process of organizational knowledge is the beginning of the methodological cycle of implementation of a BPM methodology. It corresponds to the knowledge phase of the company through the experiences, experiences, relationships and the organizational practice developed by its employees. For the elaboration of the proposal the relevance of the organizational knowledge was thought to realize a strategic mapping of the responsible of the company in intermediating the relationship between the institution and the contributing client-company. The development of this work team started from the choice of members who are directly interconnected with taxpayer service and who forged in a better business communication profile, which facilitates the relationship between the organization and the client.

b) Contributing companies:

This step in the BPM methodology concerns companies that have failed to contribute to the company and those that have not yet contributed for specific reasons. One of the main reasons detected in companies that do not contribute to the compulsory collection is the lack of knowledge about the process. This factor, observed by the BGS work team, can be verified by the still massive presence of small and medium companies that do not contribute to the collection because they do not know the advantages that their workers and the company itself gains from the system.

c) Feedback Improvement

Improved communication between the company and the taxpayer is defined as an optimized process in the BPM methodology. The absence of noise in this process allows the organization to get closer to its taxpayer, which leads to greater adhesion by the company's employees and openness to new partners. This stage of the process derives from the results that will be presented by the elaboration of the BGS Manual, which will bring more detailed and concise clarification to the taxpayers and new contributors of the company's association system.

d) BGS Manual

The methodological process based on BPM aims, at the end of its flow, to elaborate the BGS manual. This manual aims to present to the taxpayer all the advantages, benefits, legal protections and methods of adhering to the compulsory tax collection process. It will basically address the following aspects:

- General presentation of the “S” system;
- compulsory income;
- Brazilian Federal Revenue Authority - RFB;
- Forms of collection for third parties;
- Presentation on the process of transfer of compulsory revenues to the Entities;
- Tax Recovery Program (REFIS);
- Direct Collection;
- Improper collection to third parties;
- Refund proceedings under the SESC;
- Monitoring of compulsory revenues by SESC;
- Presentation of Basic Legislation.

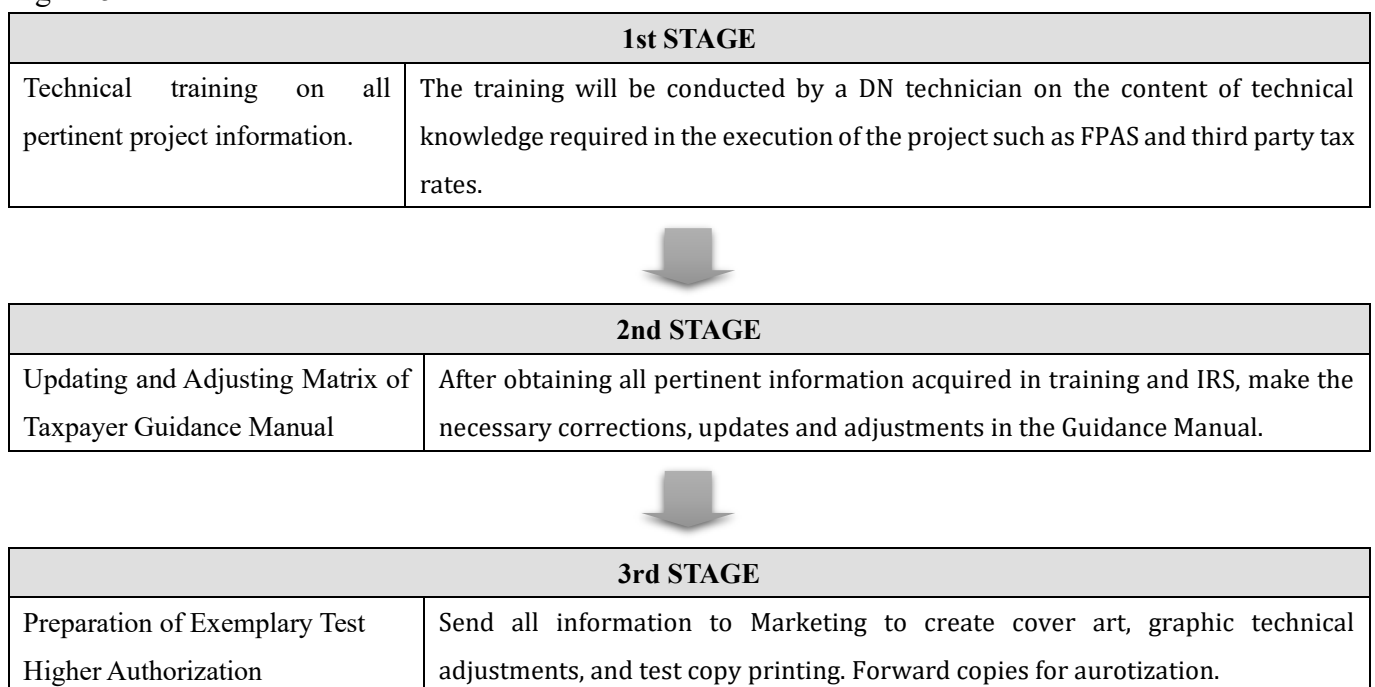
All this structure designed for the BGS manual will aim to make an overview of all the legal and administrative information of the compulsory tax collection process for companies, both for those who are already taxpayers, and to attract those who are not yet taxpayers. and want to participate in the system.

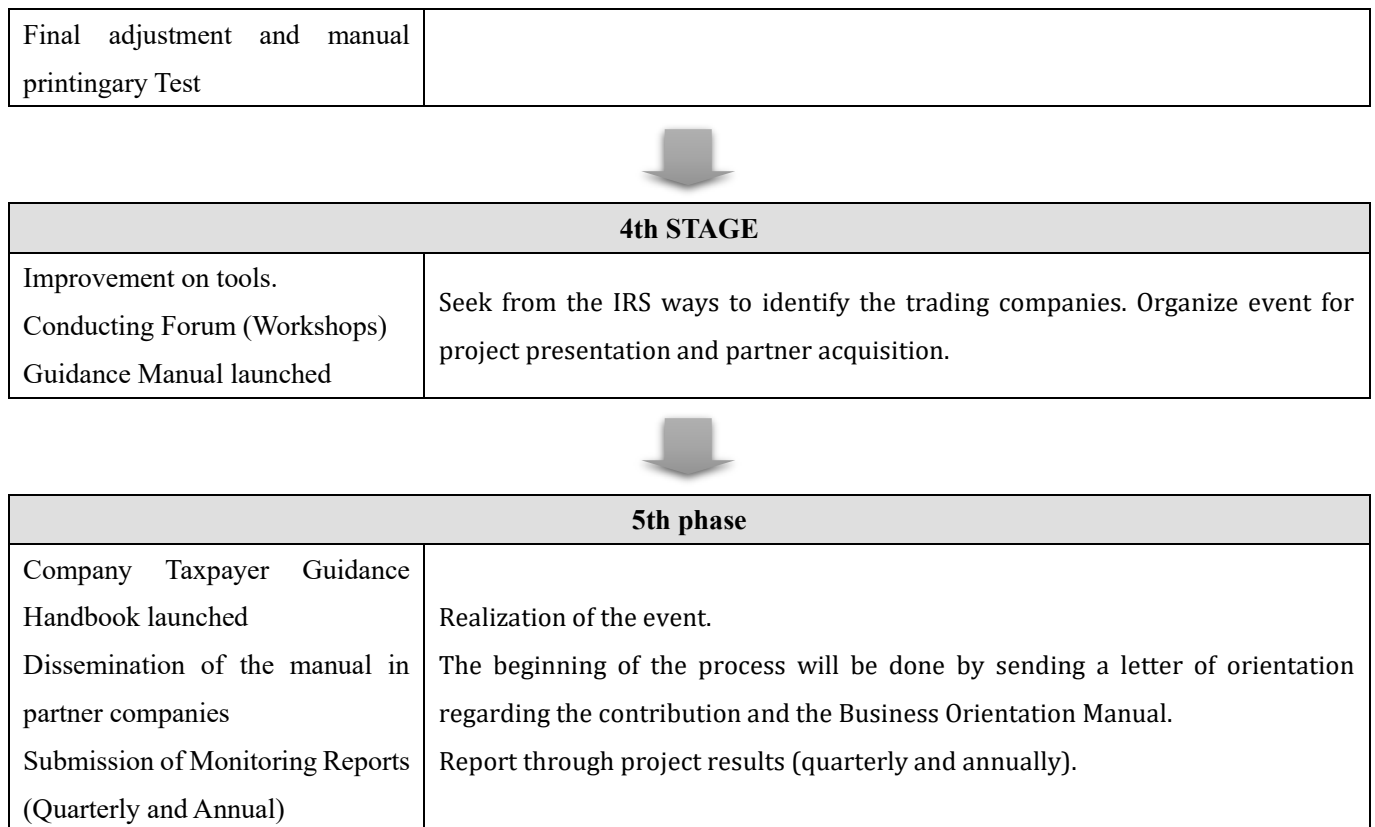
5. Results and Discussions

After the preliminary studies and initial preparation of the project roadmap, the BGS Handbook based on long-term application (2019-2021) was built according to the company's institutional policy.

The project guidance plan (BGS Manual) was prepared according to the following action plan guidelines (Figure 5):

Figure 5 - BGS Manual





Source: Prepared by the author (2019)

The results show that the institution has been using BPM as a tool to improve the relationship with its taxpayer, demonstrating a better effectiveness in the knowledge of the advantages and benefits offered by the company.

The planning of actions in the three-year period (2019-2021) from the elaboration of the BGS manual demonstrates that the company will be expanding the dissemination of its services and products to its customers and associates niche, in order to make them obtain them. greater knowledge about what is offered by the company.

It is observed that the action plan involves the entire training process of the servers, employees and outsourced workers that make up the company's structure, as well as the entire marketing and dissemination apparatus of the services that will be offered.

6. Final Considerations

The conclusion of the research allows us to analyze that BPM is a fundamental corporate tool to implement an improvement in relationship management in the organization, focusing in particular on the client (beneficiary) of the services and products offered by the institution.

It was observed that with the elaboration of the BGS Manual from the actions and guidelines based on BPM brought a systematic dynamization in the company's processes. The implementation of the model based on process management optimized the decision making process and allowed the company's information to serve customers by integrating the observed needs with the demand captured in the initial diagnostic process and, later, in the implementation of the manual.

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