Workflow and business information management in the language industry

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Abstract

LTC has almost a decade of experience in helping corporate clients and language companies implement business information and workflow control tools. Our experience has shown that many such operations focus on optimizing the linguistic side of their work, while rarely thinking to look at how they might get more out of their business and project management. As a result they often have cutting edge linguistic tools while using inefficient, fragmented systems for their business information management.

In the presentation we will try to redress the balance. One of our users, HCR - Informática e Traduções, Lda, a Portuguese LSP will join us to tell their story. HCR increased its productivity and saved time and money by centralizing crucial business data and controlling workflows using our software. Although we will use our software as an example of how software can help process optimization, the presentation will take a more general view.

We will look at company workflows and which steps are necessary to take a project from quote to invoice. We will look how this can differ enormously from company to company and think about pros and cons for various workflows. We will also discuss project optimisation and automation. We will see that different kinds of projects and different clients often require different workflows. We will compare workflows that are designed for different services and types of processes. We will also look at workflows that incorporate different sites in different countries and look at how time zones and national currencies and wages need to be taken into account for maximum efficiency and cost effectiveness.

1. Introduction

At LTC we know that every corporate language service department and every language service department (LSP) is unique. Unique because of a number of factors: the language combinations they offer, the services they offer in these languages, as well as their unique way of working - their internal workflow and the tools they use to support this work.

At LTC we know that this unique approach adopted by each company is vital. It allows corporate language service departments to operate internationally and to fit into their organization's structure optimally and gives an LSP its unique selling proposition.

After almost a decade of helping our users implement workflow control systems we have seen a large number of widely varying internal processes. Some grow organically; others are designed with specific goals in mind and each is unique to the organization it was designed for.

Most of these processes are still managed with fragmented systems consisting of a variety of databases, spreadsheets, templates, etc. or by homebuilt systems that tend to age quickly and often do not have the flexibility to adjust dynamically to changing circumstances. So although the approach may be what defines the company or, in the case of corporate language service departments, was created to fit into the structure of the company optimally, they are often not run as efficiently as they could be.

We will be joined by the Portuguese LSP HCR - Informática e Traduções, Ld - Informática e Traduções, Lda to show how much can be gained by optimising business processes and centralising business data.

2. Introducing our case study: HCR - Informática e Traduções, Lda

Although each corporate language service department and LSP is unique, there are problems and challenges in terms of business information and project management that many have in common. In the presentation we will look at a number of examples including both corporate language service departments and LSPs. However, HCR, a company that has used LTC software systems to optimise their processes for many years will join us as a case study to highlight how these challenges can be overcome.

HCR - Informática e Traduções, Lda, is a Portuguese Agency created in 1984, whose main business activity is Software localization and Technical Translations to other Agencies in Europe and USA and direct clients in Portugal, with a total of 600 active clients.

HCR have 15 in-house translators and localizers, 3 Project Managers, 2 administrative staff, 2 MCSE Engineers and work with 190 freelancers in the European market, chosen from a database of 1600 suppliers.

HCR's workload per day is as follows:

1.	N^o of projects per day	8
2.	N^o of invoices/NC/ND per day	5
3.	N^o of CV's received per day	2

3. The state of the business information management in the language industry: Fragmented systems, home-made solutions

Before HCR implemented LTC technology their back office system consisted of a variety of databases (MS Access) not integrated, complemented with MS Excel spreadsheets which were connected with some databases to maintain all the financial calculations, MS Project to have an idea who is doing what for which deadline, with some Word documents, full of macros, to communicate with suppliers and clients and MS Outlook email transport, all of that finishing in a invoice program developed in VBA.

1. Databases - there were 7 databases for Clients, Suppliers, Projects, Proposals, Translation Tools, Price Lists and Financial Documents (Invoices, Credit Notes, Debit Notes and Receipts). These databases were more or less communicating with each other, developed in Access at different times. Lack of consistency and overlaps gave us great problems in terms of engineering and management time spent not only to maintain and administer the databases but also in new developments needed for the daily work.

2. Spreadsheets - some of the reports, particularly the financial calculations were difficult in databases and HCR had to develop import/export macros to paste data from databases to spreadsheets and do the calculations to re-import the results into the databases. For instance Purchase Orders were made in spreadsheets, mainly because of the fuzzy calculations, and after that connected with the projects themselves, in a rough way.

3. MS Project - was used mainly to maintain a schedule of Projects, Suppliers, control of delays, all of that importing data from databases and spreadsheets using VBA.

4. Word documents - macros for sending QA documents to suppliers and clients, faxes and other documentation (CVS, etc) was also used in our back office, complemented with VBA developments.

5. MS Outlook - used as an email program not connected with the other applications where we attached any documents manually, because we didn't have time to develop these connections.

 Result:
- HCR didn't have time/resources for new developments (our core business is not that),
- The time spent on administrative tasks was stressful and costly, demanding new resources,
- The percentage of errors due to several data origins was amazing,
- HCR could not give information to clients, suppliers and management at due dates, and
- last but not the least, nobody was happy with the system...

This is a situation we see in many corporate language service departments and LSPs. Resources are wasted as fragmented systems take more time and are more prone to error, necessitating even more time be spent in revision. Furthermore, operations with such fragmented systems find it very hard to get a proper overview of their business activities.

4. The solution: Centralized business information strategies, pooling of resources and a holistic approach to workflow management

Review workflows

Keeping a close eye on processes and taking a little time regularly to examine them has many of benefits. Often, companies do not have to change a thing - reminding themselves of what they do, why, and how, can help them not only to see which parts of their processes can be optimized and where extra training will improve productivity very quickly, but they are also able to respond to change, growth, or new challenges more easily. There is a lot of technology out there that can help organisations, both on the linguistic and business management side. Being aware of their workflow means that they are able to make very quick decisions on which technology will benefit them

HCR used workflows suggested by LTC's systems and adapted them to their needs. New technology allows companies to keep their existing processes and optimise them. It even offers the possibility of adapting to changing circumstances. The key to being able to do this is to know your companies processes inside out. HCR will share how they went about analysing their processes and which changes they had to go through.

Centralise crucial business data

Fragmented systems such as that described by HCR above are very common in the language industry. Many linguistic tools now feature a certain amount of project management but miss the process, resource and finance management and reporting needed for good business management. HCR identified the data they needed to centralise and used LTC's systems to do so. We will look at other scenarios and discuss which further information can be centralised and which advantages these bring.

5. The outcome for HCR: Integration, centralisation

HCR chose to implement LTC business systems to optimize their business information management.

1. Databases - integrated, open, SQL databases, adapted to our business, easily changed and personalized, gave us increased consistency, easier maintenance, development, less stress and errors.

2. Spreadsheets -   Integrated reporting functions, PO and invoice creation made spreadsheets unnecessary.

3. Word documents - gone, with the extensive use of Crystal Reports, HCR maintain dozens of reports, forms, documentation, etc....

5. MS Outlook - even if used as an email transport, LTC allows to maintain all communications between suppliers and clients, with Supplier and Client Portals, that uses WEB access between the agency and their third parties involved, in a much easier way!

Result:

- No more complicated developments, only little adjustments and extensive use of Crystal Reports,
- The PM's now are responsible for the full workflow, from Proposal to Invoicing, from within an integrated environment, without duplicating data and spending considerable less time,
- Percentage of errors = 0 trend!
- all the information for all team members or project participants   is on line, updated and accessible via the Web.

6. Conclusion

HCR's experience is typical for an LSP or corporate language service department that chooses to use software systems to optimise their processes and centralise their business data. They usually experience :

significant increase in productivity for all players

decreased need for duplicate entry of data and the resulting errors

the possibility to use whichever linguistic tools are needed for each client or project while being

able to work in the same environment

quicker training of employees