Best Practices for Socializing Business Process Improvement Initiatives

Gina Abudi, MBA

Overview

Too often we jump into a business process improvement (BPI) initiative without taking the time to socialize the initiative throughout the organization. There may be a number of reasons for this, including:

- Lack of understanding about how to socialize such initiatives
- Lack of interest in socializing such initiatives
- Lack of understanding about the value and benefit of socialization
- False belief that socializing is not actually working on the initiative

However, experience shows that when BPI initiatives are socialized prior to the actual start of the project, there is an increased likelihood of success of the initiative and buy-in throughout the organization. Additionally, it enables the back end - the actual design and implementation of the initiative - to go much smoother. Socialization, while it does take a concerted effort to be successful, is far from an onerous process and one, which, when done consistently, reduces the effort involved over time as buy-in and commitment come much quicker.

This Article will discuss best practices for socializing business process improvement initiatives to ensure buy-in, support and increase the chances of a successful implementation.

Socializing Business Process Improvement Initiatives

Given the challenging nature of BPI projects, which include the potential that such projects have to impact the entire organization, the numerous tasks involved in the undertaking, along with the number of individuals involved throughout the organization, it is essential that the initiative be effectively socialized prior to the outset.

Let’s step back and define “socializing.” Socializing, as we are discussing it in this Article, is the art and process of getting individuals comfortable with the success of a particular initiative. It does not mean there will be an option not to move forward with the initiative if people aren’t happy about it, but it provides a way to increase the confidence level in an initiative that is going to happen. The goal of socializing is to get buy-in and commitment for the initiative. It is to convert those who are uncomfortable and uncertain about the project into champions who support the initiative and are proponents for it throughout the organization.

Socializing is essential for every project undertaken in the organization, but most especially for BPI initiatives given that such initiatives have a change management component. And change management initiatives often fail when they are not effectively socialized prior to implementation. The larger the initiative (the greater the impact within the organization and the more people impacted by what is going on), the more likely that you will want to set up a separate team to socialize what is happening and why. The first task I want this team to do is to develop a communication plan for socializing the initiative throughout the organization.
Developing a Communication Plan

You want to ensure consistency in the message you are delivering to all employees affected by the BPI initiative. You are going to want to communicate differently (but consistently) with individuals depending on a variety of factors, including:

- How much they will be affected by the BPI initiative
- How long they have been with the organization and in their particular role
- How many change initiatives they have been involved in within the organization and their acceptance of such initiatives
- The success of past BPI initiatives within the organization

Your communications plan does not need to be complex and should include the following information:

- Who
- What
- When
- How
- Format

For example, let’s assume we are changing processes around how we manage invoice clients. This will entail all new processes for those in finance who are tasked with invoicing clients. Our communication management plan - for the Finance Department in particular - may look like this:

<table>
<thead>
<tr>
<th>Communication Management Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Who</strong></td>
</tr>
<tr>
<td>Finance Department - all</td>
</tr>
<tr>
<td>Explain business process</td>
</tr>
<tr>
<td>improvement initiative</td>
</tr>
<tr>
<td>Mid-March</td>
</tr>
<tr>
<td>Via discussion, presentation</td>
</tr>
<tr>
<td>2 hour PowerPoint presentation and facilitated discussion</td>
</tr>
<tr>
<td>Finance Department - Accounting Assistants</td>
</tr>
<tr>
<td>Understand current processes in use within group</td>
</tr>
<tr>
<td>Weekly beginning on April 1 and through the end of the month</td>
</tr>
<tr>
<td>Via small group meetings</td>
</tr>
<tr>
<td>Face-to-face meeting: 1/2 hour focused discussions/data gathering at weekly department meeting</td>
</tr>
<tr>
<td>Finance Department - Accounting Assistants</td>
</tr>
<tr>
<td>Observe current workflow</td>
</tr>
<tr>
<td>Weekly beginning on April 15 and continuing for 2 weeks</td>
</tr>
<tr>
<td>Via observation</td>
</tr>
<tr>
<td>Observation of how job is currently done by “shadowing” accounting assistants throughout week</td>
</tr>
<tr>
<td>Finance Department - Senior Management</td>
</tr>
<tr>
<td>Report of progress in data gathering</td>
</tr>
<tr>
<td>Mid-March through mid-May</td>
</tr>
<tr>
<td>Via presentation</td>
</tr>
<tr>
<td>15 minute PowerPoint presentation to update senior management at bi-weekly Finance management meeting</td>
</tr>
</tbody>
</table>
The goal in communication planning is to be sure that there is a plan in place to communicate with everyone who needs to be communicated with but also provides for an effective forum to get information across and keep them engaged.

As a best practice, re-visit your communication plan on a regular basis to keep it updated. As the BPI initiative progresses, communications will need to change and be updated to reflect the progress of the initiative. You may have an initial communication plan focused on “selling” the initiative throughout the organization; however, as you gain buy-in and secure champions for the initiative, you will change your communication plan to be less of a “selling” effort and focus more on regular communication on progress.

**Use a Variety of Techniques to Socialize the Initiative**

In every business it is important to use a variety of techniques to socialize BPI initiatives. This technique helps in reaching the greatest number of people and providing individuals with a variety of avenues for reaching back to you. Not everyone will do well in contributing in small group meetings, and you may get more information from them if you focus on one-on-one communications. One of your primary goals is to engage them in conversation and keep them engaged throughout implementation. Other goals include:

- Determining who is “on board” and who is not (or, your champions and resisters)
- Getting commitment for the initiative and support to implement
- Keeping buy-in throughout the initiative

Use any of the following communication channels to socialize the initiative:

- One-on-one conversations
- Department/business unit meetings
- All staff or all hands meetings
- Lunch & learns
- After hours events
- Surveys
- Hallway (water cooler) conversations
- Small group meetings that include a variety of individuals (not simply from one department)
- Emails and other internal office communication channels such as newsletters, posters in the hallways, and intranet sites/portals
- Q&A sessions

Obviously some methods will work better than others in certain organizations. What is essential to remember is that you must use a variety of methods to be sure you reach the greatest number of individuals within the organization in a way that works for them.

I particularly like to keep my ears open at the water cooler and coffee machine. I often hear things about the initiative that I may not otherwise hear. I have no problem with “jumping in” to a conversation to provide accurate information, correct misinformation and otherwise contribute to keep the gossip at a minimum (or at least ensure accurate information is being conveyed).
Determine Who is on Board and Who is not

Identifying both your champions and resisters is essential to BPI project success. While your goal is to convert the resisters to champions, this is not always possible and rarely can you convert all resisters. That’s fine. Your primary goal should be to convert as many resisters as possible via multiple, strong communication channels and sharing of information and, for those you cannot convert, keep them engaged in the initiative.

Here is where many project managers/leads on BPI initiatives take a wrong turn - keeping champions as champions and keeping resisters engaged. Do not assume that because someone supports the initiative in the beginning that they will continue to do so. A number of events could occur that would change their “champion” status to “resister” status. In one example, a client was launching a BPI initiative and did an excellent job in the beginning in reaching out to others in the organization to get buy-in and support. Once the client had their list of “champions,” they focused all communications going forward on the resisters and neglected the champions. Long story short - a small change in the direction affected some of the champions, effectively moving them back to resister status and the project lead had no idea this had happened. When they launched the initiative, they were taken by surprise by a number of earlier champions who now were openly against it. Damage control was required.

To avoid this situation, keep champions as well as resisters engaged through sharing information and communicating regularly. Check in to see if they have any questions or concerns. Any small change can easily convert a “champion” to a “resister.”

Sometimes it is obvious who the resisters are—sometimes, not. By paying attention to hallway conversations, watching body language in meetings, and listening carefully when others’ speak - you’ll soon identify the resisters.

A Client Example

Let’s look at an example of socializing a BPI project for a client. The client is a public relations/marketing consulting firm. This project entailed changing processes in how the organization captured and utilized customer data. Given the extent of the process changes, we began socializing the initiative 15 days prior to starting the project.

We convinced the client this was the best approach because there were a number of individuals (mainly in marketing and sales) who were displeased with the idea of changing how they were currently working. This should not come as a shock. Most people when faced with change balk at it initially. Your challenge is getting them on board. If we hadn’t taken the time to get these individuals comfortable with what we were doing and why, we would have put the project at risk for failure.

Additionally (and a common issue unfortunately), the client (read: leadership team) was assuming that they knew how to change the process. And while they might be on the right track, the individuals making the decision were all executives - not those who were actually working under the current process. While the executives are certainly the final decision makers, it is essential to take into account how the work is actually being done. We started our initiative by meeting with the sales and marketing folks to provide them with our vision as to why we needed to change the processes, and to present the value and benefit of doing so as well. We emphasized that while we had ideas of how the processes might look, we had not yet settled on a solution (it was important that the executives did not come to the table with a solution already settled upon otherwise credibility is lost in the process of socializing the initiative), and our goal at this juncture was to get their input.
We asked the following questions during the meeting:

- What are your biggest challenges in capturing customer information?
- How do you develop relationships with customers based on the data captured?
- How do you currently utilize the data captured?
- What additional data would help you better perform your role?
- How would you (or do you currently) change how you now work in order to better support our customers?
- What other information would you like to share that would help us in this initiative?

During the 15 days, we used a variety of techniques to socialize the upcoming business process improvement project. We developed a communication plan to ensure effective communications during the socialization stage and updated it as we tried a variety of socialization channels. We identified those who were champions and recruited them to help us in our socialization efforts and spent more time with the resistors to get them on board.

At the end of the initiative of socializing the process, we had extensive buy-in and had new processes fairly well mapped out.

While for some companies the time spent in socializing appears to be a waste of time; it is essential to the success of the initiative. When you spend the time up front socializing and getting buy-in, you will find that the back end - the project implementation - goes much more smoothly than if you hadn’t invested the time.

**Summary**

Business process improvement (BPI) initiatives are very challenging projects in many organizations. The impact throughout the organization is usually great and, in addition, often requires “selling” of the changes throughout the business because you are impacting how individuals will be doing the work. Spending time upfront in socializing and getting buy-in actually decreases the amount of work on the back end.

Develop your communication plan for socializing the initiative and communicating throughout the project. And update it regularly since as the project progresses and you begin to convert resistors to champions - communication needs will change.

Remember to use a variety of channels and methods for socializing and communicating with the BPI project; you’ll reach and connect with the greatest number of people in this way.

**Author**

Gina Abudi, MBA, President of Abudi Consulting Group, LLC has 20+ years’ experience in project and process management and management/leadership strategy, including strategic learning and development programs, and business impact and ROI. She is co-author of *The Complete Idiot's Guide to Best Practices for Small Business* (Alpha Books, 2011) and contributing author to Gantthead’s *Project Pain Reliever* (J. Ross Publishing, 2011). Gina is President of the PMI® Massachusetts Bay Chapter Board of Directors and an active member of The Boston Club. She can be reached via her website: [http://www.AbudiConsulting.com](http://www.AbudiConsulting.com).

**BPTrends Linkedin Discussion Group**

We created a BPTrends Discussion Group on Linkedin to allow our members, readers and friends to freely exchange ideas on a wide variety of BPM related topics. We encourage you to initiate a new discussion on this publication, or on other BPM related topics of interest to you, or to contribute to existing discussions. Go to Linkedin and join the [BPTrends Discussion Group](http://www.bptrends.com).