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“Chunking” as a Tool for Effective Communication and Change

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Sometimes as BPM or Process professionals we get so hung up on maps and models etc, that we forget that there are other tools and techniques we need to leverage. For this month's Article I thought it might be useful to introduce a technique labelled "Chunking". I suggest that given that most process teams are trying to effect change, and that communication around change is always challenging, then anything that might help could be worth sharing. It is a technique that I learned many years ago, has served me well, and has always proved popular when I teach it in my training classes.

The principle of "Chunking" is said to have first been put forward in the 1950s by George A. Miller, a Harvard psychologist. Most people today will be familiar with the theory he put forward "The Magical Number Seven", Plus or Minus Two". The original research was related to our short term memory, how many numbers we can remember a few minutes after being told them only once. However, his work has gone on to be applied far beyond numbers. The principle of seven plus or minus two, is now well established as a "Golden Rule" for presenting, selling or communicating information to people. We know that we should try to follow the principle on slide bullet points, written communication and oral presentations, but "Chunking" has other applications that are vital for effective business and process improvement projects.

Beyond traditional means of communication it can be, and has been, successfully applied to the creation of maps and models e.g. no more than nine activities/ processes/ objects in a single map/model. If we have more than nine then we should break them down into manageable "chunks". The application of chunking to our maps and models aids comprehension and ensures readability.

"Chunking" is also used in a completely different way in Neuro-Linguistic Programming (NLP). It is this alternative use of Chunking that is extreme value in our process improvement or BPM type projects. I am starting with the assumption that many people struggle to either get buy in for change or to have the proper level of detail required in order to be able to implement a solution. In my own experience this has certainly appeared as the conundrum on many projects. Well perhaps you might find the answers you are seeking in the NLP concept of chunking.

In NLP "Chunking Up" refers to our moving to more general or abstract information, while "Chunking Down" means moving to more specific or detailed information. Whilst this may be similar to the point discussed above regarding maps and models, it is in fact quite different. The focus on the techniques in this case is on how we reach agreement with people or how we can elicit greater levels of specificity from people.

Learning the technique and practicing thinking about it will greatly enhance your ability negotiate more easily, to find common areas in order to reach agreement, generate new ideas and to identify the details that matter.

In order for us to chunk up on a particular piece of information we could use questions such as the following;

- For what purpose?
- What is the intention?
- What is this a part of?
- What is this an example of?

As an example, let us use sport and I assume that you are an avid fan of soccer, while I, for my sins, think cricket is the best sport. We could spend hours debating and arguing the relative merits, without ever being able to reach any form of agreement, or we could use the technique of chunking to quickly and easily reach agreement. So the example questions might now be:

- What are soccer and cricket both examples of? – Team sports?
- What is the intention of a soccer or cricket match? – To win?
- What is the purpose of a soccer or cricket match? – To entertain?

Thus, we might quickly establish that we both agree that team sports are good, we might agree that we find them entertaining and that we enjoy our team winning. We can apply the same principle to methods and approaches to process improvement. All over the world people are still arguing or debating Lean vs. Six Sigma vs. BPM, vs TQM etc. What, though, might happen if we asked everyone to apply the following questions to their preferred approach or technique?

- What is the purpose of (Lean, Six Sigma, BPM etc.)? – To improve a company's performance
- What is the intention of (Lean, Six Sigma, BPM etc.)? – To deliver performance improvement through the optimization of processes
- What are (Lean, Six Sigma, BPM etc.) examples of? – Structured approaches for identifying and removing waste

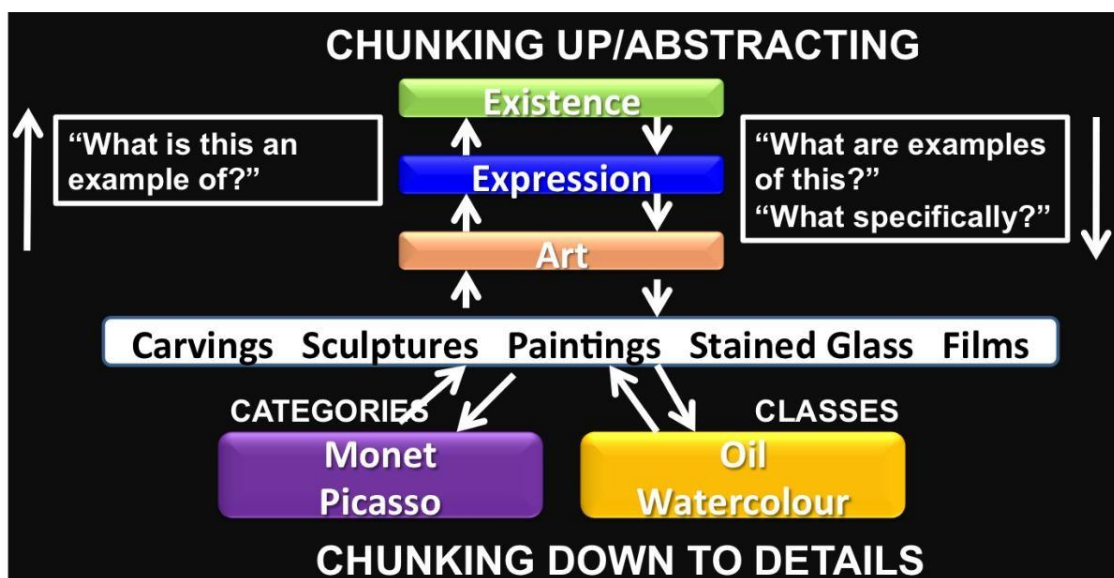


Figure 1 - Illustration of "Chunking"

You may have other answers but hopefully you will agree that when we chunk up like this we can see that the essence of all the approaches is the same. In my examples we have reached similarity on one step, but for more complex examples it may be necessary to chunk up to or more levels in order to reach the level of agreement. The principle of chunking up allows us to focus on the "forest" rather than be stuck with the "trees".

At other times we are in need of additional information or detail so we can use the technique of chunking down, examples of questions that can assist in this would be;

- (How, what or who) specifically?
- What is an example of this?
- (How or what) is a good way of doing that?
- When would we use/do that?

Going back to our sports example let's assume that I do not want to debate your love of soccer, instead I want to understand more about it, then I might ask the following example questions;

- What specifically do you like about soccer? – Playing it
- What is a good way of doing it? – Joining a team
- What is an example of this? – I play for the company team

If we chunked up as above we could reach agreement, but we might still be missing vital facts, in this case by chunking down we can increase our understanding. Of course we could then chunk back up from here based on playing, teams and the company and it is possible we would reach an even stronger agreement. Even if agreement was not the purpose we would still now have more useful information.

With our examples around methods and tools for process improvement we might inquire;

- What specifically is it you like about (Lean, Six Sigma, BPM etc.)? – A structured approach to change
- What is an example of this? – the way we restructured our complaints process
- How specifically? – we provided knowledge to enable one touch resolution

Here we can see that rather than talking about a method (abstract) we moved down into what it is used for and then drilled down to an example of how it had been used and what we specifically used it for. So now we can talk about the benefits of the approach, rather than simply selling the approach itself.

The examples presented here are kept simple to aid clarity, but chunking is also invaluable in getting us to think laterally. Lateral thinking is often taught and used as a way of getting us away from problems and into solutions. To effectively use chunking in this scenario one simply chunks up one or two levels and then chunks down again. As an example suppose you have to take a package to a particular destination and you do not wish to use your car. To identify alternatives, first chunk up, i.e. what is driving your car an example of? One possible chunk up is a mode of transportation. Now chunking down, you can easily identify many different modes of transportation which are on the same logical level as car i.e., Motorbike, train, airplane, walking, etc. And you can select the mode that meets your other needs.

The principle of chunking is widely used in negotiation and mediation to great effect, which is also the objective of many of our change efforts, and so is extremely useful to process and performance related projects.

Additionally in NLP teaching we make use of two models which help with and can facilitate better Chunking. They are the Milton Model – which uses vague or abstract language – to help us in chunking up and the Meta Model – with a number of different language constructs – which help us in obtaining specifics and thus helps in chunking down.

To summarize “Chunking” can be thought of as organizing or breaking down some experience into bigger or smaller pieces. Chunking up involves moving to a larger, more abstract level of information. Chunking down involves moving to a more specific and concrete level of information. Chunking laterally involves finding other examples at the same level of information. It can be used to reach agreement, obtain additional and accurate detail, to move people from one plane of thinking to another and many other useful ways. I consider it as an important skill in effective process analysis, design, improvement and change.

Author

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A former Research Director at leading IT industry analysis firm Gartner, Mark has an extensive background in enterprise architecture, business process management and change management, having held executive positions with a number of technology companies. Since retiring from Gartner he now works as an independent consultant with clients such as Changepoint, Erwin, Mega, Planview and Signavio

Mark has authored or co-authored four books on business and process management, including “Thrive! How to Succeed in the Age of the Customer” and “In Search of BPM Excellence” and “People Centric Process Management. Widely respected for his knowledge and views on business change, he is the creator of “Next Practice” and has variously been described as a “BPM Guru”, a “Thought Leader” and a “Master of Mindset”

Mark is passionate about the people aspects of change, he has spent much of the last fifteen years travelling the world, learning, teaching and researching the cultural aspects of change and how executives perceive business and process improvement. In this capacity he has literally taught hundreds of people and been fortunate to interview and interact with many CEO’s

Mark holds certifications in Six Sigma, PRINCE2, Sales, Neuro-Linguistic Programming and Hypnosis! Mark suggests that it is the variety of his studies, which provide the depth he offers to his clients, in his words “It is the difference that makes the difference”

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