

Capturing Reality: Getting Everyone on Board

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A previous paper outlined the elements involved in setting up a process improvement project. With a project well-defined and management support secured, it is time to spread the word. We want to ensure that everyone involved in the process to be studied is aware of what is going on. We do that with a public announcement.

Setting the Stage

There aren't many things you can do at the office that will make an employee more uncomfortable than having someone they don't know looking over their shoulder and taking notes. We should do everything we can to allay their concerns before we even get started. Data collection should be preceded with a public announcement by a respected, high-level executive. An announcement by the executive whose span of control covers the process is ideal. This is the person who can ultimately make decisions about any part of the process. Enthusiastic support from this person will encourage cooperation from the people who do the work and discourage political posturing by managers who control portions of the process.

A short, face to face announcement meeting is the most powerful way to get the message out. The purpose of this announcement is to inform the people who are involved in the process about the project and ask for their support. The executive will explain the objectives of the project and introduce the person who will collect the facts. The people will be asked to make time to support the project. They will be given an opportunity to ask questions and they will be assured that there will be no loss of employment as a result of this process improvement effort.

Explain the Objectives. The objectives were determined when the project was set up. During the announcement, everyone hears first-hand what the executive expects to achieve with the project.

Introduce the Analyst. The executive introduces the analyst and describes the fact gathering approach – the analyst will be walking through the process, following the documents (paper and electronic, forms, email, spreadsheets, databases...) and interviewing the people who work with these documents. The interviews will focus on the process, not the people.

Identify the people who will be involved. The people selected to be directly involved with the project are identified. These are the folks with the most experience with the work that is being studied. Other people who do the work are encouraged to speak with the Team Members with any ideas or concerns they have.

Ask for Support. Everyone is asked to make time for the analyst, typically a couple of hours at the most. The tone here should convey the importance of the project.

Answer Questions. There is one particular question that is likely to be asked, particularly when reducing processing time is an objective of the project. If it is not answered appropriately, the project will be in trouble. It would be wise for the analyst to discuss this with the executive before the announcement.

The question is: "Will anyone lose their job as a result of this project?"

Imagine, for a moment, that you are sitting in that audience and the executive's response is "We'll do our best to see that nobody loses their job." What do you think of that answer?

The appropriate answer is: "No. There will be no loss of employment as a result of your improvement work," with perhaps further clarification such as "unnecessary *work* will be eliminated. If you can eliminate the work you do, then we will find productive work for you to do." The executive may speak about the organization's growth or about new ventures the organization has planned.

With the stage set, we are now prepared to collect the facts. More on that next time.

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