

Improve Processes With Internal Talent and a Solid Plan

You don't need an outside consultant or a lot of time to fix broken systems.

BY ROSEMARY A. OKOITI

Making organizational change is often more complicated than it sounds. Frequently, the change requires alterations to several processes, functions, and systems that seemingly are outside the department or area where the changes are occurring. One seemingly solitary change can affect many departments.

Therefore, one of the first steps in modifying an organization's process is to make sure that changes do not have an adverse consequence on other systems. That requires an additional layer of safeguards. At one of the companies I worked for, the talent development function was responsible for managing change, which involved many activities, including ensuring that employees followed proper procedures.

What I quickly realized was that as the talent development function tried to implement change, there were several other changes also taking place—and they lacked proper documentation. Company policy mandated that before a change is implemented, the change manager must inform other departments that may be affected and receive sign-off. That notification and sign-off often was not happening, which made it difficult to track changes and move forward according to proper procedure.

Many of the employees and even managers who were handling the changes had limited knowledge of what they needed to do to appropriately follow policy and standard procedure. As a result, many changes were simultaneously taking place in the company with scanty documentation, which caused change projects to take too long to close. Staff were wasting a great deal of time going back and forth discussing what needed to be done and how.

Additionally, employees were frustrated because they were not sure what the company expected of them and because the system for altering a product or process was not working efficiently. Given the organization's requirement that products be released for shipment only after change managers completed all related documentation and management provided approval, the company experienced product release delays and financial losses.

I joined forces with a colleague from the regulatory team to discuss and address the challenge and its repercussions on the business. We decided that the best solution would be to revamp the whole change process. First, we formed what we called the extended team, a cross-functional group of staff from regulatory, quality (training), operations, engineering, and production. The extended team comprised 12 members whose mandate was to identify via brainstorming sessions the root causes of the change process challenges.

The team determined that the root causes were an unclear, inefficient change process system and employees who did not receive training on how to handle the changes.

Resources Used

Cross-functional teams benefited from the expertise of colleagues and their swath of perspectives and insights. The teams also contributed to gaining buy-in from across departments.

Time Saved

Involving users in the process enabled the team to learn firsthand the change process's challenges.

Benefits

A plan broken into three parts gave the team some early, easy wins, creating momentum to continue moving forward. It also allowed for urgent changes to be made.

It classified solutions into three categories:

- Short-term solutions were the low-hanging fruit that the team could solve within one week.
- Medium-term solutions needed one to two months to implement.
- Long-term solutions needed more than two months to implement. Ideally, those solutions required management approval and employees to be trained prior to their implementation to ensure staff would follow the processes correctly.

A core team of five people from among the extended team worked on the project through to completion, calling in other members of the organization as needed on a given process. The following measures detail the change process core team members followed.

Short term:

- introduced weekly meetings between the change owners and management during which change owners could

SOLUTION

When making organizational changes, have a clear process in place and ensure that all people who are involved understand and can use the process efficiently.

- discuss issues that needed to be addressed for their change projects, seek clarifications, and get approval to implement the changes or have the changes signed off on for closure
- worked with the owners of new urgent change projects, coaching them on what they needed to do under the current system so they adhered to protocol
- had nonurgent changes put on hold until after employees received training to ensure that they knew how to perform the change process correctly.

Medium term:

- redesigned the change process with clear step-by-step guidelines from start to finish, including examples that provided further guidance for employees and managers
- re-created supporting forms, removing ambiguous terms and retaining only the necessary information
- presented the draft procedures and forms to the

- extended team, change owners, and management for their input and approval
- designed two training programs—one for the change owners and one for change assessors.

Long term:

- trained the change owners and the change assessors
- conducted a mock change process with all change owners and assessors
- executed coaching sessions and consultations to ensure that the trainees understood what they needed to do, when, and why when implementing the change process
- instructed the trained owners to implement the nonurgent changes and monitored the process, which ensured that the new process worked as envisioned
- asked the change assessors to complete their assessment
- conducted an effectiveness verification to ensure that employees had followed the process as spelled out.

Leveraging subject matter experts from different departments helped make the organizational change process more user-friendly, more efficient, and less time consuming, which ended up saving the company more than 30 hours each week of staff time—an ongoing time savings.

At the end of the change exercise, the organization noted several visible positive results. Most notably, workflow improved even though there were fewer employees. During the change process improvement, the company lost two employees who were active change owners. Despite fewer workers, implementation of the

new process moved onward with a smooth workflow.

Change owners and assessors now knew when to initiate changes, how to carry out the process, and why they had to follow it. Everyone was on the same wavelength because they had clear instructions and adequate training. In addition, because many employees were part of the change process, there was already buy-in on the process design.

Employees no longer wasted time asking about what should be done. There was never disagreement between employees or managers in different departments about what needed to move the process forward; the next steps were clear.

RESULTS



The new, clear process saves the company more than 30 hours per week in staff time.

Finally, all relevant documents became easily accessible on a shared drive. Everyone who needed to use documents and other necessary information for the new process knew exactly where to find the materials.

Because of the new implementation, the company experienced no more delays in product releases. That saved time as well as money, because customers were getting their orders on time.

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