

### PROCESSES AND PROCEDURES: WHERE RUBBER MEETS ROAD

Wait! Don't hit that delete key quite yet. When most managers think about how outdated their processes and procedures are they want to do just that...hit the delete key and hope the problem goes away by itself. Besides, regardless of what the documented processes and procedures look like, your teams are getting their work done, right? Handoffs are smooth, nobody drops the ball, there are no delays, and customers are happy. Or are they? Effective processes and procedures can be where you make sure that work gets done in a reliable, consistent, repeatable, measurable, and efficient way; where the rubber meets the road.

### PROCESS DEVELOPMENT MODEL

Six stages define a comprehensive model for effectively developing and deploying processes within your organization. Here are the six stages and their definitions:

1. Policy  
*Ensuring approved policies in support of the new/improved processes are in place. Outlining the process development approach and plan, including communication and training plans.*
2. Process  
*Validating functional roles and process steps. Documenting, refining, and finalizing process flow diagrams. Drafting rollout communication and training materials.*
3. Procedure  
*Documenting, refining, and finalizing procedural documents in support of process flow diagrams. Finalizing rollout communication and training materials.*
4. Training  
*Delivering rollout training.*
5. Communication  
*Conducting rollout communications and events.*
6. Deployment  
*Putting the new/improved processes and procedures into action.*



## POLICY

The best place to start is with an in-place, approved policy that enables the process. At this stage, the approach and master work plan are developed to define the effort. Detailed communication and training plans are also prepared. The communication plan should include a stakeholders expectations analysis as well as a communications vehicle review. The training plan includes steps to develop training materials and prepare for all logistics. Train-the-trainer steps are included in the plan where required. The Policy stage lays the foundation for future stages in the model.

## PROCESS

At this stage, the roles and steps required to complete the process are defined and documented. Handoffs with other processes are also documented at this stage. Spend the right amount of time getting this stage right, clearly documenting the process with a flow diagram and fully understanding how the work actually needs to get done. Getting the steps, roles, handoffs, and deliverables right will ensure the process provides expected results. Rollout training and communication materials are also drafted at this stage.

## PROCEDURE

Developing procedures that clearly describe the specific steps and deliverables within the process will enable that process to be consistently and reliably executed. The procedures document serves as the companion to the process flow diagram created during the Process stage. At the Procedure stage, you finalize the training and communications materials, as well.

## TRAINING

This phase of the model starts by ensuring all training logistics are in place, including training rooms scheduled, trainees scheduled, and other needed arrangements. Pilot training sessions are utilized to test and refine training materials. Based on the results of the pilot training sessions, the training materials are refined and then delivered to all those needing to deploy the new processes and procedures.

## COMMUNICATION

With training completed, communications materials can be delivered and rollout events can be conducted. Key to this phase is the opportunity to gather and distribute frequently asked questions so that audiences are thoroughly prepared to deploy the new processes and procedures.

## DEPLOYMENT

This final stage is the most straight-forward. The final process and procedure documents are signed off and put into operation.

## KEY SUCCESS FACTORS

How do you make sure that work gets done in a reliable, consistent, repeatable, measurable, and efficient way? When you develop processes and procedures, keep these keys to success in mind:

- Strong sponsorship for process development work
- Thorough, advance planning
- Clearly defined roles and responsibilities
- Sufficient staff, time, and dollars budgets.

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