

How to build a compelling case for process improvement

Your 9-step guide to getting buy-in from the people who matter





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Ongoing business process improvement efforts are critical to the long term success and, in fact, the survival of many organizations.

When managed well, process improvement programs can fuel efficiency, engagement, profitability, innovation and growth. But how do you make sure you gain the necessary buy-in to kick start your process improvement efforts, and then make sure they're sustained - not just a flash in the pan?

When you make continuous business process improvement part of your DNA, not just a one-off project, your staff, customers and the bottom line of your business all benefit. But according to global process improvement thought leader [Craig Reid](#), that's easier said than done.

One of the hardest parts of bringing business process improvement to life is building a compelling case to get the initiative up and running in the first place. To make the changes successful, it takes a structured approach to get staff at all levels of your organization involved and motivated.



In a recent webinar, Craig Reid shared his 9-step guide to building a compelling case for process improvement.

[Watch the webinar now](#)



Show the value

Link Business Process Improvement to business strategy

No surprises here – for your business process improvement initiative to be successful, you need to start by getting the senior executive team onboard.

The easiest way to do this is to demonstrate how process improvement will help them achieve their overall vision, or strategy. If you can show how the process improvement efforts help execute the organization's overarching strategy (and they almost certainly will), that's a sure fire way for it to get noticed - and supported.

As you go through your initiatives, link each of the processes you're looking to improve back to how it will add value from a strategic point of view.

It's also powerful to show a bit of methodology – use a structure that shows how you connect up the technology, services, and strategy with the customer, and how you will actually deliver upon that with business process management.



Understand the organizational landscape

Identify the burning platforms

Your goal should be to identify and understand the critical organizational issues and process problems, so you can tackle them in your change management plan.

This will enable you to really sell your process improvement initiatives by showing exactly what you'll be solving and by tapping into the things that really need to change. You can get a better understanding of your organization's landscape and burning platforms in a number of ways:

1. Conduct interviews for a top-down & bottom-up approach

Talk to as many people as you can, conduct interviews and find out what their burning issues are. A good question to ask is "What's keeping you awake at night?" Make sure you talk to people at multiple levels within your organization so you can uncover any disconnect between those doing the day-to-day work and the executive team.

2. Listen to your customers

If you have a contact centre, listen in to some calls to get a better feel for your customers' issues. A summary of the top ten customer complaints is also a great way to pinpoint some of the problem processes.

3. Identify the level of process maturity

Identify the level of process maturity to provide a snapshot of where the organization currently sits, and a benchmark by which to measure future progress. This is popular at the executive level because it gives them a target and helps you build a roadmap to get there.

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Recruit the influencers

Just getting sign-off on your project won't be enough – you also need to get buy-in, so people are truly motivated to participate and make it work. And that starts with the influencers.

For executives, it's all about short, sharp sessions to explain your methodology. Then seek out the process champions in each department or team – they should be 'process pirates', creative 'doers' who are going to challenge the status quo and identify better ways to do things.

Once you start getting proper buy-in from these two groups, you'll see the change start to ripple throughout your organization.

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Define and communicate key messages

When it comes to the definition and communication of key messages, channel [Simon Sinek](#) and focus not on what you're doing, but why.

Capture short, sharp messages that give examples of how process improvement will make things better.

Try to find something new to mention – things like reducing costs or improving customer experience are often overused, and are sometimes not specific enough to grab attention.

Always be honest and realistic. It's all about incremental transformation - taking one step at a time.

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Sustain communication

To get staff onboard with your process improvement efforts, you'll need to market your change initiative to them the same way you would market to your customers. Here are some tips.

1. Elect a change manager responsible for overseeing your communications planning and implementation.
2. Use a range of methods like email, intranet, events, teleconferences and video.
3. Keep reminding people what you are doing with short, regular messages.
4. Make people feel special.
5. Mix in some fun to make it memorable.
6. Tailor your message to your audience – what suits your executives won't suit your on-the-ground team.
7. Plan communications to avoid clashing with other important messages – you don't want to get lost.
8. Tell a story.

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Find a 'process nugget' and focus on the benefits

This is all about getting a win on the board, so people immediately see benefit.

Go back to your process maturity survey for clues – look for processes with high levels of inefficiency, negatively impacting customer experience or in high risk areas. Bonus points if you choose an executive-level problem – this will likely help you win some much needed backing and resources.

Process improvement can be a little bit misunderstood so focus on benefits like:

- Greater efficiency, consistency and profitability
- Higher levels of customer satisfaction, loyalty and recommendations
- Clearer internal visibility and strengthened compliance
- Increased agility and improved market competitiveness
- Stronger staff engagement and retention

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Quantify the benefits of the future state

Everyone wants their customers to be happy but the executive team will need to see more than the promise of happier customers – most will want to see tangible benefits quantified too.

You can quantify benefits by comparing the current state processes to the future state – map it out and put timings against it. This will enable you to identify tasks that have been eliminated or improved (you should also show these as a number or percentage) and the resulting cost savings (show the dollars!) and customer experience benefits.

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Make change part of your DNA

This may seem obvious, but remember that in order to gain continued buy-in to your process improvement efforts, you'll need to continue to deliver and demonstrate value on an ongoing basis.

So how do you keep it going? Business process improvement is not a quick-hit, fad diet – it's about making change a continuous and critical part of your organization's DNA.

Implement regular reviews to track and report on your progress, identify new areas of opportunity and maintain momentum.

Business process improvement should also become an integrated part of your day to day operational processes and reviews. Rather than being viewed as an extra, unnecessary thing to do, process improvement needs to become a normal part of your project methodology and PMO.



Celebrate your success

Celebrating successes – and progress - is critical to maintain process improvement momentum.

1. Use physical and digital progress boards to display running totals of savings and customer experience improvements.
2. Conduct an annual survey to show your maturity progress.
3. Break big initiatives into smaller chunks – that means more milestones, and more wins to celebrate.

Make it easy on yourself

To get your process improvement effort off on the right foot and ensure it's a success, you'll need to build a solid case and get the organization bought in and involved. You can't do it alone.

While the hardest part is getting started, the good news is that it will get easier once you've started to demonstrate benefits for customers, staff and executives, and got some wins on the board.

Good luck and give us a [shout](#) if you'd like some help building your case for process improvement or to see examples of how other organizations have successfully made their case.

You can view the full webinar presentation [here](#).

About the Presenter

Craig Reid, CEO, The Process Improvement Group

Craig is an international keynote speaker and consultant specialising in Business Process and Customer Experience Improvement. Craig has also become globally recognized as a Business Process thought leader through his blog, 'The Process Ninja' and has been named several times as one of the top process bloggers in the world. He recently published his book: The Process Revolution: Transforming your organization with business process improvement. Get your free copy of the e-book [here](#).

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