Hello, I'm Himanshu Malhotra, the Principal and Practice Lead for Digital Transformation here at Leanopsys.

Today, we're focusing on a topic that's important for any organization aiming for agility and effectiveness: the *seamless introduction of new processes*.

New Process Introduction

In my extensive work in digital transformation, I've found that the introduction of a new process is rarely simple. Organizations frequently encounter a range of technical and cultural challenges that can impede even the best-laid plans.

Process	Culture
• Process Design • Vendor Management • Implementation • Process Change Documentation	• Stakeholder approvals • Communication & Training

Let's examine some of these typical challenges:

1. One hurdle is designing a process that fits seamlessly into an existing operational environment. This involves not just technical considerations but also compliance with industry standards and regulations.
2. Another hurdle is vendor management, including selecting the right vendors, negotiating contracts, and ensuring that they deliver on time and within budget.
3. Implementation brings its own set of challenges. Transitioning the new process effectively involves not just technical deployment, but also aligning it with existing workflows.
4. Documenting process changes is vital for compliance and for future reference. This often gets overlooked, but it is crucial for the process to be sustainable and enduring.
5. Identifying stakeholders and getting their support — as well as approval from gatekeepers — clears the way for a new process to be accepted and integrated into the existing system.
6. Effective communication is key, especially during the pilot phase when it comes to training employees and troubleshooting the new process.

Let's look at a recent new process introduction from one of our international clients.

They were piloting a newly required employee-compliance process, when they determined it wasn't performing and would have to be completely reimagined. So, the process objectives were clearly defined and understood; Still, they were struggling to conceptualize a new approach that would be tamper-proof and legally compliant on one hand, and friendly to the organizational culture on the other.

Some Complexities

The operating environment presented additional difficulties. First, the client operates in a highly-secured environment. This extends from their physical operations to their technological systems and displays. Any new process – as well as the steps to deploy and maintain it – had to align with stringent security protocols.

Second, the process in question depended on accessing sensitive third-party data. This added another layer of complexity, as it required attention to legal and data security compliance.

To put our activity on a path toward a successful process adoption and enduring long-term success, we relied on a consistent framework, starting with Workshopping the Process

Step one: Workshop the Process
We organized a small requirements-workshop, where we and the client discussed:
1. Reasons for implementing the new process,
2. Process outputs,
3. Implementation timelines, and
4. Budgetary constraints.

The workshop outcomes re-emphasized the significant practical constraints of the security environment, but they also allowed us to capture detailed business requirements, client expectations, and opportunities for exploration.

Step two: Identify and Engage Stakeholders
Critically, we were also able to identify and document the various stakeholders for the implementation, and those gatekeepers we would depend on to approve the process design, implementation, and any revisions based on stakeholder feedback.

This allowed Leanopsys to move on to Developing the Process Options

Step three: Develop the Process Options
Based on our informed assessment of the client's specific needs and constraints, we proposed a blended operating model that combined in-house and external technology components.

We also recommended a suitable digital technology partner from our extensive network of industry partners — one experienced in the technical domain, capable of engaging swiftly and adhering to the information security requirements.

As we approached implementation, we took steps to manage the technology engagement to keep the effort on track:
1. Guiding negotiations and finalization of the technology vendor contract to optimize costs and ensure timely delivery.
2. Coordinating the technology vendor and the client's operations team to develop a detailed solution proposal
3. Socialized the proposal with stakeholders, adapted it to any feedback, and presented a refined plan for approval
4. Created a rapid deployment plan for a pilot phase.

The early pilot phase was, quite frankly, a key challenge. We confronted organizational adaptability issues and technology issues, and we received plenty of feedback from the end users on how the new process could be more user-friendly.

Step four: Implement with Responsive Methods

Employing agile, data-driven implementation methodology, we collaborated with both the client and the technology partner to understand and address end-user feedback, as well as to resolve the variety of challenges that emerged during the pilot phase.

We were able to rapidly stabilize this complex cross-functional and cross-organization project within one month — when employees started using it.

Step five: Seamless process transition

Not only that, but we committed to a Seamless Process Transition, assuming a role as a conduit between the client and technology partner and assisting our client in acquiring and documenting any technology modifications due to downstream regulation changes.

Success soon followed, and after a year of operation, our contract has been renewed and we are ready to work on additional volumes for not just employee compliance, but contract process compliance as well.

Key Insights

1. Bringing in process design expertise early for Process Imagination and Definition workshops
2. Identifying and engaging appropriate stakeholders and gatekeepers within the organization
3. Thoroughly assessing and prioritizing multiple process options and target operating models — in-house, outsourced, and blended operations — to ensure that the new process meets its objectives
4. Implementing using modern, responsive methods such as agile and data-driven test-and-learn methodology
5. Transitioning the process seamlessly to reap maximum benefits in terms of implementation cost, employee satisfaction, and customer satisfaction

The path to a seamless and enduring process transformation is rarely straightforward. It demands careful and inventive development, from initial planning to final implementation. These five factors can help deliver a successful process transformation.

A savvy organization not only engages its internal resources but also recognizes external parties capable of managing peripheral elements across the value chain.

At Leanopsys, we help you design and introduce new processes in a cost-effective, stakeholder-inclusive, and dependable fashion. We consider best process practices, overall business value chain, peripheral (non-core) functions, and also offer digital transformation and lean implementation opportunities.

Discover how Leanopsys can help you by visiting Leanopsys.com