Genius
L E A R N I N G

" We have not provided our frontline supervisors and managers and individuals with the proper procedures that would allow them to use their common sense."
Oscar Munoz

• How well are your Standard Operating Procedures used?

• Do people welcome process changes and stick to them?

• Have you provided people with procedures that encourage them to think and act in the best interests of the company and the customer?

Writing processes that people will actually use is a fine balancing act – the science of the specific and the art of engagement. But all too often the job of writing is just another thing on people's to do list. As such when they get down to it, they just launch in.

Vital standard operating procedures or even a single new process that explains the 'how to' can often be left to gather dust. People prefer to ask someone more experienced what they do next and, just like chinese whispers, the actual process adapts in real life until it bears little resemblance to the documented specification.

Why does this happen?
It can occur for many reasons. Maybe the process writer is such an expert they find it difficult to translate that expertise into more common, simple terms that others can use. Or maybe the process is extremely complex and by the time the writer has explored some common deviations the main thread is lost to the reader.

Whatever the reason, following these simple guidelines can secure positive process compliance.

1. Start with the end in mind
Rather than launching into step one of the process, think first about the desired outcome of the process. If, for example, the process is designed to solve customer questions quickly, then the element of service needs to be highlighted and explored as part of the process. By holding onto the 'why' of the process whilst developing the steps, you secure greater buy-in as people understand the rationale for the steps – the why provides the context.

2. Keep it real
No process works in isolation. It is important to keep in mind what other things impact on the process and include these in your narrative. This means that people can visualise how things connect and work in reality.

3. Include users
By including end users you not only shape the process in their language and their reality but in doing so you also gain critical buy in for any changes you are implementing.

4. A picture paints a thousand words
Where possible illustrate the process. Trying to explain something in black and white just overcomplicates things. Use screen shots or a photo/video of someone completing the process. In the absence of this a process flow helps to contextualise the steps. Also think metaphorically to help people make sense of a process. Help them paint pictures in their heads by explaining 'just as x does y, this will……'

5. Chunk it up
Avoid treating people like they are stupid and aim to get out of the weeds. Chunk up your steps to the highest level of detail you can so it is easy for people to see the thread of the process. You can support this with a Q&A for all the what ifs and maybes if you need to support it further.

For any non-digital processes aim to keep it simple. And remember that today's digital software is designed to be intuitive so for this, additional, unnecessary complications just inhibit. New software like walkme.com will help people navigate systems easily without spending unnecessary time and resources building back up documentation that needs to be trained in. Let people learn for themselves where you can.