Hello and welcome to Module 9 Lesson 3 of the Process Module, Process Adoption.

So I thought I'd have a little fun with this one and I took the reading material that I hope that you went through before you got to this video and put it through chat GPT and asked, “what questions would you have as a student after reading this material?” And then I had them put into the slide presentation.

So let's see what we got **Engaging Users Early**. How do you identify the right champions?

What specific benefits have been observed? The process champion should be the person who is the best at doing that particular process. And essentially if you were to build out a team of people doing that particular job or that particular task within that job, that you would want to duplicate that individual just across the board.

You want early engagement. You want the process champion to be excited. And they're going to be excited if you're making their job easier. Generally the process champion, if they're so good at what they do, it's because they like what they do. And they would be excited about improvement and being able to do it quicker or more efficiently. And so bringing them in early, not only helps identify what are the areas in the process that might need improvement, but it also helps to create an advocate for when it comes time to implement that change throughout the organization.

Setting Expectations. How flexible should the adoption timeline be given unforeseen challenges? And what metrics or benchmarks should be set to measure?

So I would recommend that processes be an individual’s rocks. So, as this happens, you're not going to just, across the board implement new processes, or across the board evaluate old processes. I would start with one or two. Identify the individual who owns that as their rock. That might be the process champion, or it might be the person that's doing the process documentation.

Probably the process documenter would be the person to own the rock. And that should be an appropriate timeline. Within the quarter, the process is identified, evaluated, and maybe optimized. It really depends on how big of a process it is. Does it involve multiple departments? Is it just one role? It just kind of depends on the scope of the process.

Metrics or benchmarks. I definitely would recommend having metrics or benchmarks especially to identify. Before you create a process or before you evaluate a process, answer the question: “what do we want to see improved as a result of this?”

For example, if it's a customer service process, you might be getting better reviews, or you might have quicker close rates on your tickets or something like that. So, that should be something that you're tracking every week within your weekly meeting. Identify what the ultimate goal is on that. And then you can evaluate throughout the quarter.

Once the process is implemented or as it's being implemented, you can evaluate where you are towards meeting that goal.

Training Initiatives. Platforms or tools you recommend. So, there's quite a variety of tools for delivering hands-on training. We'll be building one within our software here at Chief AI Officer. But until then, there are tools like Whale or Playbook Builder. Just other software that's out there specifically around training and storage of process documentation.

But you can also go sort of old-school. I would definitely use your monthly meeting as an opportunity for training within your leadership team. I would absolutely create a separate meeting for whoever would be using the tool and train everyone who will be using the tool all at once so they're all hearing the same messaging. Make sure that you record the training so that as people are on boarded into that role, this just becomes their part of their onboarding experience. And make sure that it remains updated.

I recommend that within every department and at the leadership team level, you have one process that you evaluate as part of your quarterly planning session. Every process should ultimately get evaluated at least on a yearly basis. If you're breaking it up so that each department is also looking at processes. And I would say that at the leadership team level, make sure that it's a larger process map something like a sales process or product development process. Something that will involve all or most departments.

Simplifying Processes. Are there best practices for soliciting feedback without overwhelming?

Yeah, absolutely. So, there's a myriad of ways that you could do this, depending on how involved you want to get. If your team is in Slack or Teams or wherever the communication is, you could just have a channel specifically around this.

Depending on the complexity, you might want to have a channel for each process. But ideally you're not going to have a ton of feedback once the process is implemented.

You could also create a form if you have a project management tool where you can create a form that people could submit their recommendations there.

But generally if you have as a rock for people to be reviewing processes or you have it as part of your quarterly session, you should be able to solicit the feedback during that period. Otherwise, there'll be a regular cadence there. It someone sees something that's really a red flag, then they could simply bring it to whoever they report to.

Gradual Implementation. Can you provide case studies or examples?

Sure. So, in the case of, let's say, that you deploy a chatbot to support your customer success team. You'll often see improvement rates quickly within the amount of time before a ticket is closed. Or the amount of time an individual needs to spend chatting live, especially if you have it in a way that an individual can escalate if the bot isn't able to answer their questions. That's a really good way to run through concerns pretty quickly. The department or team to be involved in the pilot effort will just be those that would be most affected by the initial processes that you're going to be working on implementing more AI or automation.

Legacy Workflows, How do you manage potential disruptions when phasing out old systems? Are there risks to completely shutting down?

Okay sure there's risks to shutting down a legacy system. So what I would do is, especially if it's a tool that's used within the system, hold on to that tool for a while. And make sure that it's still available for whatever you've used it for in the legacy workflow while you work to get the new workflow really dialed in. That way if there is a major disruption you could always just go back to the legacy tool until the new processes is working well.

So this is pretty simple. You can always be looking for **Automation Opportunities** without actually implementing. Certainly that should be a conversation at least within the department and be approved by the leader of that department before automation is actually implemented.

And as far as checking for updates for new functionalities with tech stack vendors, I'm gonna go out on a limb here and say that any software has new AI that they're implementing is going to be notifying you of that.

There'll be pop-ups in your software and at least the admins will receive emails. But certainly it doesn't hurt to make a quarterly call to your representative within your tech stack. And it's helpful to know what's coming. They don't always tell you what's coming down the pike and if you're checking in to see what's coming, you can sort of prepare for that as well. And it might it might keep you from unnecessarily spending money on a new product in order to provide that functionality.

So, I would suggest **Addressing Resistance** ideally before you experience it. Get the team on board. Help them see the benefits of the change to come. Their job's going to be easier. Their role will be elevated. Whatever the case may be.

But if you do have signs of resistance or hesitation, just have a one-on-one conversation with the person who is showing concern. I mean, their concerns might be valid. So certainly, welcome feedback from people who have concerns because it's quite possible that, especially if they're someone who is an end-user that's involved in the process, that they know something that you don't about it. And it's important to hear what they have to say.

Converting team members into AI advocates. This is just a matter of experiencing it. Oftentimes people do have resistance to things like AI because they can get a little nervous about it. Or feel like it's more complicated than it is. But they just simply have to see and learn how to do it. And if it takes them a little bit more time, then it just requires a little bit more patience.

Demonstrating Benefits. What kind of quick wins should we aim for to build confidence in the new system?

Tracking the metrics as I mentioned previously is a really great way to build confidence in a new system. Because once people see those numbers improving, especially if it's a number that the team has been struggling with for a especially long time and has had a hard time resolving an issue. And then they can see that the issue is being solved then that's a great way to build confidence.

And you can definitely share this within the wider organization. If you're having your quarterly all hands meetings after your quarterly strategic planning session, which I hope you are, that's a great time to share those wins.

And that's it for those questions. Let me know if that was helpful to you. And you've got the email there. Reach out if you have any questions and we'll see you again soon.