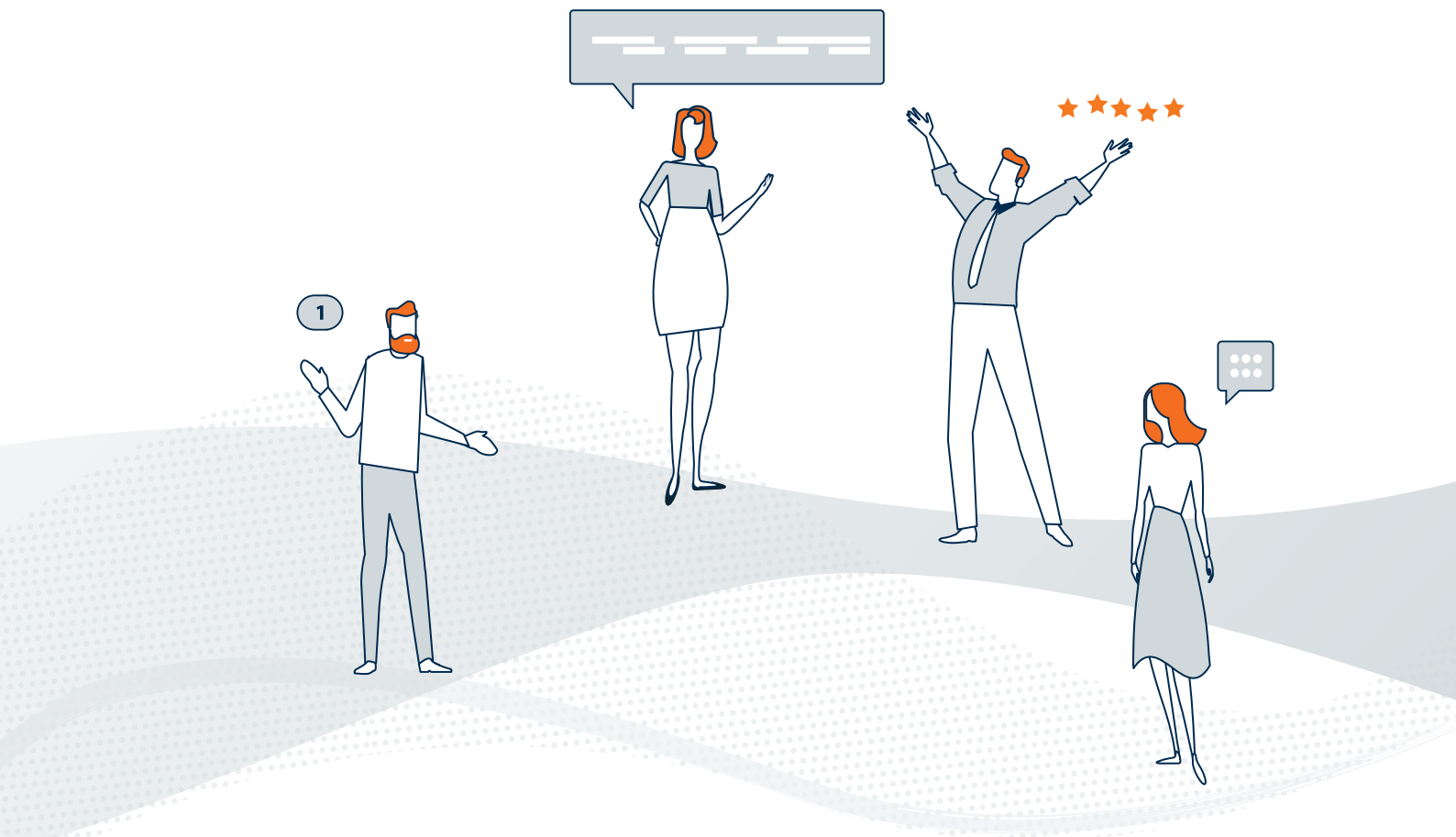


Nintex Promapp™ : Process Playbook

How to get leadership buy-in for process improvement.

Change starts at the top. Get your leadership team on board to maximize your process improvement efforts and engage your teams.



How to get leadership buy-in for process improvement.

Change starts at the top. Process improvement can set your organization up for success, but you'll need to start that shift by getting your leadership team on board if you plan to maximize the full value of your efforts and engage your teams.

Why leadership buy-in matters.

Leaders set the expectations for teams.

They decide what constitutes good performance and signoff on job descriptions. If your leaders do a good job of setting up a positive process management culture, it may even be unnecessary to set KPIs around it – your people will clearly see the value of better processes and get on with the job of creating them, without the need for micromanagement.

Execs are also in a position to lead the charge.

Execs can say, 'Let's not just silo process improvement into one department. Let's make this an integral part of what we do.' They can lead the charge and make change happen. Having leadership buy-in when you start your process improvement journey is essential to maximizing its benefits for everyone in your organization.

Having your leaders on board is key for budget approval.

The costs associated with process improvement can include team training, as well as those related to the implementation of process improvement software. Leaders can ensure enough resources are available to make your organization's continuous improvement culture thrive.



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How do we get leadership buy-in?

Answer these four key questions to help you prepare for getting senior exec support for your process improvement efforts:

1. Who will you approach?
2. Why is continuous improvement worth their time?
3. What actions do you want them to take?
4. How will you sell continuous improvement to them?



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1. Who will you approach?

Creating a strategy to embed a culture of process improvement in your organization should start with one thing: the person you're presenting it to.

Are you talking to one key person on the executive team, or the whole boardroom? You may decide that it's easier to talk to a single executive with a vested interest in process improvement. Alternatively, you could prioritize getting the whole executive team on board.

If you're not sure where to start, try these ideas:

- **Find people who 'get it'.**
Ask yourself: who's got natural alignment? Look for individuals, teams or executive leaders who have responsibilities for operations or continuous improvement. These could include people who manage teams of business analysts, or people who look after quality or compliance.

Roles that can take a step back from the day-to-day and ask the following questions are more likely to immediately see the benefits of process improvement, and champion its use: 'What are we doing here? How can we do this better? How do we actually deliver value to our customers?'
- **Seek out allies.**
Starting a conversation about embedding process improvement into your organization depend on the unique structure of your business teams and the personalities at play. Take the time to really understand your organization and find the best person to approach.

You could take a step back and ask, 'Which person or team brought the idea for a process shift to us in the first place?' By having a chat

with them and getting them on your team, you may find yourself with potential allies who have valuable insights to share about what they have tried in the past.

- **Prioritize the culture shift.**
Business process management can sometimes be perceived as just another software platform, rather than an overall cultural shift. This becomes even more challenging when process improvement efforts sit exclusively within the IT team.

It can be really helpful to have IT involved, but make sure you have other reasons to bring IT experts onto your team other than the fact they know about software. Find the person who gets what you're trying to do and can back you in your efforts.
- **Leverage tech trends.**
While it's easy to get tied up in recent hot topics like artificial intelligence (AI) and robotic process automation (RPA), there are many ways to employ sophisticated automation solutions without investing these trending technologies.

A no-code process automation platform can help companies increase their productivity, offer consistent and improved customer experiences, and reduce the need for paper-based processes. Driving business, maintaining a competitive advantage, and increasing the bottom line are all goals executives care about. The first step in automating a process? Mapping and understanding the steps and people involved.

Bonus: IT is usually a good place to start for process automation, offering a good reason to get them involved in the company-wide process improvement initiative.

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2. Why is continuous improvement worth their time?

Help your leaders see the light. While presenting your case for the value of process improvement, it's crucial to clearly demonstrate why your leaders should allocate a slice of their already-stretched schedule to these efforts.

But presenting a convincing 'why' doesn't go far enough — you also need to demonstrate why you need their help and support.

When you're defining your 'why', it can be useful to look at your original purpose. Why did the organization set out on this journey to start with? What were the issues the company was having? Why did you think a focus on process improvement would be beneficial?

- **Piggyback on strategic objectives**

If you don't have access to the people who were involved in the original decision to begin a process improvement journey, look at what your organization's strategic priorities are

Where are you trying to get to? You may be able to hitch your wagon to those objectives and say, 'How are we going to get there when people are confused about what they are doing?' or 'It's done differently in all of our locations — how can we focus when we're all on different pages?' This might be a great opportunity to specifically show how a more effective process management and improvement approach can help your organization to realize these strategic priorities, and demonstrate why the executive team is so key to successfully embedding this change.

Case study:

Use evidence to drive buy-in.

When a construction company recently conducted a team engagement survey, they were disappointed with the results. They found low rates of work satisfaction among their business teams, lots of confusion, and a lack of clarity around how people could progress within the organization.

The team responsible for that survey put together a really compelling presentation that highlighted the fact that they really needed the executive team to get behind them to address the issue and turn it around.

They followed that up, saying, 'Here is the issue we're seeing with team engagement, and here's how process improvement can help.'

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- **Tell the whole story**

Many of our clients say, 'We're using Nintex Promapp for continuous improvement.' That's fantastic.

But it feels more real and tangible if you flesh that statement out and say 'We're using Nintex Promapp to involve our whole team in continuous improvement, by making processes accessible and having an easy feedback system.'

As you're defining your 'why', look for ways to tell the whole story about what process improvement could do for your teams every day.

Simply asking for buy-in from your leadership team isn't enough – it's important to gather evidence that shows the impact and cost of poor process management. Process mapping makes it easy to discover the cost of inefficiencies and clearly lay out the pain points in each process where automation can help eliminate errors, save time, and cut down on costs.

- **Pain reveals potential gain**

Another way to gain executive support is to clearly identify current pain points in the business. As a general rule, people are a lot more motivated to lessen pain than they are to achieve some idealized future state. If you can identify the pain and present a potential remedy, you're more likely to convince your leaders to get on board.

Once you've found that pain, amplify it, quantify it, show why it's a problem and expand on the impact of that problem. Then show how process management and improvement can help. Remember, the pain points don't necessarily have to be organization-wide — if you've decided to approach the HR director or the CEO to be your executive sponsor, it may be worth discovering the pain points in their particular department or role.

Case study:

Review processes with risk in mind.

When a finance client had completed their regular internal audit, they found plenty to be worried about. Although their processes looked up-to-date, a walk-through found some real risks related to the accuracy and security of their data.

They took this problem to the risk committee, which was made up of people from the executive team. By describing a scenario that could result if the problems weren't addressed, it helped the executives see that their process management was holding the company back.

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Case study:

Make it personal.

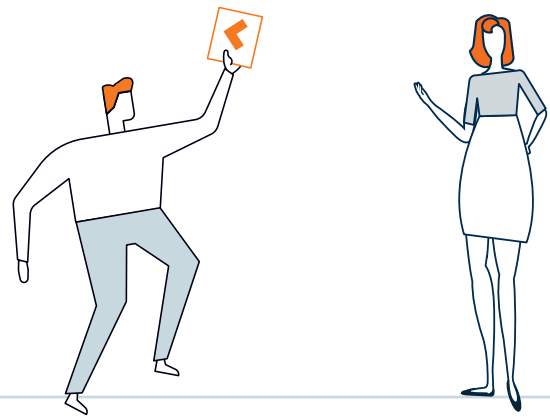
A large healthcare organization was trying to make Nintex Promapp a higher priority for their executives. They knew that the Baldrige Excellence Framework was a popular reference point in their organization and they were able to say, 'The issues that have come up with this framework are things we could address with Nintex Promapp.'

Because they linked process improvement to something that the executive team already knew and cared about, they're now seeing a bigger push from the top to make that cultural change.

• **Target their passion projects.**

When you're targeting a specific sponsor in your organization, ask yourself, 'What are their priorities? What does this person care about more than others? What's something they see as important and are passionate about, even if others may not see it the same way?'

If you can demonstrate how process improvement will facilitate something they care about, you have a better chance of getting them on board with your project.



• **Dangle the legacy carrot.**

In many instances, executives care about making a lasting impact on their organization and leaving some kind of legacy. Implement a process improvement culture as a way to make a real difference and leave a mark.

For some organizations, their main motivation for process improvement is to future-proof operations against sudden change, disruption, or the uncertainty of a more precarious global market. When the risk to your organization is obvious, improved process management can be a powerful tool.

Case study:

The future can be scary.

A local government client was recently preparing for an upcoming legislation change. Past experience taught them to expect greater scrutiny. They were able to say, 'We've had this issue in the past and it was a problem. Let's front-foot this now, to ensure we're ready for change.'



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3. What actions do you want them to take?

- **Present a clear plan of attack**

There's no point in getting your leaders excited about process improvement if you're not explicit about what you're asking for. Have some clear, actionable ideas ready to go, so it's easier for your executives to say yes because they know exactly what they're agreeing to.

Rather than just presenting a vague idea, it's saying, 'We want you to do A, B and C. Can you do it, yes or no?'

- **Identify high-value actions**

Find those activities that deliver maximum impact for minimum input. Let's say you've got 20 minutes of your executive's time per week. What are the most visible things your leaders can do in that 20 minutes? How can they use that time to help people see that process improvement is worth their effort?

- **Encourage visibility**

Work with execs to identify the actions that are going to be most visible to the highest number of people. This may be a regular email update, showing up to meetings, or something else specific to your organization.

If you've got a monthly, organization-wide meeting, ask your leader to spend 20 minutes talking about some of the business' process improvement wins. These demonstrable examples of prioritizing processes can really help to shift the culture and set expectations.

Ask execs to be ambassadors for your clearly-outlined, high-value deliverables.



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4. How are you going to sell it to them?

When it comes to closing the deal, the way you sell the idea of process improvement as a culture change mechanism depends on your organization.

This simple four-step plan is a framework that has helped many clients:

- **Step 1:** Write a business case for why you need executive buy-in. Tell them why the organization invested in process management, why you need their help, and what you could achieve with their visible support.
- **Step 2:** Set a specific meeting. If you're able to get some of your executive's time and dedicate it to talking about process improvement, you've already elevated the topic. You've won a small victory just by getting that meeting and prioritizing the conversation.
- **Step 3:** Create a road map. Be upfront about what you want them to do and when key actions should take place. What is your leader committing to? How realistic is the plan? Who else will be involved? Make it sound clear, compelling and quantifiable.
- **Step 4:** Look for ways to quantify the return on investment. This could be as simple as saying, 'If you lend us a hand and get this done, we'll have 50 processes mapped by a particular date, feedback will be responded to more quickly, and we can create a culture that looks like A, B and C.' It could also be quantified as down-time is avoided, wastage is eliminated, fewer complaints require resolution, or some other metrics that your organization already tracks and cares about.

Using a crisis as the starting point for a process improvement road map can be a really effective way to show leaders why it's worth caring.

Case study:

Provide a clear path to reduced risk.

A rental vehicle client used a very costly incident as a pain point to drive leadership buy-in. As part of their presentation, the team tried to make the problem relatable, while also offering an actionable plan. They clearly stated, 'This is what we're going to achieve, and these are our timeframes.'

By doing so, the risks faced by the organization became more tangible, and leaders had a well-lit path highlighting how they could reduce those risks.

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Maximize your chance of success.

There are a few things you can do to raise an awareness of your process improvement efforts and the benefits it can provide the organization:

- **Ensure your leaders know about Nintex Promapp**

While you are very familiar with Nintex Promapp, your leaders may not be. The Nintex Promapp Difference is a document that offers an excellent overview of how the platform works and why it's useful. It also gives a sense of how intuitive Nintex Promapp can be, so may help to give your executives good insight into the value of the software.

- **Take care of number one**

Hopefully some of these recommendations will help you achieve quick results but if not, a bit of persistence may be required. To support yourself through what could be a long process, try writing a personal 'why' statement.

For some people, their 'why' for advocating for process improvement includes career development, specializing in process development within their own organization or elsewhere, or simply a passionate desire to see process improvement take their organization to the next level.

- **Establish a support network**

As a further support for yourself, talk to your allies and brainstorm with them if you're running into barriers at the executive level. Come along to Nintex Promapp regional user groups where you can talk to people who are facing similar challenges. And, of course, talk to your customer success manager. They will have useful strategies and an understanding of the difficulties you might be facing.

- **Appeal to the grass roots**

If your leaders don't prove to be as receptive as you had hoped, it may be possible to gather your resources on multiple other fronts. It may be easier to get leaders on board if you can show them evidence that teams love improving their processes with Nintex Promapp and are already seeing results by having it in their toolkit. Sometimes a bottom-up approach is the best alternative.



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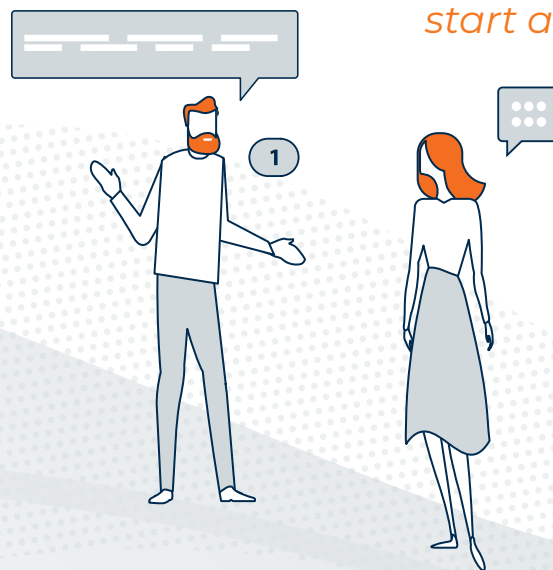
Leadership buy-in starts with a handshake.

At the end of the day, getting buy-in from your leaders to commit to meaningful process improvement isn't about navigating a corporate structure – it's about people, and knowing the best way to start a conversation.

Speak the right language. Whatever terms you use to describe it – process management, process improvement, workflow, or even Nintex Promapp – your chances of getting buy-in will be maximized by your ability to tell stories about how your company and its people are being held back by poor processes.

Change starts at the top. Look for those stories, find the best way to tell them to the right people, and you'll be more likely to see the cultural shift that process improvement can foster in your teams, and across your business.

Getting buy-in is about people, and knowing how to start a conversation.



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