# **How to…assess if a change is needed**

Many times when there is a problem, we immediately jump to the need to change something because something isn’t quite working in our current environment. All too often in today’s world, we immediately jump to the need to do a digital or technology-based solution.

This checklist provides a quick validation to see if a change is really required or is it that we need to do our current process better or make best use of our existing technology?

## **Step 1: Have people been trained properly?**

Generally underperformance is either done to a skills and capability deficiency or a lack of training. When underperformance cannot be fixed with these, people managers are advised to see HR advice to see how to turn underperformance around.

It is not unusual for training materials to be out of date, or for word of mouth/on the job training to become diluted over time. Assess if there is a training need first and foremost.

## **Step 2a: Is there something wrong with the process?**

The next thing to look at is the end to end operational process. Is there a glaring issue – too many handoffs, a blocked channel of communication or a lack of clarity on the policy or rules for decisions?

If the process is documented, a ‘desktop’ analysis can be done, simply reviewing the process as mapped and seeing where there may be issues.

Running a simple process workshop can quickly identify issues or ‘bottlenecks.’ Another method may be to observe the process end to end (although it should be noted people under observation tend to be on their best behaviour for at least the first couple of times they are being observed).

Solutions may be quick fixes – publishing new updated and clearer rules, for example – or take some time – eliminate one team handoff may require training another team to pick up that part of the process, for example.

## **Step 2b: Is there something wrong with the data?**

Data quality issues are something every organisation is faced with. Ensuring good quality data is input and maintained is key to successful operational processes.

Usually it will be very clear if data is the root cause of the problem. Data cleansing is the obvious solution along with increased training for those inputting to reduce the number of errors going forward.

## **Step 3: Is there something wrong with the technology?**

If the training is good and the process is fine, the underlying technological solution may then need to be assessed.

Is it automated enough? Is it user friendly enough? Is it doing what is required or are there a lot of manual interventions?

It is important that any IT related solution is raised with the IT business partner and follows the IT demand management process.

## **Step 4: Is the organisation set-up in the right way?**

This may be where we’ve gotten the strategy wrong and are focused on the wrong priority, or leadership styles and/or actions are driving unintended behaviours.

It could also be that organisationally we think we need to change the model of the organisation to eliminate an inefficiency or make the overall process more effective.

Organisational change can have wide-reaching impact on individuals and should always be discussed with HR.

## **Top Tip**

Always step back and assess whether change is truly needed.