Implementation Best Practices
ProcedureFlow – Implementation Best Practices

Welcome to ProcedureFlow! You’ve gotten the “green light” to move ahead and are thinking “Now what?” We know you have a ton of questions on where and how to get started and we want to ensure your first experience using ProcedureFlow is successful!

The Importance of Change Management

Getting your processes mapped into ProcedureFlow is a huge leap forward! The next step is managing the introduction of ProcedureFlow into the business. Change of any type (even good change!) needs to be proactively planned and managed – it rarely just happens.

Organizations don’t change – people change. If the people impacted don’t adopt the change, the expected outcomes and return on investment (ROI) will never be achieved. Change Management provides the framework for managing the ‘people side’ of change by:

- Increasing the probability of a project’s success,
- Capturing the people-dependant ROI (speed of adoption, ultimate utilization and proficiency),
- Anticipating and proactively managing employee resistance, and
- Building change competency into the organization.

Organizational change is the collective result of each employee embracing and adopting the new way of doing things. To achieve individual change, each employee must transition through the five (5) building blocks or stages, for successful individual change, known as the ADKAR Model:

1. **Awareness** of the need/reason for change.
2. **Desire** to engage and support the change.
3. **Knowledge** about how to change.
4. **Ability** to implement new skills and behaviors required by the change.
5. **Reinforcement** to ‘make it stick.’

Change is successful when the first four (4) stages have been achieved, but you need the fifth stage - reinforcement – to sustain it. In most cases, as much time (or more) is spent reinforcing the change, as we did building awareness for the change in the very beginning.

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Every employee will move through these stages at a different pace and encounter different barrier points based on their own personal circumstances. Identifying where an employee is in the change process allows us to have proactive and productive conversations with that employee, focusing on what their concerns and objections are to the change, what we can do to support them, and how we can help them resolve those issues so they can get onboard.

Failure to consider and address the five (5) stages of the ADKAR Model greatly decreases the probability of a successful change project:

- Without **Awareness and Desire**, you will see employees asking the same questions over and over, lower productivity and higher turnover, hoarding of information and resources, and delays in implementation.
- Without **Knowledge and Ability**, you will see lower utilization or incorrect usage of new technology, employees worry whether they can be successful in the future, negative impact on customers and partners, and sustained reduction in productivity.
- Without **Reinforcement**, you will see employees revert back to the old ways of doing things, much lower utilization than anticipated, and the organization sets a precedent of poorly managing change.

See *Appendix A* for further reference materials for PROSCI’s ADKAR Model.

**The Implementation Plan**

We’ve worked through many successful implementations of ProcedureFlow and we’ve pulled together a step-by-step plan based on the ADKAR Model (complete with the best practices, lessons learned and great ideas that we’ve gotten from our customers along the way) that you can follow to ensure your own ProcedureFlow launch is a success!

For your convenience, we’ve also attached a suggested Implementation Checklist as *Appendix B*.

**Step 1 - Preparing for Change**

1. **Launch Date**

The first thing to decide is when you would like to go ‘live’ and who the first group of users will be. Will you introduce ProcedureFlow to the entire department or organization all at once, or start with a smaller group or upcoming training class?
2. Resources

Pull your implementation team together. Whether you have a large team or a small one, having an implementation team will greatly improve your chance of success. Getting key stakeholders involved at this early stage is critical.

- **Change Manager.** Your Change Manager is the person who will lead and drive the project forward, and be responsible for building and executing the implementation plans.

- **Sponsors.** Lack of active and visible sponsorship is the #1 reason why change projects fail, so make sure they are included on your team! Have sponsors talk about why this change is important to the business, what outcomes are expected to be achieved and the benefits of ProcedureFlow. They can also help you deliver key messages to the organization, get you through any roadblocks along the way, and provide reinforcement for the change post-implementation. But it’s just as important for employees to hear about ProcedureFlow from their managers and direct supervisors, so include them on the team too.

- **Subject Matter Experts (SMEs) - Mappers.** Mappers should be your highest performing, ‘star’ employees. For contact centers, these are your senior agents who consistently have the best quality, average handle time and first call resolution scores. They have years of ‘tribal’ knowledge, experience and best practices trapped inside their heads, all of which you want to capture and represent within the flows, so all employees can benefit from them.

- **Champions.** You need champions - influencers who will bring excitement and energy to the project and who can be evangelists, working to convince every employee that the future will be better with ProcedureFlow.

- **ProcedureFlow User Support.** You’ll want to ensure you have ‘Super Users’ who will be the ‘go to’ people for all things ProcedureFlow. Having them on the implementation team ensures they have the in-depth knowledge of the software and its implementation to provide the necessary on-site support to employees during and after the launch.

- **Representative Employees.** You need to determine who will be impacted and affected by the introduction of ProcedureFlow. ProcedureFlow is going to change the way they do their jobs, so
it’s critical to include them in the planning phase. Their input will be invaluable and will go a long way to getting user buy in later. Depending on the scope of your initial launch, this group could include supervisors, senior and front-line employees, trainers, quality and tier two support.

3. Entry Points and Mapping

Entry Points. Before any mapping takes place, thought should be given to how your ProcedureFlow environment will be set up in terms of entry points. Entry points are a collection of related flows to which users will be assigned and given access.

If you are starting with only customer support, it’s likely you only need one entry point to start – more can be added later as ProcedureFlow grows within your organization. However, if you are mapping more than one category of flows, customer support and monthly invoicing for example, you’ll need separate entry points. Why? Because your customer support team doesn’t care about changes to the monthly invoicing and vice versa. Mapping these flows under separate entry points prevents users from being inundated with change notifications about procedures they don’t care about and don’t need to complete their work.

Mapping. Figuring out what to map and which processes to start with can be overwhelming and we’re always asked where to start. Anyone with process improvement or Lean Six Sigma training will tell you 20% of your processes cause 80% of your problems.

Decide which processes are causing the business the most pain and start from there:

- Which tasks do employees hate doing? Which ones do they always have trouble with? Which ones are often escalated to supervisors or to Tier Two?
- From that list, then determine which ones need to be executed on a regular basis, or represent a significant portion of call volume coming into the center?

Once you’ve determined which processes will be mapped first, the next question is “how much detail do I need?” This will vary depending on who the end users will be, so put yourself into their shoes and go back to why you’ve chosen to implement ProcedureFlow in the first place. If the expected outcomes are to reduce training time and ramp time for new employees, the flows will need detailed step-by-step work instructions.

As discussed above, mappers should be your highest performing, ‘star’ employees. While it may be difficult to take SMEs away from their day-to-day responsibilities, capturing their years of knowledge and experience in ProcedureFlow and putting it directly into the hands of every single employee helps you to turn every employee into a star.

A good rule of thumb is that a process which takes 3-5 days of training will take about 16-20 hours to map into ProcedureFlow. But this doesn’t have to be done all at once - we recommend mapping in 3-4 hour blocks at a time.
The last thing you may want to consider is whether you feel comfortable mapping on your own, or if you will require the help of our Best Practices Team. Your SMEs will need to learn the best practices and mapping conventions that should be followed. The basics can be learned from mapping sessions with our Team, or from our online help resources. Reviewing knowledge base articles and training videos on help.procedureflow.com, our ‘Mapping Best Practices’ manual and the training webinars at procedureflow.com/webinars, will give you a great foundation to start mapping on your own, but we are always available if you need help!

4. Measurements

You’ve already outlined the business case and the expected ROI in making your decision to implement ProcedureFlow. But now we need to dig deeper and decide how you’ll measure whether the project is successful. How will you determine whether ProcedureFlow has improved your business? The old adage ‘You can’t manage what you don’t measure!’ holds true even today.

Metrics of success vary widely from customer to customer, and is often dependant on what data (qualitative or quantitative) is available and how easily it can be measured. To give you some ideas, listed below are some metrics that our customers have previously used. What’s critical is that you measure those activities or results that are important to successfully achieving your organization’s goals!

- Training time and mentoring time
- Quality and number of errors
- Average handle time
- First call resolution and number of escalations
- Time to document processes in ProcedureFlow vs. Word/Visio
- Time to proficiency
- Rate of attrition
- Customer Satisfaction Scores
- Number of claims processed or orders submitted
- Employee Satisfaction or Engagement Scores

Once you’ve determined which metrics will be measured, the next step is to establish a benchmark pre-ProcedureFlow measurement for each metric. The same metrics will be measured again after the implementation is complete to see what has improved and what hasn’t.
Step 2 – Managing the Change

This is where organizational change management meets the five (5) stages of individual change management. Communications and active sponsorship address Awareness, Desire and Reinforcement. Training classes and resources address Knowledge and Ability. Proactive resistance management addresses Desire and Reinforcement.

5. Communications

Introducing any change into an organization requires a solid marketing campaign and communications plan to get every employee on board. The implementation of a new technology is no different – implementations fail because there is a lack of communication about why the change is needed, how it will impact employees, and how the new technology will benefit the organization.

Employees need to understand what benefits the new technology is bringing to the business – what problem is it going to solve, what’s driving the change, how is it going to affect them and change the way they work, and why is it better than what they were using before? You need to help employees ‘cross the bridge,’ so get your sales pitch ready! We need to build excitement and anticipation leading up to Launch Day.

- Think about who will be impacted by the changes, in what way(s) and how many different audiences you have (executive, senior and junior employees, trainers, etc.). Is different messaging required for each one?

- Get middle management and supervisors on board ASAP – they are the key to a successful implementation and will be directly responsible for managing the change with employees. Managers and direct supervisors have more influence over an employee’s motivation to change than any other person in the organization. They can build support for the change with their employees, manage resistance, and reinforce the change going forward. They are also a key liaison for the project team – they can provide an accurate view and feedback of how change is impacting employees and how effectively it is being adopted (or not).
• Get your champions, influencers and ‘star’ employees involved early on. They’ll have valuable insight into what should be included in the messages to connect with employees. They’ll also be able to coach other employees on how to fully utilize ProcedureFlow for their own benefit. After the launch, give them Contributor status so they can actively contribute to making your processes the best that they can be. Nothing creates engagement like ownership!

• Figure out who will resist the change and plan how you’ll overcome this. A great idea is to get possible resistors directly involved as part of the implementation team or as a ‘Super User’. They’ll be far less likely to resist something that they’ve been a part of!

• Develop key messages for each group of employees, decide how, when and by whom they should be delivered. Then say it again and again and again .... in as many ways as you can (kick-off events, newsletters, emails, one-one conversations, desk drops, brochures, ‘change’ toolkit, hands-on demos, posters, round tables, informal Q&A coffee or lunch sessions, webinars, etc.). Most employees will need to hear it 5-7 times before they will completely internalize the message(s).

• Release a ‘pre-launch’ teaser video with a message from the project’s executive sponsor(s), or a testimonial video with managers, supervisors and/or champions talking about how ProcedureFlow has already made a positive impact on the business. Scroll down on our home page on procedureflow.com for an example video released by Medavie BlueCross.

• Put visual reminders everywhere! Reinforce the key messages with internal newsletters and digital signage (include the executive sponsor video and the testimonial video from a SME, champion or Super User), put up posters, announce the launch on your company intranet or SharePoint, etc.

• Don’t be afraid to have some fun! Once some of the mapping has been completed, have an open house or a drop-in lounge with coffee, sweets and fruit where employees can come and get a hands-on preview of what’s being built.

• Ask employees to complete a pre-ProcedureFlow survey and use it to reinforce the key messages of how ProcedureFlow is going to make their life easier.
• Send out pre-launch ‘Welcome Packages’ containing a brochure introducing ProcedureFlow and reinforcing the key messages, a Launch Day agenda and training schedule, links to internal and online help resources, and some ProcedureFlow ‘swag’ such as water bottles, coffee mugs or stickers. Just let us know what you’d like to include in the packages and we’ll try our best to accommodate your request!

If you are planning to remove whatever technology your employees are currently using after the implementation (knowledge base, wikis, mentor helpline), make sure this is included in your messaging! While this is may be viewed negatively by some employees, it is a huge change to how they do their work and they need to be prepared for it. So let them know early on!

6. Administration

ProcedureFlow has five different user roles with increasing levels of permissions. **Viewers** have read only status and **Contributors** can pull a draft and submit suggested changes for approval. Most of your employees will have one of these roles.

Moving outward, you then have **Approvers**, who can pull a draft and edit flows, but can also approve suggested changes and publish them to the live where they are accessible to the whole team.

Finally, with the highest level of permissions, you have **Entry Point Admins** and **Org. Admins**. Your SMEs/mappers will likely be given Admin status in order to set up the structure of your ProcedureFlow environment and to be able to quickly map, approve and publish the initial content build.

As the initial mapping nears completion, you’ll need to decide who will be assigned as additional Org. Admins and Entry Points Admins. They’ll be responsible for user administration (adding, disabling, changing users’ role and entry point access) and accessing ProcedureFlow’s reporting features. These reports tell you the date on which a user was last logged in and how many unreviewed changes they have.

You’ll also need to decide who will become the Approver-Owners of the various processes, responsible for approving and declining changes, and maintaining the processes to ensure they are kept current and up-to-date. Approvers-Owners should be senior and tenured employees who have the subject matter expertise and experience to look at a suggested change and decide whether it should be declined, revised, or approved and published to the live environment and the rest of the team.
7. **Flow Validation**

Once all flows have been mapped into ProcedureFlow and completed, it’s important to hold validation sessions with both senior and junior employees, Super Users and Approver-Owners to do a complete review of all the flows. These sessions are extremely helpful for several reasons:

- **Does the home page make sense?** One thing we find customers often have trouble with is how to set up the home page for their entry points. Employees need to easily find what they are looking for and information can’t get ‘lost in translation’ between what the customer is asking for and how it’s been represented in ProcedureFlow. Both senior and junior employees will have valuable input and bring a different perspective on what the home page should look like and why.

- **Senior employees may know of a more effective and efficient way to complete certain tasks, or may have additional tips, tricks or shortcuts that could be added to the flows that all employees can benefit from.**

- **More junior employees will be able to quickly point out any gaps or missing information, and identify areas that require additional clarification from the perspective of a new employee.**

- **People often have different ways of doing things. These sessions provide an opportunity for the team to reach a consensus on what the best practice should be.** Allowing employees to participate in deciding what that is gets everyone on the same page.

With these sessions, any additional changes and revisions to the flows can be completed and even made ‘on the fly’ during the session itself. You can be confident that the organization will have the best possible version of the processes for Launch Day.

8. **Training and Orientation**

To get users to adopt and start using ProcedureFlow, they first need to get comfortable with it – training is a critical part of the implementation.

First determine who is going to deliver the training. Do you want our Best Practices Team to provide the training for your employees (either remotely or on site), or would you prefer to deliver the training on your own? Our ‘Train the Trainer’ goal ensures we have equipped you with everything you need to be self
sufficient in training your employees, launching ProcedureFlow successfully, and even expanding ProcedureFlow to other parts of the business.¹

Training will likely take place over several days and will involve several different groups of employees:

- **Change Management Team.** Do the members of your team need formal change management training, or do they have experience and knowledge about change management methodologies already? How about your sponsors, managers and supervisors? These parties all play a critical role in ensuring that the change is successful. They need to understand the importance of and become comfortable in their role(s) and we need to equip them with the knowledge, tools and resources required for them to do so.

- **Supervisors, Quality and Tier 2.** Employees should be encouraged and directed back to ProcedureFlow from all sides whenever they have a question, and this group will play a key role in doing so. They must be trained and knowledgeable about ProcedureFlow, and are often targeted to become Super Users and assigned as Admins and Approvers.

- **Trainers.** Implementing ProcedureFlow will significantly impact how training is delivered, transforming from traditional classroom training to ‘learning by doing’ using real life scenarios. As such, the current training curriculum will need to be revised to include ProcedureFlow. The training room should also be equipped with dual monitors, so trainees can always have ProcedureFlow on their screens. (In fact, ensuring all employees have dual monitors as part of your ProcedureFlow launch is a great idea!) Trainers are often also assigned as Admins and Approvers.

- **Mappers.** If documenting your processes is going to be an ongoing project, you may also want to consider training additional mappers and get them familiar with our mapping best practices and conventions.

- **Employees.** Training for both new and existing employees will depend on what role they will be assigned. Those with Viewer status require only a general overview of what ProcedureFlow is, what

¹ This includes our online help resources at help.procedureflow.com and procedureflow.com/webinars, our Implementation and Mapping Best Practices manuals, draft training presentations and speaking notes, posters, etc. If you need additional training content, we’re also happy to build resources customized to your business needs.
the shapes mean and how to navigate, search for and follow a flow. For employees who will have Contributor access or above, additional training is needed.

Prior to the training, you’ll need to invite users into your ProcedureFlow environment, so they can set up their account and start to review the flows. We suggest sending out an introduction and welcome email first – before you send the system generated invitation from ProcedureFlow. This lets employees know to expect the invitation and helps to avoid confusion when it hits their inbox. For your convenience, we’ve attached a suggested text for this email as Appendix C.

Finally, for those employees who are not able to attend the training, we recommend recording the sessions and posting them to your SharePoint or LMS, along with links to our online help resources and FAQs.

9. Employee Resistance

An employee’s ability to embrace a change is impacted by many things: lack of awareness of the need for change, the impact on their current job role, their personal and family situation and career plans, the degree the change will impact them, the organization’s history with past changes, the amount of change currently going on within the organization, etc. Resistance is normal – expect it and plan for it!

Managers and supervisors are the key to managing employee resistance, but they must be provided with the tools, resources and support necessary to do so. Attached as Appendix D is a detailed list of tactics that can be used by managers and supervisors to manage employee resistance.

10. Launch Day!

Congratulations – it’s Launch Day! You’ve done a lot of work to get this far so make it an event, make it fun and celebrate!

**Agenda.** If you haven’t already done so, pull together an agenda and schedule for the day so everyone knows what’s going on and where they need to be, and send this out prior to Launch Day. (Bonus points if you’ve already thought about this and sent it out as part of your ProcedureFlow Welcome package!)

**Support.** Think about what you’ll need for employee support on Launch Day. Do you need a member of our Best Practices Team to be on stand by (either on-site or
remotely), or are your trainers, SMEs and Super Users able to provide any employee support that will be needed?

**Launch Video.** Release a Launch Day video with a message from the executive sponsor, reinforcing the benefits of ProcedureFlow and your other key messages.

**Launch Activities.** Get employees excited and involved with various activities throughout the day:

- Have coffee, sweets and fruit in the morning, a pizza ‘lunch and learn,’ or ice cream, cake and balloons, or host an informal Q&A session. (We even had one customer who made ProcedureFlow-shaped cookies for Launch Day!)
- Have a ProcedureFlow scavenger hunt! Hide an image in your flows and provide clues on where it’s hidden, with a prize for the first employee who finds the ‘treasure’.
- Try gamification! Introduce an incentive program and tap into your employee’s competitive spirit – offer rewards and prizes for the first employees to have 10 logins, the first to have 3 changes approved, etc. A little recognition goes a long way!

**Remote Employees.** Don’t forget about remote employees. ProcedureFlow can become a critical element to supporting your remote employees, but only if they use it. So make sure you do something on Launch Day that they can be included in.

Whatever events you have on Launch Day, they should be high-spirited, engaging and fun!

**Step 3 – Reinforcing the Change**

**11. Follow Up / Health Check**

Here’s where it gets exciting - finding out how ProcedureFlow improved your operations and by how much! After Launch Day, you’ll need to decide how long you’ll need to collect data for each measurement of success to make meaningful comparisons against the benchmarks taken prior to implementation. Again, this is dependant on the customer, the type of data being collected and the timing.

Once we’ve completed the comparisons between the ‘pre’ and ‘post’ implementation metrics, we can see which ones have improved. Those that have improved should be communicated and celebrated throughout the organization. Use this great news story to build your business case and show employees how ProcedureFlow has already improved your business. These ‘quick wins’ and successes go a long way to helping employees adopt and get on board with using ProcedureFlow.

For those that haven’t improved, dig deeper and see if there’s something else at play. For example, if quality hasn’t improved and employees are still making the same amount of errors as before, investigate:

- if employees are logging into ProcedureFlow and using the flows (and if not, why are they resisting),
• if further revisions are needed to make the flows simpler and easier to understand and follow,
• if employees would benefit from some additional training on ProcedureFlow.

Finally, you’ll want to get feedback from your employees! You’ll have an uphill battle trying to get employees to adopt something that they don’t like, so it’s important to get this feedback as soon as possible. Attached as Appendix E is an example of a Post ProcedureFlow Survey that we send to every customer. Depending on the numbers of users in your organization, you could have employees complete the survey on pen and paper, or use a platform like TypeForm or Survey Monkey so they can complete it online. Managers and supervisors should also be continuously gathering feedback from their employees and providing it back to the project team so that any necessary corrective action(s) can be taken.

12. Control Plan

Following Launch Day, it’s critical to keep reinforcing your key messages, communicating your successes and driving employees to use ProcedureFlow:

• Track your usage statistics to ensure users are logging in and reviewing change notifications. Decide how often you want to check usage numbers (daily, weekly or monthly) and assign responsibility to the appropriate Admins to generate these reports and send them to the supervisors for follow up.

• Drive employees to make ProcedureFlow part of their everyday routine – stop sending updates and notifications by email, require employees to include the flow number in the Notes/Comments section of every support ticket or customer contact, remove access to the knowledge base, wikis, mentor help line used prior to implementation, etc. Many customers create a ‘Bulletin Board’ on their homepage where daily updates are provided.

• Reinforce the use of ProcedureFlow through new contests, incentives and employee recognition.

• Ensure that whenever an employee has a question on a process, they are always directed back to ProcedureFlow from all sides – managers, supervisors, trainers, quality, Tier 2, etc. – to find the answer.

• Invest in ‘Management by Walking Around.’ Managers, supervisors and possibly even directors should be walking the floor, doing ‘desk drops’ and checking who has ProcedureFlow open on their screen, encouraging employees to use ProcedureFlow and thanking those who already are. Even sitting with employees for a few minutes to see how they are using ProcedureFlow and how they feel about - What do they like? What do they think can be improved? Do they think it’s better than what they were using before? - goes a long way to getting employees on board.
• Offer refresher ProcedureFlow training sessions on a regular basis for employees to attend.

• Communicate and celebrate your successes! Find ways to keep your employees interested using ProcedureFlow updates (‘We’re in the processing of mapping our Collections processes. Stay tuned for more!’), helpful user tips and tricks, user success and employee recognition stories, upcoming training sessions, links to online help or LMS training videos, and ever improving metrics.

A successful ProcedureFlow launch in one department will often spark curiosity and interest around the organization. Once word starts to get around of the benefits, improvements and the positive impact to your bottom line, don’t be surprised if other parts of the business come calling to see how they can take advantage of ProcedureFlow as well!

**Where do I go for help?**

If you have any other questions or concerns about the above or how to use ProcedureFlow, please don’t hesitate to reach out to the ProcedureFlow helpline at 1 (888) 827-3918 or email us at help@procedureflow.com.

If you want some more self-serve options, you can:

• search our knowledge base of help articles at help.procedureflow.com, including our ‘how to’ videos for Viewers and Contributors, or
• watch our OnDemand training webinars at procedureflow.com/webinars.

Thank you for being an amazing customer! We want to make your first experience using ProcedureFlow a success and are available to support you in any way we can - we want to make sure you’re comfortable and getting the most out of this tool!
APPENDIX A – PROSCI’s ADKAR Model for Individual Change Management

Reference Materials:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Completed</th>
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<tbody>
<tr>
<td><strong>1. Choose Launch / ‘Go Live!’ Date and Initial Users</strong></td>
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<tr>
<td>- Start with small pilot group?</td>
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<td>- Introduce PF into the next training class?</td>
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<td>- Bring on the whole department at once?</td>
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<tr>
<td><strong>2. Identify and Assign Implementation Team Resources</strong></td>
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<td><strong>3. Map Processes into ProcedureFlow</strong></td>
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<tr>
<td>- Determine entry points structure</td>
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<tr>
<td>- Choose which Processes to map first</td>
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<tr>
<td>- Choose and assign SME(s) for mapping</td>
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<td>- Decide if help from PF Best Practices Team needed</td>
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<td>- Schedule mapping sessions and block calendars</td>
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<td><strong>4. Determine Measurements of Success</strong></td>
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<tr>
<td>- Define metrics to evaluate success of PF</td>
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<tr>
<td>- Calculate benchmark measurements</td>
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<tr>
<td><strong>5. Launch Marketing and Communications Campaign</strong></td>
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<tr>
<td>- Identify all user groups impacted by introduction of PF</td>
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<tr>
<td>- Get managers, supervisors, influencers and ‘star’ employees on board as PF Champions and Evangelists</td>
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<tr>
<td>- Determine who will resist and why (and what you'll do to overcome this resistance)</td>
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<td>- Develop key messages for each user group</td>
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<tr>
<td>- Decide how, when and by whom they'll be delivered</td>
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<tr>
<td>- Make it Visual (posters, digital signage, newsletters, etc.)</td>
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<tr>
<td>- Release &quot;Teaser&quot; Video with message from Executive Sponsor and user testimonials from SMEs and Champions/'Super Users'</td>
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<tr>
<td>- Have some fun! (naming competition, open house/drop in lounge with coffee/sweets where users can get a preview)</td>
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<tr>
<td>- Conduct pre-ProcedureFlow Employee Survey</td>
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<tr>
<td>- Send out pre-Launch Day 'Welcome Packages'</td>
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</tbody>
</table>
### 6. Choose Administrators and Approvers-Owners

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### 7. Complete Validation of Flows

- **Finish Final Revisions to Flows before Training**

- [ ]

### 8. Deliver Training and Orientation Sessions

- **Decide When and Who will Deliver Training**

- [ ]

- **Choose and Assign ‘Go Live’ Support Team**

- [ ]

- **Evaluate Training Environment (need dual monitors?)**

- [ ]

- **Determine How Many Different Groups Require Training and if separate sessions will be required for each**

- [ ]

- **Gather Training Resources Needed and Design Content for required training sessions**

- [ ]

- **Schedule Training Sessions for User Groups**

- [ ]

- **Revise ‘New Employee’ Training Curriculum**

- [ ]

- **Set Up Users Accounts / Permissions Prior to Training**

- [ ]

- **Post Recorded Training Sessions on LMS or SharePoint**

- [ ]

### 9. Launch / 'Go Live' Day!

- **Draft Agenda and Deliver to Users before Launch Day**

- [ ]

- **Release Video with Message from Executive Sponsor**

- [ ]

- **Make it an Event and Celebrate! (have a PF scavenger hunt, tap into users’ competitive spirit with an incentive program to encourage them to use PF, have coffee, pizza or ice cream ‘social’ and host relaxed informal Q&A session)**

- [ ]

- **Don't forget about Remote Employees!**

- [ ]

### 10. Follow Up and Health Check

- **Collect Data on Success Metrics and Compare to Benchmarks**

- [ ]

- **Communicate and Celebrate Improvements in Metrics with Users and Organization**

- [ ]

- **Investigate Further into Metrics that didn’t improve to determine why and what else can be done (do the flows need to be revised, do the users need additional training, etc.)**

- [ ]

- **Conduct post-ProcedureFlow Employee Survey and communicate encouraging and positive responses with Users and Organization**

- [ ]
## 11. Implement Control Plan

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<thead>
<tr>
<th>Activity</th>
<th>Checklist</th>
</tr>
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<tbody>
<tr>
<td>Continue Tracking Usage an Develop Plan for How and Who will be responsible for generating/providing reports</td>
<td></td>
</tr>
<tr>
<td>Make PF part of Users' Daily Routine</td>
<td></td>
</tr>
<tr>
<td>Continue to Reinforce Use through contests, incentives and employee recognition activities</td>
<td></td>
</tr>
<tr>
<td>Ensure Users are Directed back to PF for all questions/inquiries</td>
<td></td>
</tr>
<tr>
<td>Invest in 'Management by Walking Around'</td>
<td></td>
</tr>
<tr>
<td>Offer Refresher Training Session Regularly</td>
<td></td>
</tr>
<tr>
<td>Continue Communicating and Celebrating Successes! (posters and newsletters with PF Updates, user tips and tricks, user success stories, improving metrics, etc.)</td>
<td></td>
</tr>
</tbody>
</table>
APPENDIX C - Welcome Email to Users

Welcome to ProcedureFlow!

In preparation for your upcoming training session, you’ve just been sent an email invitation to join the [organization name] ProcedureFlow environment. Please let me know if you don’t receive the email invitation. It may also go to your Junk Mail folder, so you’ll want to check there as well.

Once you’ve received your invitation, your next steps to finish setting up your ProcedureFlow account are as follows:

1. You’ll need to click on the link inside the email invitation.
2. Once at the PF landing page, you’ll need to enter (1) your name as you want it to appear in ProcedureFlow and (2) choose your password.
3. After you’ve set up your password, anytime you want to access ProcedureFlow, just log onto app.procedureflow.com (or go to procedureflow.com and click the “Log In” link in top right-hand corner of your screen). We recommend that you bookmark ProcedureFlow in your internet browser and save your login credentials for easy future access.

You’ve been added as a [assigned role] on the [name of entry point(s)] entry point(s).

We would encourage you to take 5 minutes and review the knowledge base articles under the [assigned role] role on ProcedureFlow’s Help page, help.procedureflow.com, as well as the training webinars at procedureflow.com/webinars. They will give you a great introduction to using ProcedureFlow.

Have a great day!

[your name]
APPENDIX D – PROSCI’s Top 10 Tactics for Managing Resistance

1. **Listen and understand objections**

   A critical step any manager should take when creating desire to change is to listen. The power of true listening and empathy is often underestimated. In many cases employees simply want to be heard and to voice their objections. Understanding these objections can often provide a clear path toward resolution. Listening can also help managers identify misunderstandings about the change. Rumors and background conversation often produce incorrect messages and wrong perceptions. Only through listening can managers identify these wrong perceptions and provide a correct and clear story about the change.

2. **Focus on the "what" and let go of the "how"**

   In some types of changes, it is effective for managers to let go of the "how" and simply communicate "what" needs to change. This process transfers ownership of the solution to employees. Managers can share a clear vision of the end state, along with specific goals and timelines with employees. Employees then take on the task of achieving that vision. Employee involvement and ownership naturally builds desire to support the change, and ensures that employee objections are addressed in their solution. the total number of employees is sufficiently large that they all cannot reasonably be involved in and take ownership of the design.

3. **Remove barriers**

   Desire to change can be inhibited by obstacles or barriers. These barriers may relate to family, personal issues, physical limitations or money. What may appear to be resistance or objections to the change may be disguised barriers that the employee cannot see past. Identify the barriers clearly and determine ways that the business may be able to address these barriers.

4. **Provide simple, clear choices and consequences**

   Building desire is ultimately about choice. Managers can facilitate this process by being clear about the choices employees have during change. In many cases, the actual change may be out of the control of front-line supervisors and managers. In these cases, it is very important that managers communicate in simple and clear terms what the choices and consequences are for each employee.

5. **Create hope**

   Many people will respond to the opportunity for a better future. They want to have hope. Managers can create desire to change by sharing their passion for change, creating excitement and enthusiasm, and creating hope in a better future for employees and for the organization. People will follow a leader that can create hope and whom they respect and trust.
6. **Show the benefits in a real and tangible way**

For some employees seeing is believing. Demonstrating the benefits of change in a real and tangible way can create desire with employees. Making the change real and demonstrating that success is possible can remove doubts and fears that some employees feel about change.

7. **Make a personal appeal**

When a manager has a close working relationship with an employee, using a personal appeal to support the change can create desire within an employee. A personal appeal works best with honest, open relationships where there is a high degree of trust and respect.

8. **Convert the strongest dissenters**

Within every organization there exist outspoken opinion leaders. When one or more of these strong and vocal employees are against change, they can negatively influence many other employees within the organization. By targeting these strongest dissenters, managers can use special tactics and interventions suggested here to convert these employees to support the change. By doing so, the strongest dissenters can become your strongest advocates. They are often equally vocal in their support as they were in their resistance.

….. and ONLY as a last resort!

9. **Demonstrate Consequences**

Removing a key manager that is demonstrating resistance to change sends a powerful signal to the organization as a whole. The message is:

- They are serious about this change.
- Resistance will not be tolerated.
- The consequences for not moving ahead with the organization are real and severe.

Termination packages, early retirement offerings or a number of other programs can make this process good for the manager leaving, and at the same time send the right message to the organization.

10. **Offer Incentives**

When mid-level or senior managers are resistant to change, yet are critical to the success of the change and the organization, incentives (such as compensation, bonus or promotion) may be required to secure their support.
APPENDIX E – Post Implementation User Survey

**ProcedureFlow Post Survey**

Thinking about your own experience since the launch of ProcedureFlow, please rate the following items on a scale of 1-10 (where 1 is the lowest/worst score and 10 is the highest/best score).

<table>
<thead>
<tr>
<th>Question</th>
<th>Scale</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. How easy is ProcedureFlow to use?</td>
<td>Very Hard (1) → Very Easy (10)</td>
</tr>
<tr>
<td>2. Does it help you feel confident that you’re doing the right things and getting the right information?</td>
<td>Not Confident (1) → Very Confident (10)</td>
</tr>
<tr>
<td>3. Has ProcedureFlow decreased the number of times you reach out for support or questions?</td>
<td>Still Reach Out Lots (1) → Hardly ever reach out (10)</td>
</tr>
<tr>
<td>4. Has ProcedureFlow improved your ability to complete your tasks(s) successfully the first time?</td>
<td>No (1) → Yes (10)</td>
</tr>
<tr>
<td>5. Has ProcedureFlow decreased the amount of time it takes to complete your task(s)?</td>
<td>No (1) → Yes (10)</td>
</tr>
</tbody>
</table>
6. Will ProcedureFlow help with training new employees?

[1  2  3  4  5  6  7  8  9  10]
No

7. How likely are you to recommend ProcedureFlow to colleagues and other parts of the business?

[1  2  3  4  5  6  7  8  9  10]
Not Likely

8. What are the top three things you like about ProcedureFlow?

1. ________________________________________________________________
2. ________________________________________________________________
3. ________________________________________________________________

9. What are the top three things you would like to see improve?

1. ________________________________________________________________
2. ________________________________________________________________
3. ________________________________________________________________

10. Additional Comments (Please use this space to add any thoughts/ideas not covered in the survey.)

__________________________________________________________________________________________________________
__________________________________________________________________________________________________________
__________________________________________________________________________________________________________

11. Tell us about yourself:

   Your Current Role: ___________________________________________  # Months in Current Role: ________________

   Thank you so much for your feedback!