



Strategic Process Development: *The Path to Organizational Excellence*

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Investment in Organizational Processes

Investment, in its traditional sense, is often understood as a deferral of present consumption in anticipation of future benefits. This concept not only applies to direct financial investments, such as retirement savings but also strategic organizational investments, particularly in developing efficient processes.

In many organizations, process development is approached one of two ways: either meticulously strategized or allowed to evolve passively. This could be analogous to investing vs. gambling – while both approaches can yield results, the structured strategy typically offers a more reliable path to favorable outcomes.

This paper examines the nuances of process investment in organizations, drawing upon insights from various Request for Proposal (RFP) teams and extensive industry experience. Our goal is to unpack the challenges and opportunities inherent in process development and to understand why this critical aspect of organizational strategy often remains underutilized.

Challenges in Effective Process Implementation in Organizations

A common misconception among many organizations is that their competitors have effectively mastered the art of process implementation. However, an in-depth examination reveals that consistent success in process management is rare, even among larger, otherwise successful corporations. It can be incredibly difficult to garner sufficient support from both employees and senior leadership, and often, the urgency to develop and implement robust processes is overshadowed by more immediate concerns, leading to indefinite postponements.

Moreover, when processes are documented, it is frequently a reactive measure to a recent risk event, aimed at mitigating future risks. This “bandaid” approach tends to result in processes that exist in theory more than in practice, adhered to rigorously in the initial stages but gradually neglected as the immediate impact of the risk event diminishes. This trend raises critical questions about organizational culture and priorities: Is the emphasis on immediate results undermining the long-term strategic thinking necessary for successful process implementation?

The decline in social cohesion and community engagement, as discussed by political scientist Robert D. Putnam in “Bowling Alone,” presents significant implications for organizational processes. Putnam’s analysis of diminishing social and civic engagement, exacerbated by the rise of COVID-19 and the subsequent shift towards a decentralized workforce, raises questions about the role of shared values and collective goals in fostering effective organizational change. The erosion of a communal ethos, marked by a focus on individualism, poses challenges to the collaborative nature required for successful process implementation.

Is the problem the combination of skills and actions required to create and implement a process? In “Switch: How to Change Things When Change Is Hard”, Dan and Chip Heath write, “To change behavior, you’ve got to direct the Rider, motivate the Elephant, and shape the Path.” Which is to say that to make changes we require clear direction, an emotional connection to the goal, and an environment that will support and foster the desired outcome.

People Power

Effective organizational change is a people-centric process, rather than merely a structural adjustment. Elisabeth Kübler-Ross’s insight that organizational transformation occurs through individual personal transitions is crucial. The four stages of the curve – Shock/Denial, Anger/Fear, Acceptance, and Commitment – illustrate the emotional journey individuals undergo during organizational changes.

Effective management of change processes entails guiding employees through these stages. This requires a strategic approach that involves communication, transparency, and active support. The initial stages of shock and denial are pivotal; only when these are addressed can the process become ingrained within the organizational culture, leading to its eventual acceptance and adoption.

Furthermore, organizations have a responsibility to consider the emotional well-being of their employees, particularly in times of economic uncertainty. The attitude of viewing employees as merely “lucky to be employed” can be detrimental to successfully implementing organizational change. Additionally, the notion that a task becomes neglected when perceived as everyone's responsibility highlights the need for clear role definition and accountability in process implementation.

The necessity of well-structured processes in organizations might seem more redundant in times of economic prosperity, where success seems attainable without rigorous procedural frameworks. This perspective, however, overlooks the critical role that processes play during challenging economic periods.

It is in these times that the strength of an organization's process infrastructure becomes a defining factor in its ability to adapt and remain competitive.

Organizational Agility and its Role in Resilience

A solid foundation of clearly defined, well-documented, and consistently followed processes enables organizations to navigate and adapt swiftly in response to market changes, technological advancements, or global uncertainties. This agility is a true competitive advantage, particularly when compared to organizations lacking robust process systems.

However, the reality within organizations is often a mix of well-implemented processes and those that are less integrated or overlooked. This situation calls for a strategic approach from organizational leaders. It's essential for them to continuously evaluate and refine processes, focusing on those that significantly contribute to the organization's success or mitigate substantial risks. This highlights the importance of a culture that values and continually improves process management as a key driver of organizational resilience and success.

Initiating effective change in an organization begins with a comprehensive understanding of the current operational state and the envisioned future state. This understanding transcends mere visual representations or second-hand descriptions of processes. It requires an in-depth, almost intuitive grasp of the internal dynamics of the organization and the external factors influencing it.

In business, the ability to adeptly navigate change often distinguishes companies that thrive from those that merely survive or fade away. The strategic implementation of processes serves as a stabilizing and guiding force, enabling organizations to adapt and evolve effectively in response to internal and external pressures.

Stakeholder Involvement

Effective stakeholder involvement is a cornerstone of successful process building within organizations. The key is to engage the appropriate stakeholders at the opportune moments. Overly democratic approaches in process building can lead to delays, diminishing the initiative's effectiveness. Conversely, an inadequate mix of stakeholders can result in a lack of context for navigating change and a lack of organizational buy-in, both of which are critical for successful implementation.

Determining which stakeholders to involve during the initial stages of process creation or modification is a strategic decision. It involves not only seeking input to bridge gaps in expertise and gather comprehensive feedback but also understanding the social and power dynamics within the organization.

The involvement of leaders who possess relevant knowledge and the trust and respect of their teams is vital. Their buy-in is essential, and this extends beyond just holding the right titles. The perception of change as a collaborative and well-considered effort significantly impacts its acceptance and integration within the organization. If stakeholders perceive the change as a top-down imposition or sense a division within the organization, the likelihood of successful implementation decreases considerably.

Thus, a balanced approach to stakeholder involvement is essential, one that respects the intricate dynamics of the organization while ensuring that all necessary perspectives and expertise are included in the process-building phase.

Effective processes function as guardrails, providing structure while simultaneously granting employees the flexibility to engage in creative problem-solving, invest in outcomes, and contribute value to the organization. Striking the right balance in process structuring is key. While it is important to maintain consistency in customer experiences, overly rigid processes can reduce tasks to mere box-checking exercises, which often yield suboptimal outcomes.

Processes that become overly mechanical can lead to a loss of emotional engagement among employees, diminishing their commitment to delivering optimal outcomes. This disengagement can result in significant consequences, such as high employee turnover, recruitment challenges, a decline in customer satisfaction, and increased operational costs. Additionally, excessively stringent processes can stifle the unique contributions of individuals, leading to a monotonous and less innovative organizational culture.

It is vital to design processes that are not only clear and structured but also allow enough flexibility for individual expression and adaptation to changing circumstances. This approach fosters a dynamic, engaged, and innovative work environment, driving both employee satisfaction and organizational success.

Technology Paves The Way

The proper integration of technology and tools is pivotal in process development and implementation. The selection of these tools should align closely with the specific needs and objectives of the process being developed.

It's also important to acknowledge that processes are dynamic entities that evolve, responding to changes within the organization and its external environment. Therefore, the technology adopted should not only address current needs but also possess the flexibility to adapt to future modifications and expansions of the process. This foresight in tool selection is crucial to ensure that the technology continues to add value and does not become a hindrance as organizational needs evolve.

Additionally, compatibility between the organization's culture and the technology provider is fundamental. The relationship with the provider and the ease of integrating their tools into the organizational ecosystem plays a significant role in the successful implementation and longevity of the process changes. A strong alignment between the organization's values, culture, and the technology provider ensures a more seamless and effective adoption of the new processes.

Bringing it Together with RocketDocs

In summary, careful consideration of technology and tools is essential in process development. The chosen technology should not only meet the current needs of the organization but also be adaptable to future changes while aligning with the organization's culture and values for a successful and sustainable implementation.

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In conclusion, reflecting on the essence of process building, it is apt to recall a quote by Carey Lohrenz: "Most people don't want to be part of the process, they just want to be part of the outcome. But the process is where you figure out who is worth being part of the outcome." This encapsulates the importance of engaging in and valuing the process itself, as it is through this journey that the true contributors to success are identified and nurtured.