Freed Enhances Rollout, Use and Adoption of Client's New Workflow Automation System



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Introduction

When a health plan's IT applications team needed to roll out a much-needed workflow automation tool to 75 marketing department staff members after prior setbacks, it engaged Freed Associates (Freed) to lead a revitalized, adoption-focused project.

The IT applications team regularly supports the marketing department. The team had previously introduced the workflow automation tool to others in marketing, but unfortunately, this earlier work had not gone well. Burdened with a difficult-to-learn user interface and workflows that didn't match their jobs, many marketing staff members either didn't use the tool or used it incorrectly. Marketing managers didn't believe the tool facilitated their employees' work and thus didn't recommend it or use the tool's reporting features to drive their decisions.

Constrained by a lack of internal resources and faced with an aggressive rollout timeline, the IT applications team turned to Freed to lead this critical initiative and help improve the team's implementation approach and methodology.

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Approach

Freed and the client collaboratively worked to plan the implementation and ensure that the pitfalls of past rollouts of this workflow automation tool would not be repeated. This new approach focused on employing best-practice configuration and design processes, delivering effective end-user training and providing extensive project communications to achieve technology adoption goals.

Freed led the following aspects of the new approach, which proved critical to success at the launch of the service:

1. **Planned a phased rollout of the tool** beginning with a basic workflow for a subset of the target users.

2. **Led a collaborative design process**, including five days of design sessions and multiple document reviews, to gather business requirements and align future process and automation tool workflows. More than 15 directors, managers and staff members from each primary marketing team (editorial, design, social media, etc.) were involved in this work.

3. **Developed an iterative series of technical specifications**, including the data needed for management reporting, based on input from the client's business partners, key leaders and systems team.

4. **Developed a comprehensive, multi-tier staff and manager training program** that included curriculum, materials and defined modules (ultimately, delivering 25 days of training).

5. **Engaged regularly with the marketing department's senior leadership**, including the vice president and directors, to understand their priorities, obtain guidance, and ensure active project support.

6. **Delivered outcomes-focused project planning and management**, including heavy emphasis on dependency management and end-user communications.

7. **Partnered with IT applications team members**, including development of tailored tools and methodologies to address internal client's needs, and transition to operations.

Results and Conclusion

Ultimately, the rollout of the workflow automation tool was an unqualified success, with leaders from both IT applications and marketing applauding the results. Configuration of the tool and end-user training were completed on schedule, and feedback from managers and end-users after trainings was positive with user adoption far exceeding prior rollouts of this tool.

With the new workflow automation tool, marketing staff members now have greater visibility on the status of materials in process of development, including who is doing what and when, and what is coming next. Marketing leaders now have critical information about the type, volume and production time of marketing materials being

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created. At a time of ongoing cost containment, the marketing leaders are much better-positioned to make the decisions needed to optimize their operations.

Freed facilitated this successful, large-scale implementation by providing initiative leadership, best-practice workflow design approaches, and an effective end-user training program. This win enhanced the reputation of the IT applications team and helped improve its long-term implementation capabilities.

Testimonial

“In a highly collaborative environment, Freed delivered an approach, methodology and toolkit for the engagement of multiple teams within a large department coming together to align on complex workflows. I am confident that our internal teams can replicate this methodology and use it to scale and successfully execute future implementations of this size.” – Client

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