



## Process Standardization: How Much is Too Much?

Michael Cinquino (00:00)

Welcome everyone to Ascendle Unscripted. Today we're going to be speaking about Process Standardization: How Much is Too Much? We have Susannah Mitchell, Vice President of Operations at Ascendle, a long time Ascendle Unscripted guest. And we have a new guest, Sally Punch, who is Senior Product Operations Manager at Tracelink. Welcome Sally, welcome Susannah.

Susannah Mitchell (00:23)

Thank you, Michael.

Sally Punch (00:25)

Yeah, thanks for having me.

Michael Cinquino (00:27)

So how best to kick this one off? Where do we start?

Susannah Mitchell (00:34)

So I think the theme we're going to be exploring today, how much is too much process, really exists at every level of the organization. But I think perhaps we can start off kind of generally talking about process standardization. What are the general benefits of it and what are the drawbacks? I think the benefits are really clear to folks. Enhanced efficiency, better data, better able to scale, you know. Less reliance on ad hoc processes and more ability to kind of move people around within the organization without causing a lot of churn because everybody knows how things are supposed to be done. But I think what folks don't often think about is the drawbacks to too much standardization. And I'd love if we can start by exploring those a little bit.

Michael Cinquino (01:33)

Sally, if there was like one or two top ones, what would you say those drawbacks would be?

Sally Punch (01:42)

Yeah, so I think when you have too much standardization, what that sort of shows itself as is very, very sort of rigid guidelines for teams. And so when you have these rigid guidelines, it stifles independent creativity. It makes it so that what we see a lot is that teams don't have a very good understanding of why they're building what they're building. They're kind of just going through the motions because that feels like the right thing to do. And we see that it tends to make it so that people are sort of following things by the book and they're

not really thinking creatively about why are they doing it. And it can take up way more time than they need to. I mean, if you have a checklist of 10 things, really only two of those things are important, then why would we go through the 10 things? Why not just check off the two things?

Michael Cinquino (02:46)

So sounds like, well, of course, too much is too much. Could you go a little bit deeper on how you know when it's too much? I think you touched on it a little bit there at the end, but is there a set of standards or some questions that you might ask to understand when it's going from enough to too much?

Sally Punch (03:03)

Yeah, so you can see when standardization sort of becomes too much when teams are really just sort of running things by the book, sort of doing things without thinking about it, sort of being sort of robots in their day to life, Just not thinking critically about the work that they're doing and why they're doing it. And you can see that come up when it can be something as much as: but it's clear this process always takes us four hours and nobody's thinking about, could this process take away less time? What are you doing? Why do you have 75 people on this call when it could be 10? I feel like you start to see sort of a lack of ownership and a lack of creativity in the daily work.

Michael Cinquino (03:59)

Susannah I see you nodding. Do you agree with that?

Susannah Mitchell (04:03)

Yeah, I do. I think Sally's hitting on a really important nugget here with when to know it's too much standardization. And it's that erosion of critical thinking, I think, is what Sally's pointing out here. It makes me think of an example that I've seen at a company where we spent a lot of time standardizing a release process, which sounds really good, right?

So you have the same set of tasks, do it every time you release some functionality to the market, nothing gets missed. And of course that's needed. But what we found was the process that existed was huge. It was like 76 or 77 items that they would go through and make sure they did every time. But not all of those releases were the same. They didn't need the same thing. And it was very rigid. And so what happened was because it just became a checkbox activity, the critical thinking was removed. And then things were getting missed because they weren't on the list to begin with. So yes, you need some standards, but what you really need is a framework by which you can ask the question every time, what on this list do we need? What doesn't apply? And what is it missing? And I think that level of maturity and standardization is really helpful. But when it's just checkbox, check, check, you can sometimes just get into what Sally was describing, this sort of robotic following of a plan that over time erodes people even asking the question about what is it that we need to do.

Sally Punch (05:49)

Yeah, it's like you almost turn it into a status reporting activity instead of a deployment. It's like, can I say that I did this? Yes. Can I say that I'm on step 30 of 75? Yes. But they're not really thinking about what it means to release something into the market.

Michael Cinquino (06:03)

What does it mean? love the question. What does it mean? Before we answer that, I had one question about cadence. So how frequently should one check in? You know, Susannah you laid out this framework. How frequently or who should be checking in to make sure that you don't go into box checking, you don't go into what Sally just laid out. Is there an average cadence? Does it vary?

Susannah Mitchell (06:29)

Yeah, so I'm going to answer with my favorite words. It depends. So it depends on what you're bringing to market, and it depends on the needs of that particular effort. What does the organization need to do? What does the product need? What are the steps? What's the alignment needed? So in terms of the cadence, it really does depend on the maturity of the product itself.

Is this just a functionality release, is this a brand new bringing to market of a whole product, those things look very different. So the cadence is, it depends. It depends on the need and the level of communication needed to meet those needs. You also asked who, which I think is a really important part of this conversation. When you're introducing standardization, who is a big piece of that puzzle because you can't introduce standardization without somebody, resources, time, allocation to manage the standardization itself. It can't just be go read this and everybody follow it. And if somebody needs to be that champion. And so when it comes to releases, oftentimes that's product operations or someone on the product team that manages that communication, because they're the ones that hold ownership over ultimately getting that product into the market. So for the who, it's often someone in the product realm or mature organizations, somebody in product operation that drives those conversations on the correct cadence.

Sally Punch (08:17)

Yeah, that's a great point. We do a lot of change management, the product operations team here at Tracelink. And one of the sort of, part of our process for doing the change management is identifying who are the people who are going to be the champions. Because we're not necessarily responsible for ensuring that over 400 people are following the standardization that we've set. But we are responsible for ensuring that the champions of that change, and depending on the change, could be all sorts of different people. It's at the team level, it's at the org level, just really cross-functionally can be anybody. But you need to identify who they are, and those are the people who you really need to have the conversations with. Make sure that you understand if there's going to be any tension with the standardization in their daily process, because it is like a spider web.

The more you have, the more it webs out, the more implications there are for everybody who's involved. And so you really have to make sure that those champions know what they're doing and understand why the change is happening and then can sort of filter that down through their teams.

Michael Cinquino (09:24)

Sally you brought us right to that why question, the meaning behind it. Because it's my understanding, from time to time, or maybe all the time, the 'why' can get lost the meaning behind what one is doing can get lost. In the realm of standardization, how does that play into things? How does it get communicated?

Sally Punch (09:48)

Yeah, it's like I said, we sort of start by gathering if a change needs to happen, if there's some sort of standardization that needs to be put in place. What we tend to do is start with really trying to understand why. People love to tell you what their solution is before they tell you what the problem is. And so about half of my job is saying, okay, you want X, Y, Z, but why do you want that? What's the sort of problem that we're solving here?

And sometimes XYZ is the answer, but sometimes people aren't really seeing the impact that it might have three doors down. So what we do is we meet with the people who are requesting the change or the standardization. Sometimes it's us, we see problems. Sometimes it's a product owner, they might see problems on their team. Sometimes it comes from the vice president or the president.

Really understanding the why and understanding is this a problem that's happening right now? It needs to be temporary. Is this a problem that needs to be company wide that we need to ensure that going forward every single type of team is impacted by this? And then those answers need to be then sort of rewritten in a way that everybody within the organization can understand. So we do a lot of translating.

And so we're sort of translating what leadership might want or what one PO might want and making sure, sort of running it through the gambit to make sure that it works for everybody and then translating it so that every single person at every single level can understand how it impacts them, why they need to do it and how they're either going to benefit or how they're going to need to shift their thinking a little bit in order to make it happen. Because if people don't understand why, then they're never going to be able to understand what needs what. They're never going to be able to understand what the work is to sort of satisfy the requirements.

Michael Cinquino (11:48)

Susannah, can you talk about or lend some insights to what Sally was just speaking of as it relates to the team or the organizational level and how those channels might differ?

Susannah Mitchell (12:00)

Sure, think while it might seem different at the team level and organization level, it really comes down to the same thing that Sally was talking about, it's making sure everybody understands the why. When you're introducing process, whether that be at the Scrum team level and the software development lifecycle or at the organization level, the why is so critical because it is a change management activity every time. Whether it's a tiny change that you're introducing because you want everybody to sign onto a meeting three minutes before it starts so that you can have more effective meetings or whether it's a big change, like you have your requests for funding in by a certain date in a certain format. All of those asks require change. They require change in behavior, they require change in planning, they require change in how somebody might organize their work and their day. So making sure to lead with the 'why' is incredibly important because for effective change management it can't be dictatorial. It has to be something that everybody understands and maybe is not fully on board with but at least understands and commits to in order to be effective.

Michael Cinquino (13:26)

Got it. Sally, I see you nodding there.

Sally Punch (13:30)

Yeah, when you said that you really can't dictate that the change happens without them knowing why. Just thinking of all the times where you get this massive sort of template or spreadsheet or workflow and it's just do it this way from now on and you're not, if you don't understand the 'why', the benefit of doing it that way then it just becomes really, really daunting in your workload because it's just so much, it can feel like a lot of extra stuff. When we first implemented SAFe agile, one of the most beneficial things that we did was going through the recurring meetings that people had on their calendars to either refactor them so that they met the sort of framework of scaled agile or get rid of them altogether because now agile is, or scaled agile is sort of satisfying those requirements. Because one of the biggest complaints that we had is "this feels like extra meeting. Now I have my team meeting and now I have my art meetings and it just feels like a lot of extra meetings." And if they don't understand that, you can't just say to them, well, this is going to be less meetings in the long run. You have to go through each individual calendar invite and have an understanding of this doesn't need to happen because it's satisfied here, that doesn't need to happen because it's satisfied here. Doing something like that really helps people understand the 'why', why we're having all of these new meeting invites. It's not just adding to your workload in the long run. It's supposed to mellow out the amount of meetings that you have so that they're more poignant.

Michael Cinquino (15:15)

But it does sound that there is an uptick on the front end of contact time.

Sally Punch (15:21)

Yeah, definitely. And if you don't do the work to make sure that you're getting the right benefits, then the contact time could be extra-long because people end up having the

same conversations, but maybe with different people when they could just be consolidated.

Susannah Mitchell (15:38)

I'd love to jump in on that, Michael, if I can. So something that Sally just mentioned, experiencing in their own agile transformation, is something we see reliably with every client that we help with an agile transformation. And that is resistance to the processes upfront because it feels like more overhead. Or resistance to the, specifically the meeting cadence, because it feels like a lot of things on the calendar. But then as the transformations mature and people find value in those fairly hardened meeting sets at this point, we're not reinventing the wheel here, that tends to die down. So we ask people to suspend their disbelief in the process change and let it happen for a while and then revisit it later within the context of, you know, looking at it and seeing is there anything that we can improve, retrofitting it, if you will, and then iteratively improving it from there. So I think that's kind of an important concept when we are talking about rolling out standardization is sometimes you have to ask for that grace and ask people to try it before it can truly be evaluated for effectiveness.

Michael Cinquino (17:07)

Do you think it's important to set an expectation that things might not go perfectly?

Susannah Mitchell (17:13)

Yes, absolutely. It's something we do and Sally, I assume you guys did it. You know, I can't remember the name of that chart, but sort of that storming, forming, norming, and performing. Sometimes it takes a lot of extra effort to kind of storm on it and figure it out and get it right for your organization.

You know, a framework is just that. It's a framework. It's not a get in there, do it exactly this way for every organization and it's going to be perfect. It needs to be fit into the organization based on their particular politics, makeup, organization chart, talent, needs as company, right? So some companies are highly regulated their products, so they might need to be really rigorous in process, where others might be just busting into new market and making headway, because of their speed to it those two things are very different. And so the process by which the teams reform and the process by which the organization does business within their product world is very different. So it's not a one size fits all.

Sally Punch (18:29)

Yeah, Tracelink is a very highly regulated software. Our customers are in the pharmaceutical supply chain. Naturally, all of the software and how it came to be needs to be very highly tracked. Anytime we make a change, we have to read through all of our SOPs, standard operating procedures. They're at the company level. They're available to all of our customers, we're audited based off whether or not we follow them. So people know that the SOP is sort of the truth of everything that we do. And so especially if there's a change that impacts an SOP, that's something that we really need to make sure that

people know that that's happening because it's the bread and butter of the company. We need to make sure that we're being compliant and safe for our customers.

Michael Cinquino (19:34)

It sounds like flexibility and consistency are equal and they both need to be celebrated. Would you agree with that? If so, why?

Sally Punch (19:39)

I think they are equal. I think that it depends on the company you're at and sort of what the culture expects. I think that there's probably some startups out there who just are sort of in the wild west and trying to get this great idea to market and they might have a little more flexibility. But when you are sort of maybe in a little bit of more mature product suite, if you're in a compliant environment, you might need a little bit more of a rigid standardization. I think that you kind of have to decide where on the spectrum you want to be and then think about that as you're making changes. The other thing I see a lot is if you have to document pages and pages and pages of your process, it's probably too rigid.

Michael Cinquino (20:35)

We talked about frameworks, guidelines, things that can go wrong and balance. This is all to the point of a benefit though, actually more than a couple of benefits of implementing something like this. And when you're hitting it just right, not too much, not too little. So the question I would ask now is what are the benefits of not too much, but just enough?

Susannah Mitchell (21:00)

Sure, I'll tackle that one. I think the primary benefit of standardization of process, regardless of the level within the organization, is enhanced efficiency. The reason you have standards is so you can reduce churn around how you're going to do something. And that helps both when people are coming up to speed. Frankly, misalignment is really expensive, so if you can reduce the churn around alignment of how we're going to do it. You can instead then focus that cognitive energy on what it is you're doing and building that value within the product itself. We see this all the time at our clients once they can get, you know, kind of working within a model that fits their organization, they can refocus and do a better job within the context of building the product.

Michael Cinquino (22:00)

That sounds like it lends itself to scalability. Sally, taking the how out of the equation, it seems like that can open some doors.

Sally Punch (22:06)

Yeah, for sure. Once people sort of see that benefit of having a streamlined process, that process can scale to multiple product teams, multiple product areas. I know, Susannah, you mentioned it can be vital for onboarding, but also it can be vital for any sort of shifting in teams that needs to happen. If I move from team A to team B and they're running the exact same processes, then I can easily sort of just jump in and understand. And I think



the most important sort of benefit that you receive when you are scaling like that is that it lends itself to sort of a streamlined communication across teams and across cross-functional, or I should say, around cross-functional teams. If Scrum team A, B, and C are running the same, doing the same processes in the same way, that makes things either easier for the documentation team, for the marketing team, for services, training, sales. Everybody sort of gets the same type of information and can ask the same types of questions from the teams because the processes are the same. You're not just sort of trying to read requirements docs from one team and click through a UI in another team to sort of get the same questions. All of your questions are answered in a very similar way. You have a very good understanding of where to look.

Michael Cinquino (23:54)

Those two elements of enhanced efficiency and scalability, does that mean that metrics are of higher quality or cleaner, to use a different kind of phrase, like leaner, cleaner?

Susannah Mitchell (24:09)

Yeah, absolutely. I think that that's one of the lesser talked about benefits. Every organization right now is focusing on OKRs and KPIs and better metrics. A lot of companies are sitting on a bunch of data and they want to do something with it. And that goes for our PMOs as well. We want to get really good data out of the teams, good data out of the product performances and do something with that.

By standardizing processes, what you're doing is making sure you're not getting apples and oranges, right? Looking across all teams, knowing that they're essentially operating the same way, you know, within a framework, not like robots, as we talked about before, means that you're going to get similar metrics out of those teams and can start doing that over time comparison and learning from it and really being better at being data driven when it comes to your processes, what's working, what isn't. That applies at the organization level too. One of the more challenging things to do is compare performance of products that aren't measured the same way. So if an organization has two or three products out in the market, streamlining the process by which you request, fund, build, put into market and measure those products. Even if the measurement is different, streamlining that means you get more predictably on cadence measurements. You can get into a better practice of looking at that data and making decisions based on it. So across the board, at the team level and at the organization level, having solid, streamlined processes absolutely helps with data. And I think that that's something that a lot of companies care a lot about right now.

Sally Punch (26:11)

When we're defining those processes, a lot of the times what I think people really like to do, and I see a lot of leadership like this, to ensure that the processes have the metrics that you want to be able to pull built into it. We don't want to add that as sort of an extra tracking mechanism that people at any level need to do. The process itself has the sort of metrics that we've decided on that matter to us the most, if that's built into the product or



the process or whatever it is, at whatever level you're building it at, then the people who are following the process don't necessarily even need to pay attention to the metrics because it's built in to what they're doing. It's built into their tool set. It's built into their product.

But people who do care about it, the Susannahs of the world, can easily pull that same metric. And it's from all of the teams. And we know that we can trust that data if it's just something that is naturally built in.

Susannah Mitchell (27:15)

There's another piece to the data side of it as well, which a good product process when we're zooming out to the organization level and looking across our software development lifecycle. A good product process will force the setup of metrics and goals upfront, whereas a lot of times in organizations that are moving really fast or that don't have that forcing function, is this success is harder to determine at the end because a product process that enforces that doesn't exist. So the goals never get truly set or they exist just within, you know, the purview of that product manager. So again, really good process standardization around how work flows from idea to customer and even measurement beyond can very much enhance on the data and measurement side because you make sure that that's getting set and measured and then talked about as part of that process.

Sally Punch (28:23)

Yeah, if you don't set a baseline, then what are you even measuring against? You're just shooting in the dark.

Susannah Mitchell (28:27)

Right.

Michael Cinquino (28:28)

I feel like this is all channeling into and support of a decision-making process. Do you have any examples of how what you and Sally have laid out so far has positively impacted decisions in some way?

Susannah Mitchell (28:45)

Absolutely. And I think it goes back to that concept of removing the churn of how you're going to be doing something and instead focusing on what it is you're doing. An example I've seen is because of the set process of creating KPIs for the product that happened early on in that product life cycle and then post launch measuring on cadence every month and then the process also called for pulling leadership together and reviewing those metrics and asking questions. Doing that activity led to a situation where a product wasn't performing against the goals. We had a good deep discussion as to why a portion of the organization that wasn't as engaged at that time realized, you know what, we have more to do on our end and came up with some ideas and activities that they could do to enhance, in this case, the sale of the new product, put into place some incentives for their

team. And then two months later, when we got back together to review it, we were actually ahead of the target.

So clear example of just the process of setting goals, getting together to talk about them and having a strong, well-led conversation about what that means and what has to happen and taking the actions out of it, all of which were part of the process, absolutely led to enhanced product performance in the market because what it really led to was “What's the conversation we need to be having? What are the changes we need to make? And what do we take from this conversation today to fix the problem at hand, which the data indicated.”

Michael Cinquino (30:33)

So do you have a decision impact example from your end?

Sally Punch (30:37)

Yeah, so one of the things that I love about agile is that it gives teams a chance to pivot or persevere. So every two weeks, you do a retrospective and you do a review and you look at what you've done and you say what worked and what didn't work. And that right there is a process where telling teams, okay, you're going to meet, you're going to do this thing, here's your sort of agenda, but allowing the teams to give their opinions, talk about their experiences. It humanizes them and it also allows them to see what everyone else on their team is doing and what they're thinking. And that helps people to make informed decisions and be responsive to what needs to happen on a biweekly basis. So we can, even if we lose two weeks of work, we didn't just lose two months of work.

We can decide this is working, we're doing a great job, we need to continue what we're doing. Or we need to pivot a little bit, this isn't quite working, this product isn't exactly going where we thought it was, let's try something else. So I think by doing that, it allows teams that sort of ownership and accountability to make their own decisions within their team as to what needs to happen next. And by understanding what they're building and why they're building it, they can easily make those decisions because they understand what the customer's needs are and if what they're doing didn't meet those customer needs exactly, it gives them the space. That process, that framework gives them the space to experiment and sort of make decisions about what they're going to be doing for their next couple of weeks.

Michael Cinquino (32:25)

Sally, thank you for that. We're going to go back to Susannah and then back to you, Sally. This is the point where we get to leave a takeaway, a real takeaway, and we always strive on Ascendil Unscripted to impart something that is actionable right now. So, Susannah, I'll let you weigh in first and then Sally, you can take us home.

Susannah Mitchell (32:48)

I think the thing to do right now today, if you're struggling with this concept of how much standardization is too much is to stop and assess: is there churn in my organization that can be solved via some standardization? Are we having alignment issues both within the development departments or across departments? Are we trying to grow quickly and therefore need to not be reinventing the wheel in each area? Are we getting too big for ad hoc processes, if you will, because it's taking too much time to reorient for each? Do we have too much data coming in and nobody has time to manage it and we kind of need that capacity? Or do we have scaling on the horizon? So we need to get kind of solid first. So asking questions such as this and really looking to see, can standardization remove some of the churn so we can better focus, I think, is step one. And then once you've asked that question, if you determine you do need some better level of standardization, you're maturing beyond that noisy market breaker into a well-oiled machine, the next decision is to invest in the process. So I think a key takeaway is process doesn't just create itself. The organization does not start following process itself. And it takes human capital and financial capital to roll out change, manage, and then continue to champion process at the organization because just like introducing standardization of process takes time and energy, maintaining it does as well because as the organization evolves, so does the process. So those would be my two takeaways. Really look to see, is this something you need? Do you have the warning signs? And then two, make sure you realize it's an investment.

Sally Punch (35:00)

Yeah, I think that's such a great point. And I think once you decide to invest, if you decide you're feeling really inspired to make change, to do some standardization, I think it's really important to make sure that you're doing gradual implementation of change. I think sweeping the rug out from an entire group of people is going to be really jarring. You don't want to change everything at once. I think you sort of want to decide what is going to benefit us the most at this time. It's really easy to sort of let the idea of changing one thing just grow and grow and grow until you've rewritten your entire SDLC. I think it's try to stay focused as much as you can on the original why and the original problem that you're trying to solve so that you can sort of do it one problem at a time. Allow teams to see the benefit one problem at a time. I know that ideas are going to come from it, especially when you start thinking about what tooling changes can we do? What processing changes can we do? Keep your backlog, treat yourself like an agile team, and just try to focus on one thing at a time. Otherwise, you're going to get fatigue just trying to make changes and sort of you don't need to rewrite the whole playbook in one day. You can do it gradually.

Michael Cinquino (36:36)

Sally, thank you very much for that and thanks for joining us on your first episode of Ascendle Unscripted.

Sally Punch (36:41)

Thank you. Thank you for having me. It's been really fun.

Michael Cinquino (36:43)

Pleasure. Susannah, always great to sit across from you.

Susannah Mitchell (36:53)

Thank you, Michael.