Developing an engagement strategy

The engagement driven approach puts engagement at the heart of every stage of an improvement project. Process players and users are not just consulted they are directly involved in the diagnosis, design, implementation and sustaining of improvement. Through this, they connect with others and build relationships which last beyond the project.

Though engagement is organic and evolves it must be carefully managed. Key to running an engagement driven project is, therefore, the development of an engagement strategy. The strategy focuses on the what, who, why, where and when of engagement, and articulates how thoughts, ideas and opinions will be gathered, how ideas and solutions will be validated and how changes will be implemented.

In one sense, every contact with a process player or user is an opportunity for engagement but the strategy sets out the formal engagement practices that will be used within the project. These can include:

- workshops
- drop-in sessions
- team meetings
- display
- observation-led conversations
- surveys.

However, this list is not exhaustive.

The engagement practices you adopt will depend on a range of different factors, including:

- How many process players and users there are
- What stage of the project you are in
- What you want to achieve
- How detailed you need the input to be
- Where the process players and users are physically located
- How much time is available to engage
- How much resource is available to support the engagement
- How available the process players and users are. Do they have customer-facing roles? Do they work shifts? Are there operational constraints on their time?
- How confident the process players are in articulating their views.

Hints and tips

- Involve the sponsor and process owner in understanding the opportunities and constraints relating to engagement in your organisation.
- Evaluate the different engagement practices available against these constraints.
- Be clear about what you want to achieve.
- Use your core team and emerging wider team (including volunteer partners where appropriate) to find out as much as you can about the process players and users with whom you will be engaging - ‘know your audience’.
- Review your engagement strategy continually and be prepared to revise it in the light of what is working and what isn't.