



**PLOTBOX**

Serving Better Together.

# People, Process, Technology

A balanced approach  
to digital change for  
deathcare providers.

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## Finding balance in digital change.

Rapid technological adoption and changing consumer expectations mean that today, embracing digital change is no longer a nice-to-have for deathcare service providers - it's now an imperative in order to remain responsive to the evolving needs of families seeking end-of-life services.

Digital change means organizational change, and at the heart of this transformative journey lies the balance between People, Process and Technology.

In this eBook, we explore the PPT framework, a holistic approach that we can use to address the multifaceted nature of digital transformation, along with practical applications to help ensure your journey of digital change is a success.

In this eBook we will cover:

- **The PPT Framework**
- **The role of people in digital transformation**
- **Processes, workflows and digital change**
- **Exploring technology solutions**
- **The Balance of People, Process and Technology**

# 1 | An introduction to the PPT Framework.

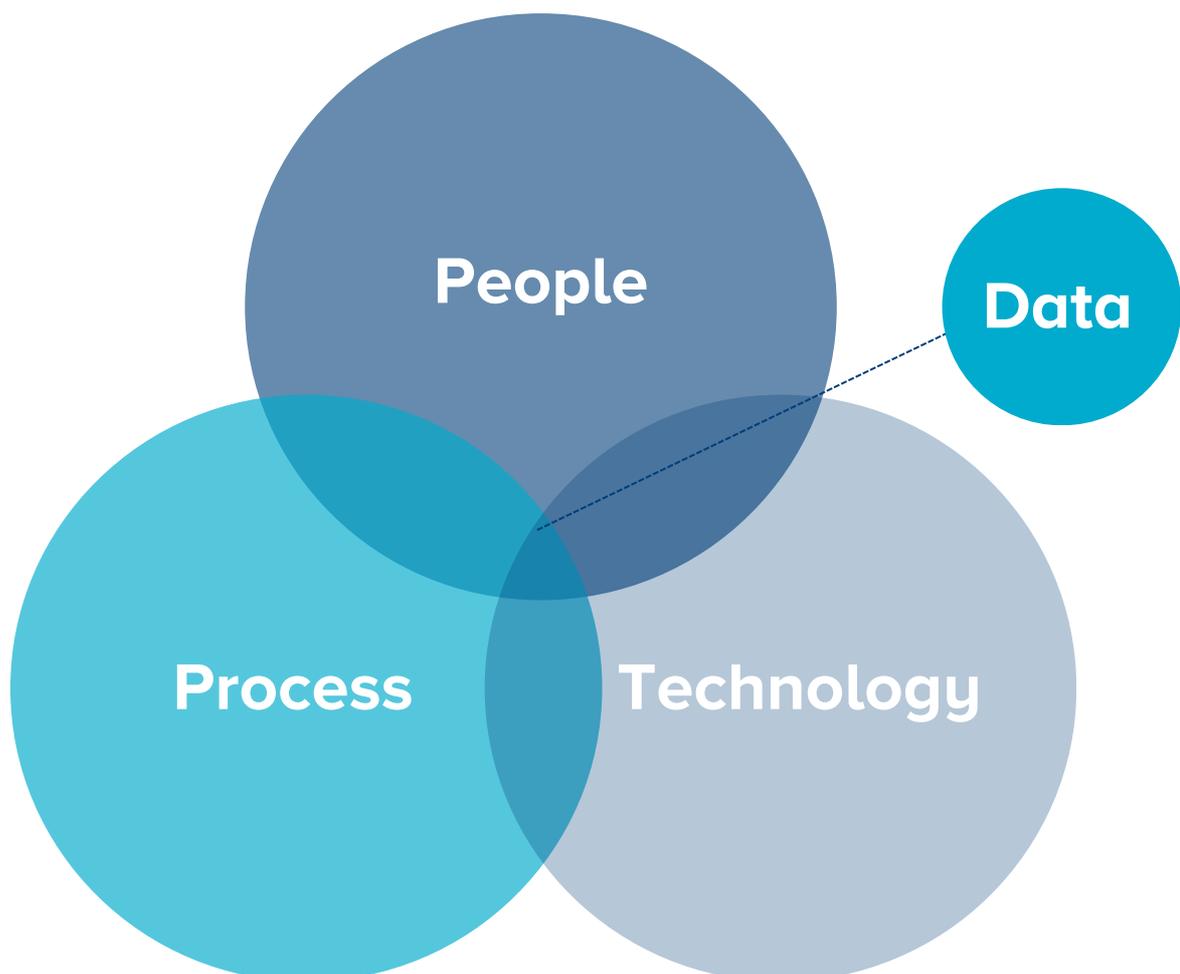
The People, Process, Technology Framework - also known as the 'Golden triangle', was conceived in the 1960s as a model applied to operational efficiencies and organizational change, gaining renewed popularity in the 1990s when widely adopted within the information security industry, championed by public interest technologist Bruce Schneier.

Today, it's used by many organizations within the context of change management and specifically, in the IT sector with regards to information technology management.

At its heart, the framework suggests that for organizational change to be successful, each of the three elements must be in balance.

In terms of digital transformation, for example, the introduction of new technology itself won't solve the challenges presented - it will only be as effective as the processes implemented around it and the people using it.

For that, the technology must fit the organization's needs, with the right processes in place and the right people with the right skills.



# 1 | An introduction to the PPT Framework cont.

## The 3-legged stool

The metaphor of the "3-Legged Stool" is often used to illustrate the concept of balance and interdependence of People, Process and Technology.

Imagine a three-legged stool. Each leg represents one of the core components of the PPT framework:

### People

The first leg represents the people within the organization—the leaders, staff, and stakeholders.

Just as this leg provides stability to the stool, people provide the foundation for successful transformation. Their skills, attitudes, and willingness to adapt are driving forces that influence the entire process.

### Process

The second leg signifies the processes and workflows that guide how change is carried out and implemented.

These processes define the organization's structures and operational efficiency. Like the second leg of a stool, processes provide balance. When processes are streamlined and optimized, they create a stable platform for implementing new technology and ensuring that it integrates seamlessly into the organization's operations.

### Technology

The third leg symbolizes the technological tools and solutions that enable innovation and advancement and elevates an organization's capabilities. However, like a stool without the other legs, technology alone can't provide stability. It requires the support of both people and processes to function effectively and achieve the desired outcomes.

And before we stretch the metaphor too far - you can see where this is headed - if one leg is shorter or weaker than the others, the stool becomes unbalanced and unstable. Similarly, within the PPT framework, neglecting one component over the others can lead to inefficiencies and disruption - therefore achieving balance among People, Process, and Technology is crucial for maintaining stability and ensuring successful transformation.

It is worth noting that the PPT framework continues to evolve and move through iterations as it articulates and reflects changes in how we approach organizational change

We might for example consider data as a fourth pillar of change - where data is pivotal to organizational decision-making around people, process and technology. (ref. [Embracing the future: Harnessing People, Process and Technology in a Post-pandemic World](#), M. Edwards, Britannic, Sep 21)

For now, let's focus on the 3 key elements of the framework.



## 2 | The role of people.

**Technology may enable change, but the success of that change ultimately depends upon whether employees embrace it or resist it, which is why you should always be thinking about ‘the people implications’ of what you're trying to drive.**

In the realm of digital transformation, the human factor is the linchpin that determines the success of any change initiative. While technology provides the tools, it's the people at every level of the organization, from CEOs, senior management, admin teams - who provide the vision, energy, and expertise to drive meaningful transformation.

### Leading by Example

Senior leadership teams aren't just decision-makers; they're champions of change. Their enthusiasm for the adoption of cemetery management software and the benefits it brings can inspire similar enthusiasm across the organization. By showing a genuine commitment to the technology and articulating its potential, leaders can create a ripple effect of excitement.

### Staff Engagement and Buy-In

In creating a sense of ownership and involving staff from all departments early in the process can help to address resistance. By facilitating workshops, open forums, and discussions, you can foster a real sense of ownership. When staff see their perspectives valued and integrated into the transformation strategy, they will feel more invested in its success.

### Addressing Apprehensions

Change of any kind can be daunting, especially when it involves a change in processes and the introduction of new technology. Leaders can create a supportive environment by addressing concerns head-on.

By acknowledging challenges and providing clear explanations about how the implementation will enhance operations, and ultimately help them in their day-to-day working lives, they can alleviate uncertainties.

### Training and Skill Development

Introducing new technology without adequate training can lead to confusion and frustration. Think of our 3-legged stool. Technology itself won't be effective if people don't know how to use it.

Provide comprehensive training programs that cater to individuals with varying levels of technological familiarity. These programs should cover not only how to use the software, but clarity on the rationale behind its adoption.

### Ongoing Support and Resources

It's important to realize that learning is an ongoing process. Providing continuous support through resources, refresher courses, and training collateral can boost staff confidence in using the new software effectively.

### Nurturing a Change Management Mindset

Cultivating adaptability by emphasizing that digital transformation is not a finite event but an ongoing journey.

A change management mindset involves a commitment to continuous adaptation, evolution, and improvement. Encouraging a culture that values learning and embracing change paves the way for sustainable growth.

By fostering a culture where staff feel empowered, supported, heard and knowledgeable, managers can lay the foundation for a successful organizational change.



# 3 | Processes, workflows and change.

**The Process leg of our 'stool' might be characterized as connecting the aspirations of people with the capabilities of technology - and the way in which we can begin to create a roadmap that enhances efficiencies and ensures that the goals we hope to achieve through transformation are realized.**

Processes can be viewed as facilitating the harmonious interaction between people and technology. Let's look at its significance within the context of digital transformation and the customer journey:

It's important to realize right from the outset that your processes will change along with the implementation of any new software system.

And where streamlined processes and smarter organizational workflows are two of the key goals of your digital change - that should be viewed as a good thing.

## Evaluating Current Processes

Before embarking on the implementation of a new cemetery management software solution, it's essential to conduct an audit of your existing processes and workflows - assessing every step of the service journey, identifying bottlenecks, redundancies, and areas ripe for improvement.

Here starts the journey toward optimized processes, laying the groundwork for a strategic transformation that aligns seamlessly with the introduction of digital tools and systems.

## Process Alignment

A key part of the discovery phase of any digital transformation project is process alignment.

During the process alignment phase, you, along with your vendor, should review your current processes and discuss potential changes needed to align them with the new system's capabilities. This is about putting your day-to-day operations into the perspective of the new system, ensuring that you can seamlessly integrate your workflows into the new platform.

In this way, you can work along with your vendor to design workflows that leverage the software's capabilities to their fullest. This includes automating repetitive tasks and creating clear pathways for the flow of information.

## Evaluating process improvement

Where process improvement has been defined as a key delivery goal, it is important to maintain regular check-ins with your vendor throughout your journey to gauge their progress and satisfaction, especially after the process alignment phase.

These post-alignment health checks can help verify if the new processes within the new system align with your previous ones, ensuring you are comfortable with the transition. That involvement from your vendor should not end at the go-live stage, and you should expect support and the monitoring of your processes beyond that point to ensure that any changes are accounted for.

## Process outcomes

In terms of positive outcomes, leveraging digital technologies, should streamline administrative processes, reduce manual intervention, and enhance efficiency. This reengineering of workflows reimagines traditional practices through a digital transformation, and should ultimately aid staff and amplify the value delivered to families and visitors.

# 4 | The right tech in the right way.

From narratives created by Virtual Reality (VR) tours, to Geographic Information Systems (GIS) optimizing space management, to Artificial Intelligence (AI) lending insights to enhance decision-making, these emerging trends provide deathcare service providers with options - new frontiers to explore in order to remain at the forefront of service provision.

## The Right Technology in the Right Way

Broadly speaking, technology incorporates the tools by which your people can carry out their processes more efficiently.

By strategically integrating new technologies, deathcare providers can create new levels of efficiency, insights, and customer service.

And with such a substantial investment, in time, resources and money it's imperative that not only is it the right technology for you at the right time, but that it's implemented in the right way

Technology will never do what you want it to without the right people and the right processes behind it - as we said, technology itself won't solve the challenges presented - it will only be as effective as the processes implemented around it and the people using it.

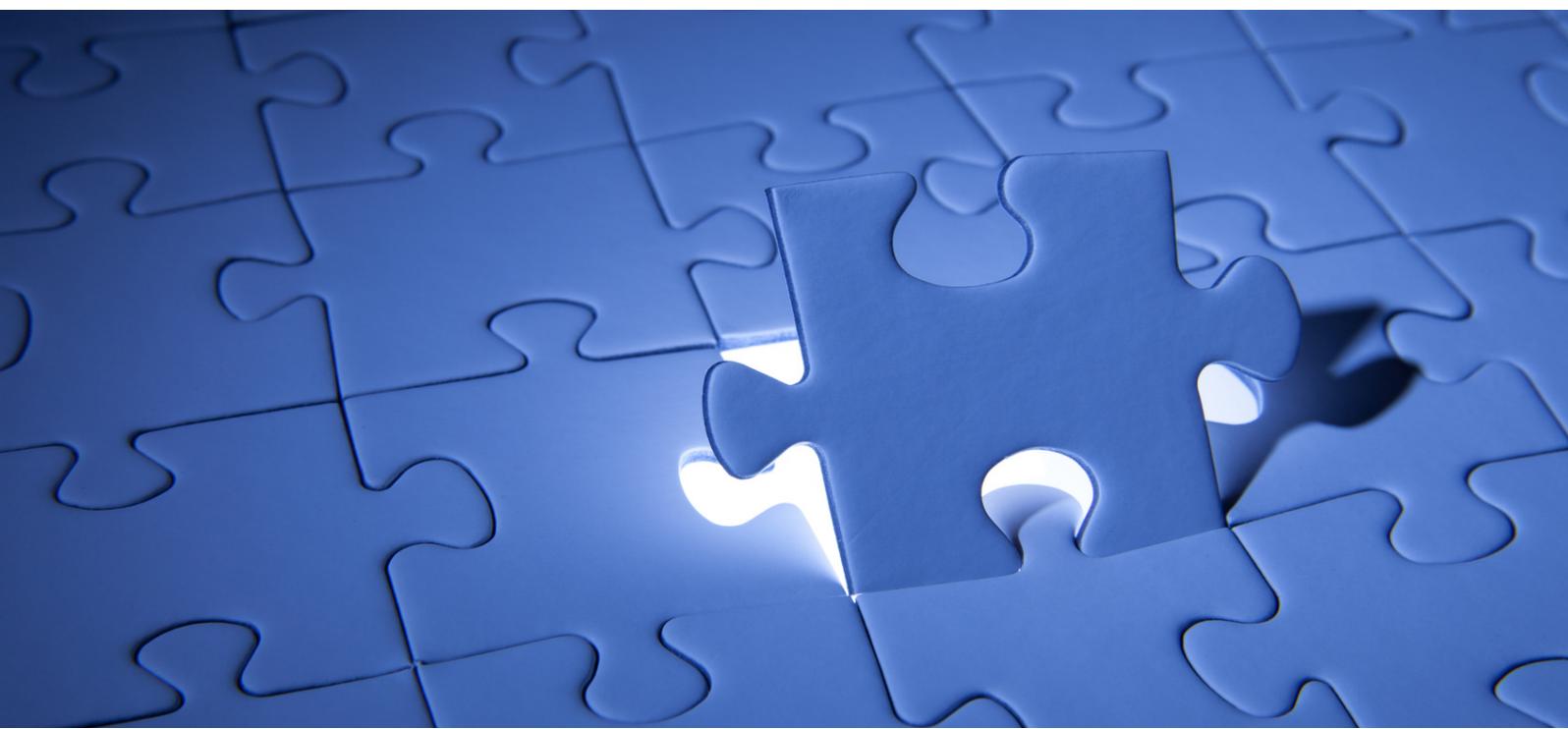
## Ensuring the Right Fit

So how do we ensure it is right for you?

Begin by identifying your organization's strategic goals. What specific challenges will the new technology address? Will it help you to realize your mission? Rather than opting for the latest 'piece of kit', ensure that it's the right fit for your organization.

In this way, your choice of technology solutions should align with your objectives - whether it's enhancing the visitor experience, optimizing operations, increasing efficiencies, preserving legacy, or all of the above. Careful evaluation of available solutions, considering a number of factors such as scalability, usability, and compatibility, will help to ensure a harmonious fusion with your people and processes.

What it needs to provide you with is ultimately down to you, but here are a few considerations:



# 4 | The right tech in the right way cont.

**By no means an exhaustive list, here a few things to think about when considering what tech is right for you in the context of balancing with your people and processes:**

## Functionality

The software should integrate the essential functions of deathcare management, cover key aspects such as digital plot mapping, record-keeping, scheduling, contracts and reporting. Or to put another way, it should do what you need it to do.

## Scalability and future-proofing

Your chosen solution should not only cater to your current needs but also accommodate your future growth.

In this way, the best technologies are those that are scalable and adaptable enough to allow you to move with evolving industry trends and changes in customer expectations.

## User-friendliness

An intuitive and user-friendly interface is vital to ensure that users of varying technical proficiencies can engage with the software effectively.

## Data Security

Given the sensitive nature of the data you hold, robust data security measures are essential to protecting sensitive information.

## Integration

Where you are not opting for an all-in-one solution, you may consider whether your new solution is able to integrate with other systems used by the cemetery, such as accounting software or geographical information systems (GIS).

## Vendor Support

Opting for a reputable vendor with proven experience that provides comprehensive support is essential for troubleshooting, updates, and ongoing support and maintenance is key - and a good reason why the cheapest solution is not always the best.

Remember - you are investing in a partnership.

And a few more considerations...

## Customization

The software should be adaptable to your unique needs, accounting for factors like burial traditions, memorial services, and plot management.

## Accessibility

The technology should facilitate easy access to cemetery information for both staff and visitors, enhancing their overall experience. Just one reason why cloud-based solutions are becoming increasingly popular.

## Training

Comprehensive training programs should be established to ensure that all users are confident in navigating the new technology.

## Budget

Cheapest is rarely best, but cemeteries do need to evaluate the financial implications of adopting and maintaining the technology, factoring in costs for initial implementation, training, and ongoing support.

Again, which is why it is important that teams are engaged and process evaluation is carried out at an early stage.



# 5 | Balancing People, Processes, and Technology.

Digital transformation and the organizational change that it brings should not be viewed unilaterally. The PPT framework underscores the need for balance - or equilibrium - between People, Process, and Technology. Neglecting any one element puts our 3-legged stool at risk of falling over.

Consider for example investing heavily in a new software solution without ensuring that staff members are adequately trained (People) or without reevaluating or adapting existing workflows (Process). The result might be the new technology remaining underutilized, staff feeling overwhelmed, unproductive and disjointed or in effective processes.

So putting all of what we've learned together, let's look at how that might work when implementing a new cemetery software system:

## People

### Stakeholder Involvement

Engage cemetery staff from various departments in the selection and implementation process. Gather insights from administrative, maintenance, and customer service teams to understand their specific needs.

### Change Management

Offer training sessions and workshops to familiarize staff with the new software system - both pre and post implementation. Address concerns and provide ongoing support to ensure a smooth transition.

### User Feedback

Establish channels for staff to provide feedback about the new software system. Regularly gather input to identify any issues or areas for improvement.

## Process

### Process Mapping

Evaluate existing cemetery management processes and identify areas that can be streamlined or automated using the new software. Ensure that workflows are optimized for cross-departmental collaboration.

### Data Migration

Plan and execute a data migration strategy to transfer existing records and data to the new software system. Verify data accuracy and integrity during the migration process.

### Standardization

Implement standardized processes across departments to ensure consistent data entry and usage. Define roles and responsibilities to maintain data integrity.

## Technology

### Software Selection

Choose a cemetery management software system that aligns with the specific needs of the cemetery. Consider features such as digital mapping, record keeping, scheduling, and reporting.

### Future-proofing

Ensure that your new system is scalable and adaptable enough to grow as you do.

### Deployment

Host the software system on a cloud-based infrastructure to enable remote access, scalability, and easy updates. Cloud hosting can also enhance data security and backup capabilities.

## Further reading and resources

For the latest insights from PlotBox, visit our blog page:

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## The PlotBox Resource Hub

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