Second edition

Build better teams

Putting people first in Organizational Design

Craig Willis & Colin Claverie @ Skore Labs

Modern businesses ride the wave of change, not just survive it.

As consumers we have more choice and are better informed than ever. Technology has connected us and made decisions easier and faster.

For most companies this pace of change has increasingly become a challenge. To the extent that those unable to keep above the waves go out of business completely. It is predicted that in the next decade 3/4 of our best-known companies[1] will have been replaced.

We show you how to survive.

People are your most important resource (sorry for the cliché). Why? Only people can effect and sustain change. Only people can adapt and survive. Only people can achieve goals and objectives. Process and technology are merely enablers to help engage and empower people to succeed.

Put people at the heart of your designs and make change a capability not a threat.

1 Source: Prof. Richard Foster, Yale University

Create the future of your organization

Who should read this book?

You are a **Manager or Executive** tasked with delivering strategic change initiatives.

In this book we describe an approach to defining the roles, responsibilities, jobs and key activities for a high performing team. These outputs will be directly aligned with the objectives and goals of the organization. In the process you will define the work required to deliver those goals and an organizational structure that is fit for the purpose.

You are a **Business Transformation professional** engaged in a change program that requires a change to the way teams are structured and how they work.

If you have been involved in any sort of change, or transformation, program you'll be aware of the myriad challenges in delivering high performance and sustainable change. Nothing impacts the success of a change program more than the people most impacted by that change. These people are the employees, team members and champions that must be convinced, trained and supported throughout the transition. This approach puts people at the center, ensuring roles are designed around what needs to be done and staff have a clear purpose and direction.

You are a **HR professional** supporting change programs that require staff development and recruiting.

The output of this approach is a high-level work map describing the key areas of work. An organizational structure showing the reporting lines and teams. And job descriptions for each role identified in the work. With that in hand, you can create development plans for each individual, aligned with the work to be done and the strategic direction of the organization.

You want to learn a proven approach to Organizational Design

This approach is based on our experience on real business transformation projects in some of the world's largest and most successful organizations.

The process in this book can be used to build a business case, plan an implementation, perform gap analysis, identify training needs or simply to provide role descriptions for internal / external recruitment purposes.

Background and pre-requisites

A clear and viable strategy

In this book we have included a step for defining and communicating the strategy for the organization. This has been included here due to the importance of having a clear and viable strategy before embarking on any design. However this is not the focus of this book, and while it is included we recommend that this guidance is the very least a leadership team should invest in when embarking on a transformation program.

From strategy to reality

The focus here is on organizational design, an essential part of any change program. The output of this process perfectly sets the change team up with the right foundation for implementation. As with strategy we provide some guidance and advice on implementation but strongly recommend further research, guidance and assistance before starting the implementation.

Who to involve?

Identify subject matter experts with a broad knowledge or understanding of this area of the business. If this is a completely new area try to identify team members with previous experience at other companies. External consultants can bring valuable insights, best practices and experiences, from similar projects.

We have found it very valuable to run some type of team profiling (e.g. Myers-Briggs, Herrmann Brain Dominance Instrument), especially for larger projects and teams. This helps to ensure a good balance but also to help the team quickly learn the best way to communicate with each other. This is especially important for teams that do not already work together regularly.

Assemble the design team

Depending on the size of the project it may be necessary to divide the organizational design process into multiple streams. In an individual stream we would expect a team size between 6 and 10 subject matter experts, not including facilitators.

It may be necessary to bring other experts in to (some of) the design sessions as required.

Commitment – What makes or break the project

The work involved in designing a new organization is hard but also rewarding.

The team must stick to the steps and avoid the temptation to skip ahead to save time. The approach is based on iterations, reviewing and re-reviewing the work, while adding to it at each phase. As a result it is important that all team members attend most, if not all, the sessions

If team members have performance -related bonuses; it is important that this project is taken into account and not « on top of » the normal workload.

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About the authors

Craig J Willis and Colin Claverie are the authors of this book and the co-founders of Skore Labs Limited.

At Skore Labs Limited we are a small group of experienced change enablers and technology enthusiasts. We have worked on many change programs at organizations of all sizes. Our work has taken us into projects at companies including; Astra-Zeneca, Barclays, Chevron, Novartis, and Nestlé as well as many small to medium sized businesses across North America, Europe, the Middle East and Australasia.

We like to test new ideas and approaches, especially on the most difficult problems. We take what we learn and continuously improve our processes and methodologies. We also develop technology to support and improve the way we work.

What is Skore app?

We make Skore app, a software tool designed for rapid process modelling, to support this approach. Skore app has powerful analytical features that simplify and accelerate some of the most complex parts of these projects. By making the hardest parts of the process easier you can focus on what matters most; keeping the team members engaged throughout in order to deliver a high performance organization.

Skore app is not required to apply the approach described in this book. It does make it easier and faster.

Want to know more?

For more information on anything in this book please do get in contact with us at info@getskore.com. We are always happy to provide advice, guidance and to help support projects.

Getting change wrong

The simplest things can have the largest impact

As a business leader you have two challenges

1. Setting, and communicating, the company's goals and objectives
2. Ensuring you have the right people in the right roles to achieve those goals

This is no simple task. Setting goals and objectives for the next 3 to 5 years is always going to be a gamble. Extensive research and analysis of the current environment will set you up with the best chance of getting it right. But no one can see into the future so making sure you have the right organization in place is essential to successful leadership.

Unfortunately there is a lot that can, and so often does, go wrong. A lack of clarity, or misunderstanding of the goals, can lead to an organization designed to deliver the wrong thing. Or worse still, not deliver *anything* effectively. The diagram below shows the cascading effect when there is a lack of clarity throughout the design process.

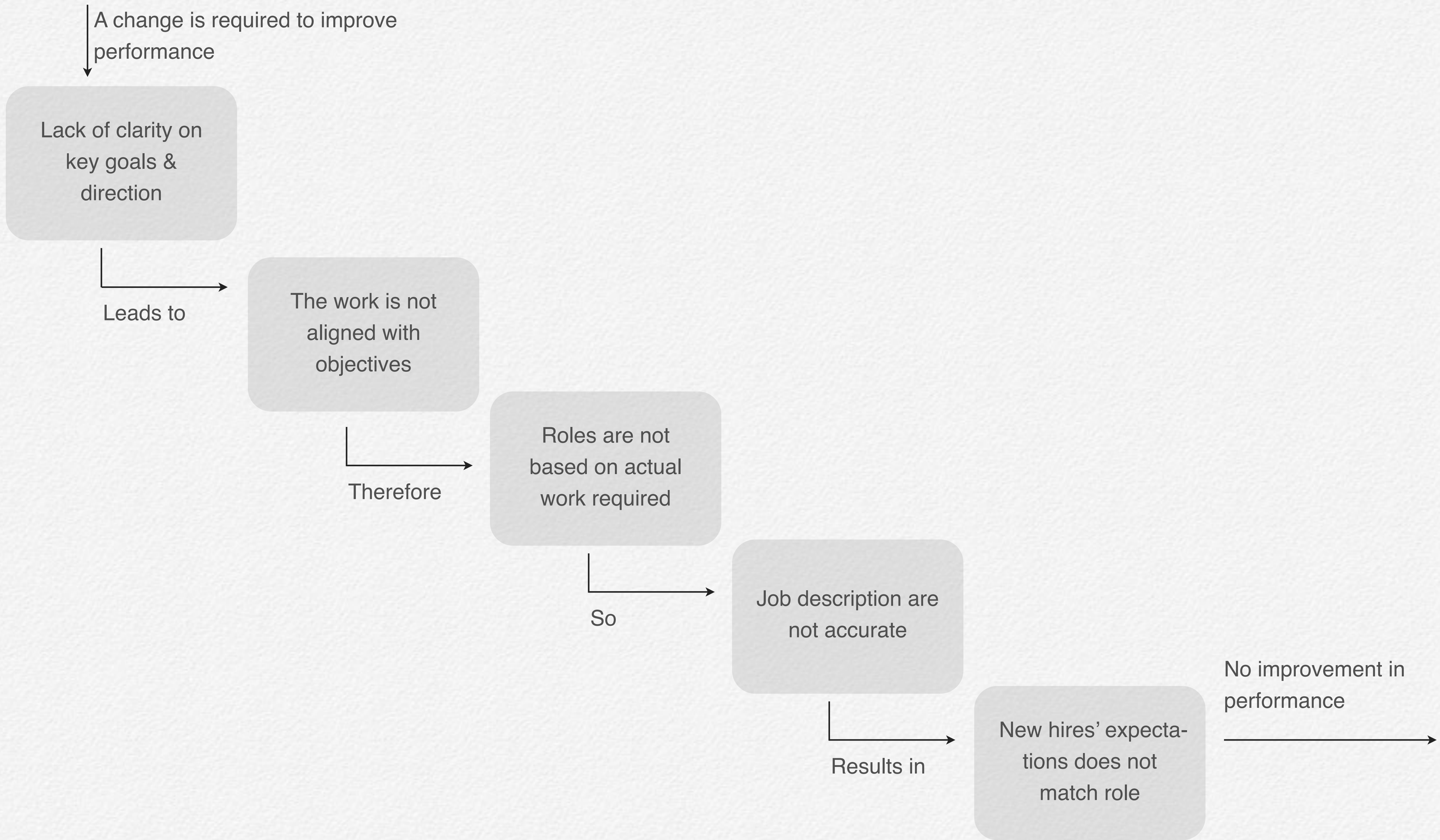


Figure 1 Strategic objectives should cascade

Our 5 step approach to Organization Design

The solution we present here mitigates this cascading effect while delivering robust designs in a relatively short period. Followed correctly it ensures work is designed to deliver on the objectives and roles are designed to fit the work. Roles and responsibilities are clear and job descriptions accurately describe what is needed from the individuals to be part of a high performing team.

Our solution is an iterative and collaborative design process that ensures a clear line of sight between the organization's objectives, the work required to meet them and the team needed to deliver it. It provides clarity on the roles and responsibilities of each member.

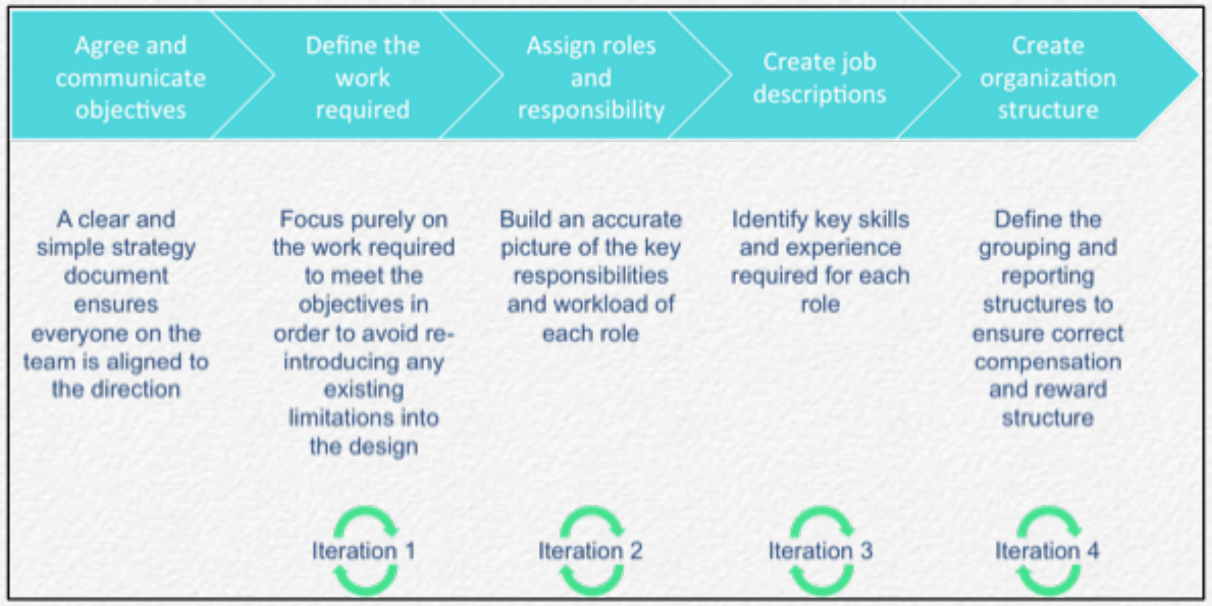


Figure 2 Overview of the design process

The essence of successful Design

This approach differs from some other approaches in two ways; the order in which the different components are designed and the iterative way in which the designs are updated.

Start by understanding the work

In many projects it's typical to start thinking about the organizational structure, and therefore the roles, up front. Often this happens before or in parallel with the design of processes.

In this approach the work (process) is defined in the absence of roles, which are then assigned later on. It means the work is designed to meet the company's objectives rather than to fit some arbitrary organization structure. Roles are then defined to support this work. Only then is a structure considered once all the required roles have been identified.

When defining a future state it is important not to be overly influenced by existing constraints. This is avoided by removing conversations about who does it and how it's done today.

Iterate the designs

Perhaps more importantly, iteration forces the team to constantly improve the design. On the first pass the team will define the work. On the second pass they will add roles at which point they will update and improve the design of the work. This happens again with each of the remaining steps. The team will be forced to ask questions of the work and therefore iteratively refine and improve the design based on the latest knowledge.

Output of the Organizational Design exercise

- A work map – describing the high level activities, roles and responsibilities required to deliver the company's objectives and goals.
- Job descriptions – for the main roles identified in the work map.
- Organization Structure – showing the reporting lines and teams.

High growth organization

This fast moving consumer goods company was in a high growth phase. While the numbers looked good there were several challenges starting to emerge. The workload across the teams was expanding faster than the company were able to recruit and train new staff.

Many teams were barely surviving, projects are starting to suffer, or being dropped altogether through lack of resource. In some areas staff engagement was rapidly decreasing as staff were unable to focus on any one thing.

Project Invent was initiated in order to understand how the teams worked together, align the team structures and deploy a new, more effective, organization. During 6 months, 3 streams made up of 6-8 subject matter experts plus facilitators and consultants designed a new organization impacting over 2000 employees.

Implementation of the new designs was phased in over 2 years by an implementation team made up of 3 full-time employees. The project paid back the investment during the first year of the implementation and was successfully converted to business as usual.

Agree & communicate objectives

The key to alignment

1

Agree and communicate objectives

1. **Purpose of this step**
2. **Deliverables**
3. **How to agree and communicate strategy?**
4. **Supporting tools**
5. **Case study - Creating a compelling business case**

Purpose of this step

Before any design work can take place it is essential that the objectives and strategies have been agreed, are measurable and are clear.

This is the most important step and may lead to many other strategic initiatives that don't necessarily require Organizational Design. This step is not the focus of this book and we recommend the guidance here is the very least the leadership should commit to.

It is essential that the design team and all stakeholders are clear on the strategy and goals.

It is, of course, also important that the right strategies are selected. For that reason we recommend a thorough assessment of the company's current position before thinking about the future direction.

Deliverables

Clarity and alignment on the direction of the company.

We recommend the use of OGSM (Objectives, Goals, Strategies and Measures). An OGSM describes the company Objective for the next period (up to 5 years), it's financial and operational Goals, the Strategies that will lead to those goals and the Measures that indicate progress of the strategies.

An OGSM should fit on one page making it easy to communicate and easy to understand.

How to agree & communicate strategy?

Assess the current position of the company.

Interviews – Conduct interviews with customers and employees to get qualitative information on the company and how it's perceived both internally and externally.

Surveys – Surveys allow you to reach a much larger audience and great for collecting more quantitative data on the company.

Competitive analysis – Review competitors and their performance in order to identify strengths and weaknesses. Source information from analysts and news agencies.

Run **workshops** with the leadership team to review the results of the assessment and set the direction using the OGSM tool.

Supporting tools

Workshop tools – flip charts, whiteboards, sticky notes and pens.

Survey tools – We have used both Survey Monkey and Google Forms to build and distribute surveys.

OGSM - MyOGSM from Archpoint Group is a great online tool for capturing, collaborating and communicating your OGSM.

Creating a compelling business case

A fairly recent acquisition had significantly increased the size of this global manufacturing company. The focus of the integration had been on R&D and manufacturing with the largely successful marketing teams still operating individually in each market. This resulted in a confusing international brand, conflicting product guidelines and a large amount of duplication.

Following consumer and employee surveys and competitive analysis it was agreed that there were significant opportunities beyond simply synchronizing the marketing efforts. Over six sets of workshops the team designed a new organization, prepared job descriptions and defined the high level processes that could exploit these opportunities.

Using this information it was possible to prepare a high level implementation plan as well as a three year budget. The executive team signed off the business case and budget and implementation began immediately.

Define the work required

2

Identify the work that will be required to meet the objectives and reach the goals

Define the work required

Purpose of this step

The design team starts by considering what work the organization will do in the future regardless of how things are done today. Today's challenges and constraints can easily influence the design in a negative way. While our knowledge and experience should have a positive impact on the designs.

Focusing on the work, and ignoring the roles, helps us to design processes that are value/customer driven. This approach helps to bridge silos and build an integrated team.

The approach used to design the work needs to be simple and easy to understand for the design team. It needs to be easy to review and easy to explain to other stakeholders that have not taken part directly in the workshops.

Deliverables

The output of this phase is a work map describing the key areas of work required to meet the company's objectives.

We recommend creating a multi-layer map where work is grouped together. The work described at the top level is broken down into another level and this is broken down again. Typically this would run to three levels of detail but this is not a hard limit.

Step 2 Define the work required

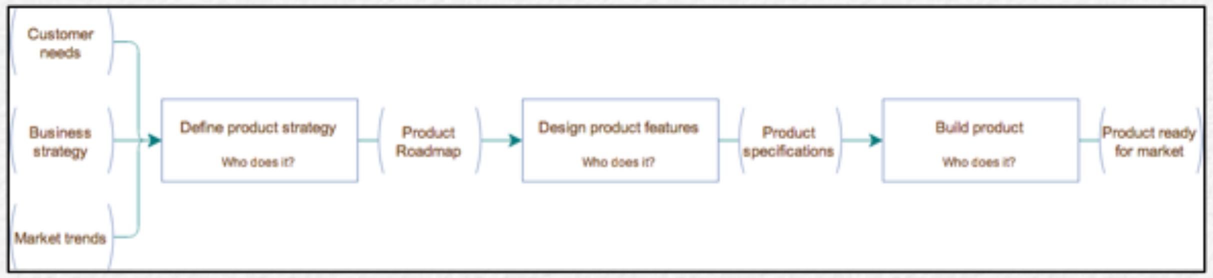


Figure 3 - Top level of a work map in Skore app

It is important that the key work is identified but not in too much detail. The detail of how the work is done will come later once the team is in place to execute it.

How to do it?

There are three sessions in this step in which the team iterate through the work to arrive at the work map.

Session 1 - Discovery workshop to identify the new work

In this workshop the team brainstorm all the work they believe is required based on the goals and initiatives set out in the previous phase.

If the team are working across multiple initiatives it makes sense to setup a whiteboard, or flip chart, for each one. The team then use sticky notes and write down every activity they can think of that would help the company reach its goals.

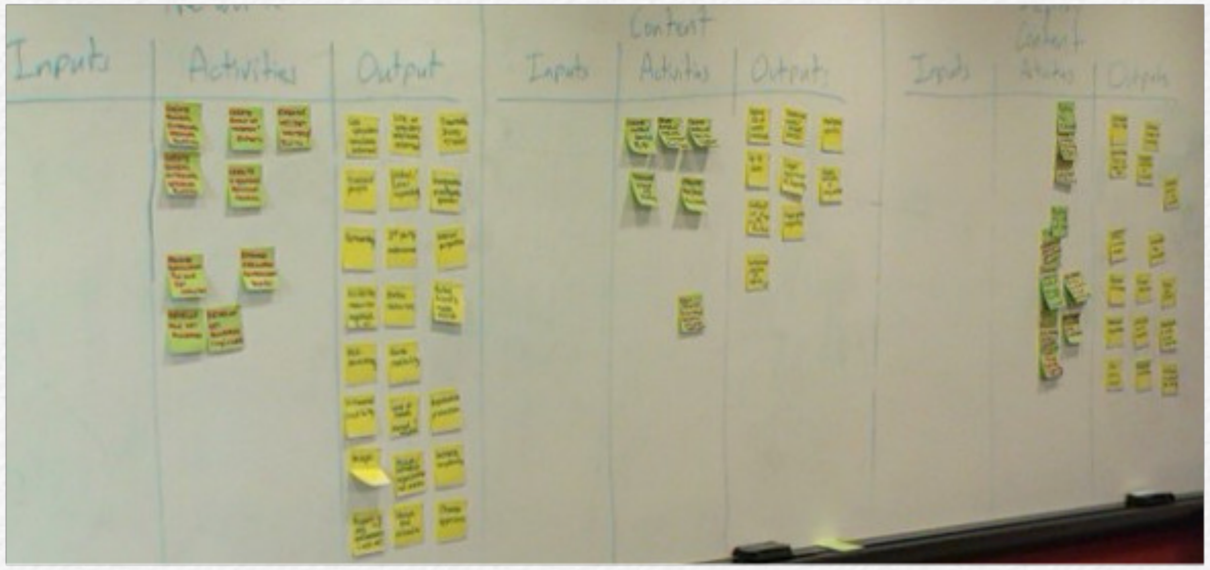


Figure 4 - Grouping work into logical sets

Session 2: Refine into logical groups of work

In the next workshop our goal is to refine the information and begin to group it into logical units of work. One tool that works well is a simple SIPOC* exercise, without the customers and suppliers. This helps separate out activities from deliverables and triggers, or activities, inputs and outputs. Use the discussion to refine the work described on each sticky note and remove any duplicates.

* SIPOC : See appendix

Tips

- Try to keep workshop length manageable. Too long and it becomes hard to keep people engaged. Too short and you spend too much time getting up to speed
- Map processes in a clear and easy-to-digest format that doesn't require too much explanation

Session 3: More detailed modeling

Once the logical groups are agreed, and these don't have to be perfect, it's time to start modeling these in more detail. The volume of information will start to increase rapidly so it makes sense to use some sort of modeling software. In a software tool it's going to be much easier to update and analyze the model in the following phases of the project.

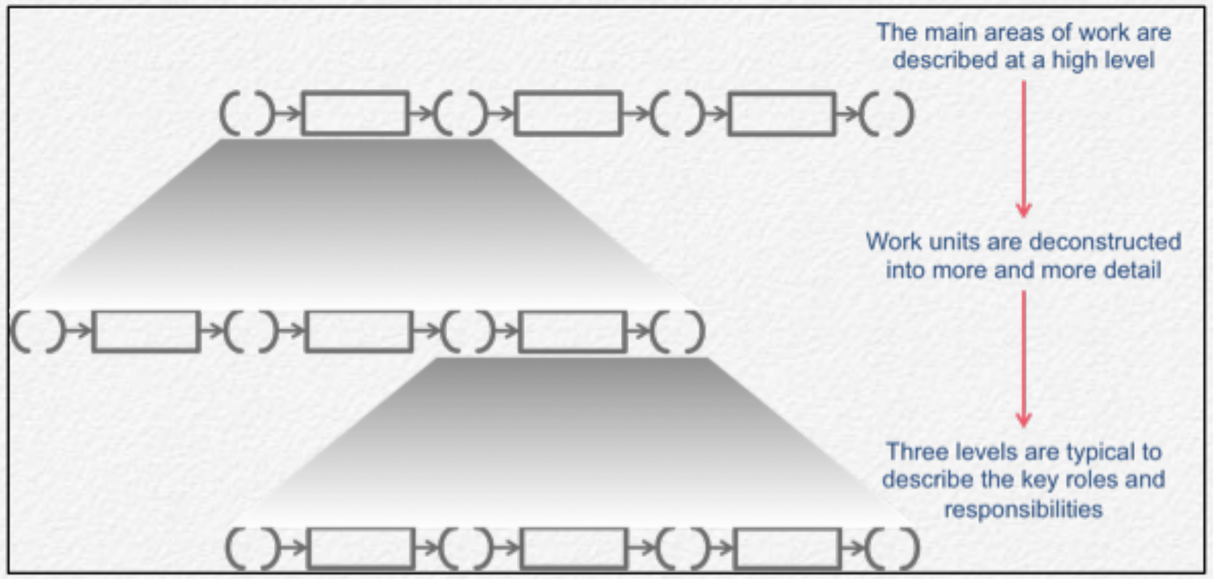


Figure 5 - The three layer model in Skore app

Work through each piece of work and define how it should be done. Try not to go into too much detail but enough that anyone else picking up this model will have a good idea about what the work is for and how it gets done.

Duration

The brainstorming workshop should take approximately 3 hours. The simple SIPOC exercise is approximately 3 hours.

The modeling phase will depend on the amount of work identified but typically it ranges from 1 to 4 days. We've found the time taken is influenced by how new/different the work is from what the company do today. If it's a case of re-organising how things are done today it tends to be much quicker. The team have a good idea about how they'd like it done already.

If these are completely new activities time is required to think through how it's going to work.

Other subject matter experts may be required to validate the design, which takes more time.

Finally, some processes might require a greater level of detail.

Supporting tools

A large whiteboard, flip charts, sticky notes and markers are essential for this work.

For the modeling work, our tool Skore app has much of the functionality to make this process as quick and easy as possible. Skore app integrates the work carried out in this phase with the remaining phases so that you only have one place to make changes.

Without Skore app, a good modeling tool is required to create the work maps. Microsoft Visio is commonly found in organizations and provides a good alternative for modeling.

Build or buy ?

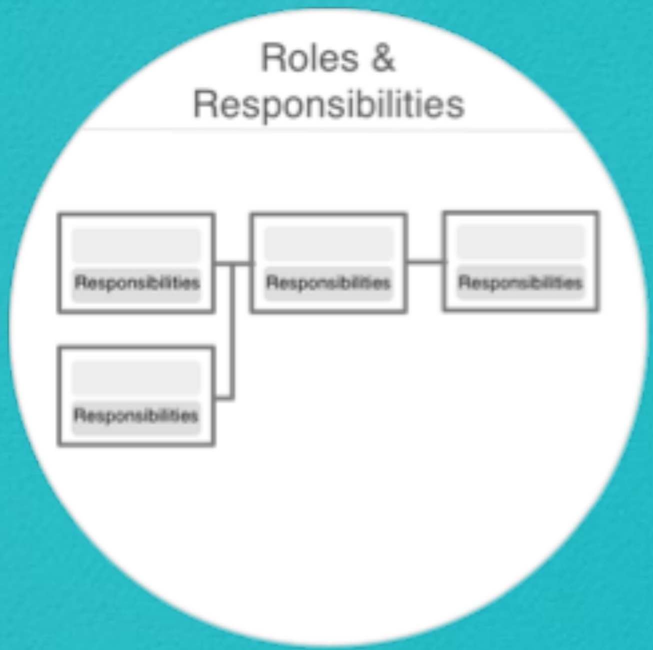
A specialist team within a European services company were asked to deliver a significant change in business strategy. They needed to quickly understand what was feasible with the existing team and how to fill the gaps. With existing work already documented the team created a work map that brought this together with the new work.

Aligning the roles with the new work map showed the team the existing capabilities and what was missing. The development of the role and job descriptions provided the hiring, training, timing and budget requirements for the missing capabilities. With this information the team could provide two solutions; to develop the new capability versus acquiring an existing company.

Assign roles & responsibilities

3

Identify the roles that will perform the work in your new organization



Assign roles & responsibilities

Purpose of this step

Identify the roles that will perform the work defined in the previous step.

We will also define the responsibilities of each role and the extent to which they participate in each piece of work. For example who will own the work and be responsible for ensuring the correct outcomes? Who will do the work? And what other people need to be involved?

This is also a chance for the team to iterate over the work map. As the team begin to add roles and responsibilities it helps to provide additional context to each piece of work. The team can challenge and improve the model.

Clarification of the Roles & Responsibility (R&R) can be in itself a driver for an Organizational Design project. With this approach, you will first get a better understanding of the work to be done, and, as a result, you will better understand the involvement of the roles.

Deliverable

At the end of this step the team will have a list of roles, that support the work, and those roles will be assigned to the work map

Step 3 Assign roles & responsibilities

based on a Responsibility model such as RACI* (we recommend the RATSI model as an alternative).

* See Appendix

Session 1: Identify an initial set of roles

The first session is to identify a set of roles to support the work. This is best captured on a flipchart or whiteboard so that it can be referred to, and updated, throughout the phase. The initial list does not have to be exhaustive, it can be added to and revised as the work progresses. At this stage it forms a base to work with.

Session 2: Assign roles to the work

Now refer back to the work map, working through each unit of work, assign relevant roles based on the responsibility model. The team may update and improve the work map at the same time as discussions around roles will add further clarification to the work.

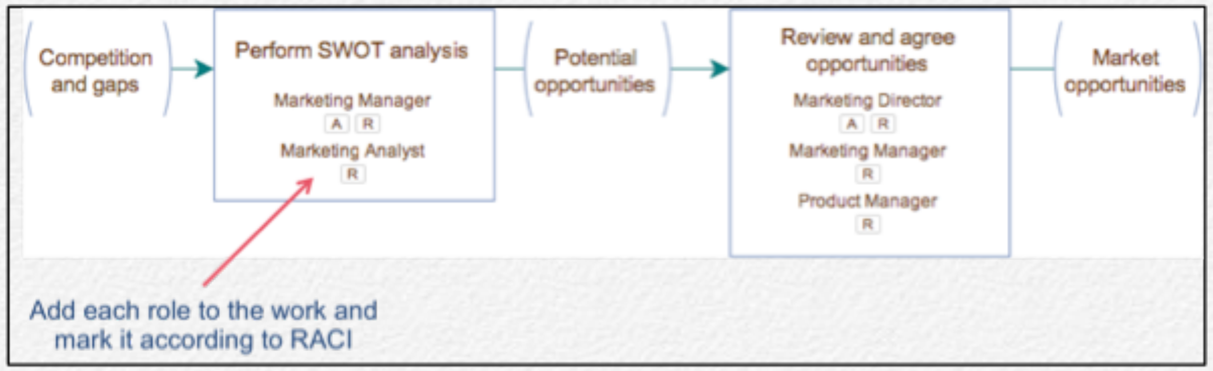


Figure 6 - Assign responsibilities to the work map

In the multi-layer model work map, as discussed in the previous step, we recommend that you assign a single role to any piece of work that has been broken down into more detail. In RACI we would assign the A for Accountable (R for Responsible in RATSI) to these high level steps. This highlights the person with the overall ownership for ensuring that work gets done.

Duration

The initial roles workshop is approximately 30 minutes to 1 hour.

Assigning the roles to the work is roughly half the time taken to define the work originally. If it took 2 days to define the work then expect approximately 1 day to assign the roles.

Supporting tools

When assigning the roles to the work it is essential that you use a system that allows you to easily extract the data for the following phase. It may be necessary to export the steps from the work map into a spreadsheet then assign the roles. Special care should be taken to ensure the two documents are kept in sync as updates and changes are made to the work map.

Skore app supports this approach natively; reports can be built in real time from the most up-to-date version of the work map. Changes on the work map are instantly reflected in the built in reports. It's also possible to export these reports for further analysis.

Creating a world class customer service

This European technology company had grown rapidly through acquisition leaving them with customer service desks in multiple countries. International customers complained of varying service levels in each country. The executive team decided to consolidate all service desks into one shared service center in order to improve customer experience and reduce costs.

The design team produced a work map that was used to train staff and role descriptions that were used to size the team based on the Erlang model. A comprehensive training program was developed, based on the designs, in order to re-skill the existing teams and new hires. The new model was successfully implement on a country-by-country basis with countries reporting a significant improvement in customer satisfaction.

Create job descriptions

4

Refine the roles and prepare the initial job descriptions to find the right talent!

Create job descriptions

1. **Purpose of this step**
2. **Deliverables**
3. **How to do it**
4. **Duration**
5. **Supporting tools**

Purpose of this step

Refine the roles and prepare the initial job descriptions that can be used to fill those roles with the most appropriate talent.

Once all roles have been assigned to the work it's possible to start reviewing job descriptions. With a tool like Skore app it's possible to quickly create reports based on each role to see their key tasks, responsibilities, and handovers to or from other roles.

In this step the design team will review each role description and improve these in order to create a coherent and realistic set of job descriptions directly related to the work. Using an integrated model it is possible to update the work map and the role descriptions in near real time. This saves a lot of time and ensures the job descriptions are aligned to the work that has been specifically designed to deliver the organization's objectives.

Deliverable

At the end of this phase the team will have prepared draft job descriptions for each role based on the work map.

Step 4 Create job descriptions

How to do it

Using the reports developed in the previous step the team must review each of the roles based on the work they have been assigned to. Reviewing these reports the team must decide whether each role constitutes a real job, or whether the level of work is too complex for an individual. They must ask; Is it reasonable? Is it sufficient for a single role? How many people do we need?

Many roles will have only been assigned once or twice and some may be over subscribed. The job of the team is to identify those and make decisions on what to do with them. Can smaller roles be merged into larger roles? Can the larger roles be split into smaller roles? Does the work make sense for the role? Is the job description coherent?

Questions you'll need to answer:

- Is the workload reasonable?
- How many people are required for that role?
- What skills and experience will be required?

This ensures that all roles are balanced and, when the time comes to implement, the work and roles remain aligned to the objectives and goals.

The team should also consider the skills and experience of each role and add these to the job descriptions.

The team can review roles in any order, although we use some simple graphs to help us prioritise certain roles to focus on initially.

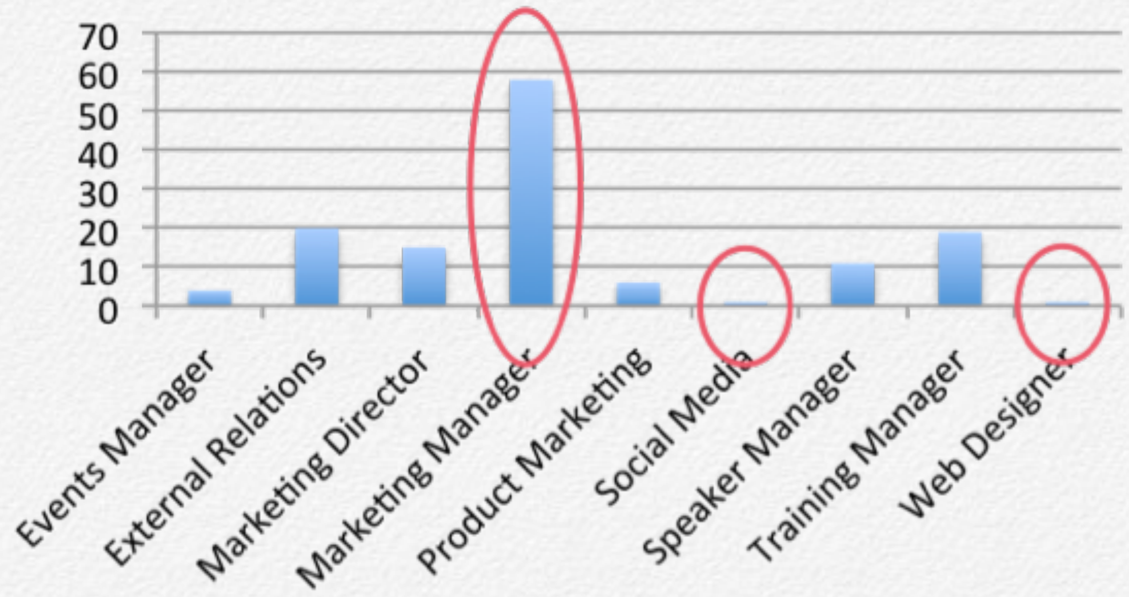


Figure 7 - Accountable (RACI)

Use your knowledge of the work processes to better understand these "absolute" numbers. There is no right or wrong quantity of activities for a role

This example shows the number of times a role has been assigned as Accountable to an activity in the work map. It helps us to focus and prioritize which roles we review first.

Low counts suggest the accountability may lay elsewhere for this activity. In this example we re-assigned this work to another role thereby removing this role from the graph.

The high counts may mean that the role is too large and some work needs to be shared among others.

With each change to the roles the work map should be updated to reflect this keeping the work map and job descriptions in sync.

We recommend running a similar analysis on the Responsible assignments. This helps to start thinking about the amount of actual work the team are expected to do and the number of people required for each role.

Duration

These sessions take approximately half as much time as the work mapping.

Supporting tools

If the company has it’s own job description templates these are useful as a guide for the sort of information that can be considered at the same time.

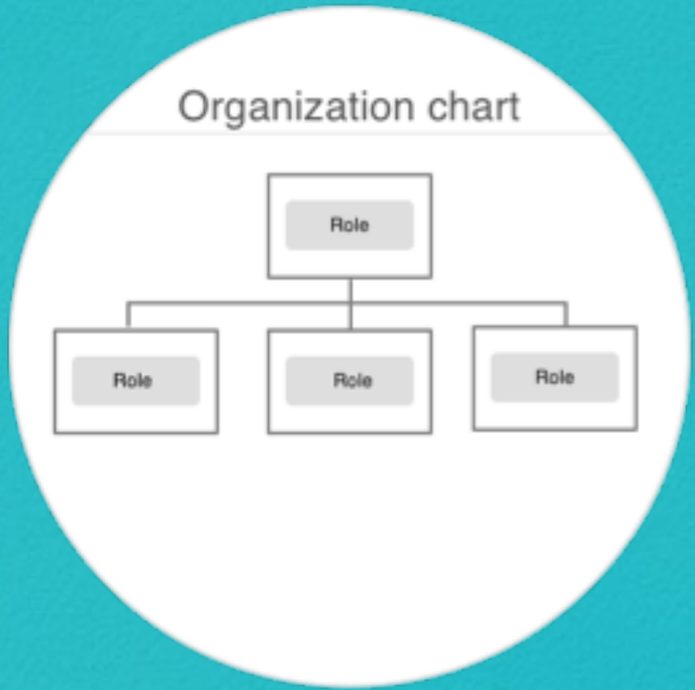
A spreadsheet or other analytical tool to help you create graphs.

Skore app generates the role descriptions from the work map and keeps the model in sync after each change.

Create the organization structure

5

Define the structure, reporting lines and teams



Create the organization structure

1. Purpose of this step
2. Deliverables
3. How to do it
4. Duration
5. Supporting tools

Purpose of this step

The final step is to define the structure of the new organization, the reporting lines and teams.

Depending on the type of work the team is performing it may also be possible to accurately size the team without further analysis.

Based on the initial job descriptions this is a fairly straightforward step as the design team will have shaped the roles and have a good feel for where they would fit. This last step also serves to finalize the job descriptions in terms of reporting lines. It also aids with compensation and reward structures.

The resulting job descriptions are clearly aligned with the work that has been specifically designed to deliver the objectives. These job descriptions form the basis for hiring new talent or identifying development requirements for the existing team.

Deliverable

Organization structure and finalized job descriptions.

Step 5 Create organization structure

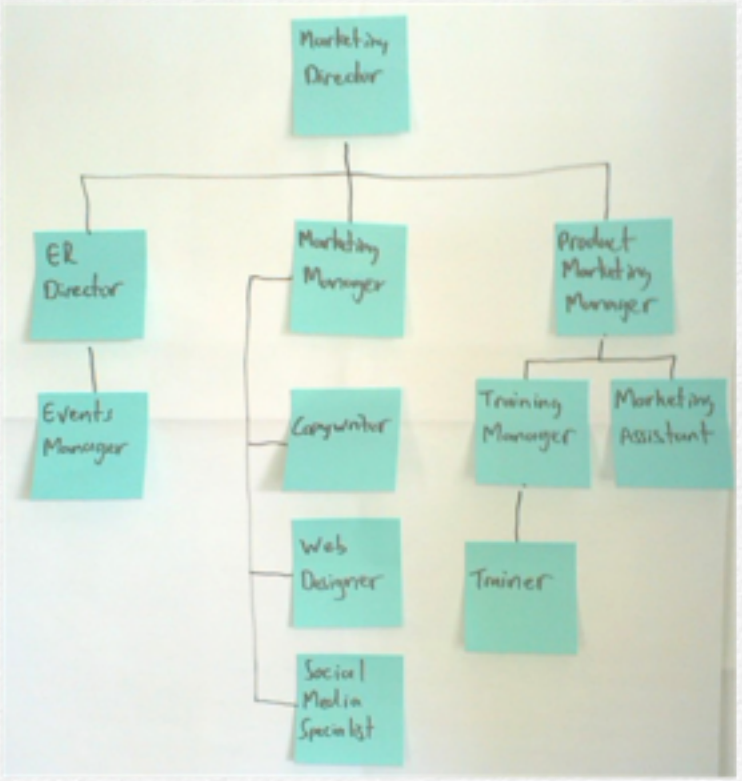


Figure 8 Simple organization chart with sticky notes

How to do it

Using the job descriptions from the previous step, organize the roles into the best organizational structure. Finalize the job descriptions with reporting lines, rewards and compensation.

Duration

Approximately 1 – 2 hours plus any time spent updating and finalizing job descriptions.

Supporting tools

Any tool that allows you to quickly create Organization Structure diagrams. We often use a whiteboard and sticky notes to allow the team to be involved before committing the structure to a software tool such as PowerPoint.

What's next?

Prepare, Implement & sustain the change

What’s next?

1. **Build a business case & implement**
2. **Change Management**
3. **Planning the change**
4. **Measure Performance**
5. **Measure Behavior change**
6. **Competencies / training need analysis**

Build A Business Case & Implement

Having built the work map, defined the roles, and the structure, you have in your hands a solid base for further analysis including **implementation planning**, **budgets** and **gap analysis**. Prepare a business case for a future transformation that is clearly aligned with strategic objects and contains thorough and in-depth analysis of the future state. Good luck for the board meeting!

Change Management

> *“People don’t resist change. They resist being changed.”*

Peter Senge

Organizational Design is about designing a future state and leading the organization to it. Your carefully designed processes and job descriptions are a solid base to get started.

The work map can be published online, along with the job descriptions and the organization chart.

Teams affected by the change will have to be onboarded, trained and the performance measured (this is where the OGSM comes back in)

What's next?

Every time the design is challenged, the same question will occur: fix the design or fix the way we, the people, are applying the process?

In the first few months it is important to be open minded about ideas to improve the design, but also demand obedience to what has been designed. We cannot improve what hasn't been tried at least once in full.

Planning The Change

If you are transforming an existing organization, not all the changes can be implemented simultaneously. Identify changes with the highest impact for the least effort possible to show that it's possible. Be transparent about the roll out plan. Involve everyone interested.

Measure Performance

There are two different things that will measure the impact of your change

- Are the new ways of working applied?
- Does this generate the expected result?

This is the difference between measuring how I travelled from Paris to Berlin (by car as instructed) and how fast I reached Berlin (a lot longer than expected because the traffic was much worse than expected. I should have flown there!).

Measure Behaviour Change

The first measure described above is about measuring a change in behaviours. For that, we can identify simple elements in our work map that confirms the process has been followed or not. When too many "no"s are collected, we can start investigating the root causes and fix them one at a time. When only "yes"s are collected, it's time to change the measure.

Competencies / Training Needs Analysis

From the work map, it is easy to associate skills & competencies required for each bucket of work. It helps creating a personalised development plan for each employee.

If you'd like us to write more about one of these topic, contact us at info@getskore.com

Appendix

Appendix

Organization design checklist

Responsibility models RACI and RATSI

RACI is perhaps the best known of the responsibility models. RACI stands for Responsible, Accountable, Consult and Inform. These describe the level of responsibility that an individual, or role, may have in a given piece of work. In terms of this process it enables us to understand the level of skill and experience that each role may require and therefore help in the selection and/or development of talent.

One criticism often leveled at RACI is the ambiguity between the R (Responsible) and A (Accountable). Especially in international organizations where the English definitions of these terms do not always translate clearly into other languages. For this reason it is recommended that when using RACI a clear definition of each level should be agreed among the team beforehand.

Skore app also supports an alternative approach called RATSI, Responsible, Authority, Task, Support and Inform. In this model Task explicitly calls out that the role must perform work. Responsible means the role responsible for the outcome of that piece of work (which is defined using the Skore app modeling technique). Authority means the authority to make Go/No Go decisions. This approach goes some way to resolving the ambiguity in RACI although still benefits from a clear agreement on the definitions of each level before the project starts.

Enable RACI / RATSI in Skore app

Go to the Main menu then “Settings”. Enable RACI or RATSI

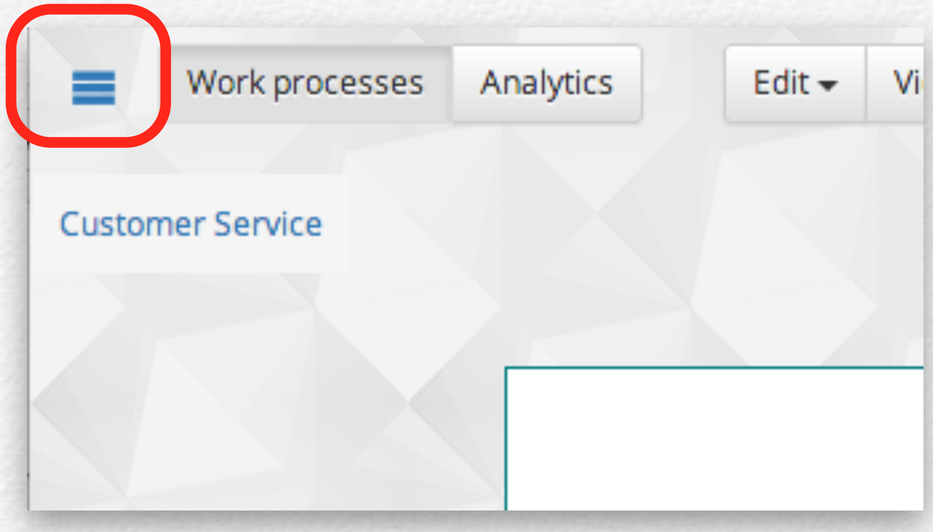


Figure 8 Skore app Main Menu

Export roles data from Skore app

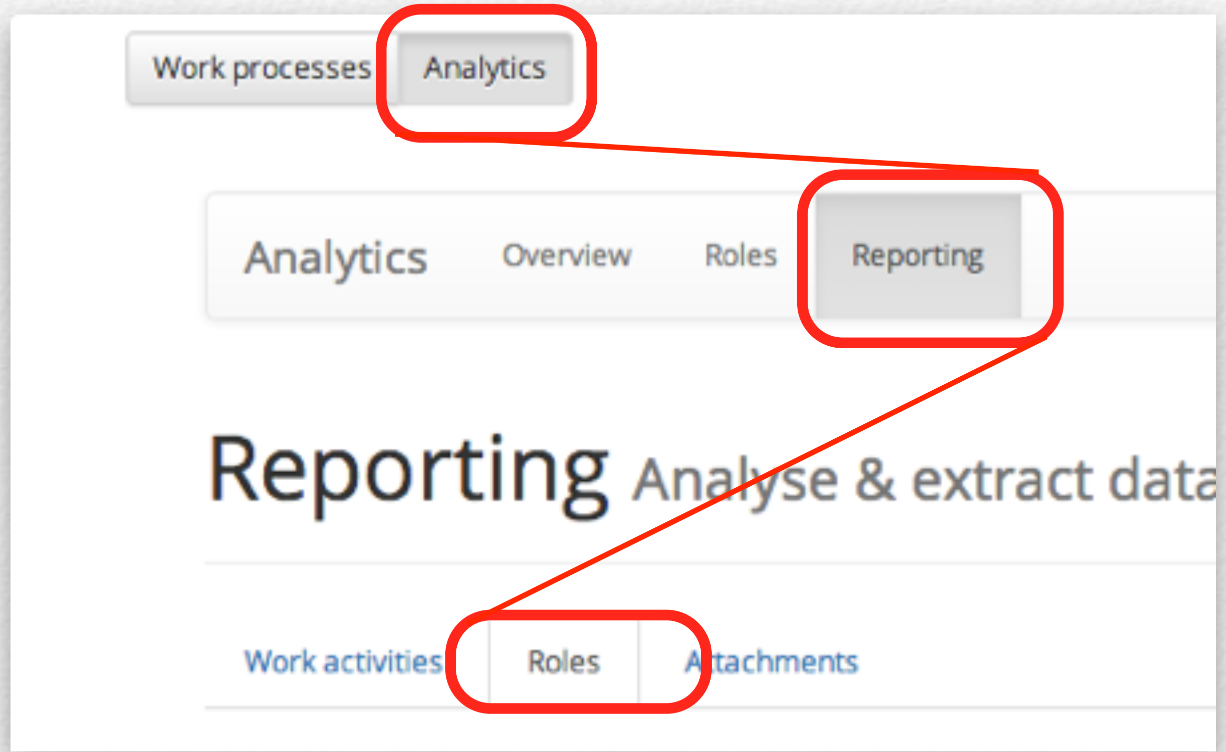


Figure 9 Find roles report in Skore app

From there you can view & export the reports.

OGSM Tool

An OGSM is a strategic planning tool to help align and effectively communicate the company’s vision and direction. OGSM stands for Objectives, Goals, Strategies and Measures which would typically be defined on a single page, or in such as away as it can be easily communicated to the rest of the organization.

- Objectives – the company objective defined by the leadership team (words / sentence)
- Goals – long term (up to 5 years) financial or operational goals (numbers)
- Strategies – the initiatives and changes that are designed to deliver the goals (words)
- Measures – the key measures that allow the team to track the progress of the strategic initiatives (numbers)

For more information see this article.

Simple SIPOC exercise

Duration: Approximately 2 hours

In the 'Design the work' step the design team will brainstorm a number of activities they believe are required to deliver the objectives. This results in a large number of activities, often with many duplicates and of varying levels of detail. In order to start refining the list it helps a great deal when the activities can be grouped into 'buckets' of work that are in someway related.

At first glance there are probably some obvious groups and some activities that don't sit into any group. This simple SIPOC (or perhaps IPO) helps to group and refine those buckets of work in preparation for the next phase.

Identify 5 or 6 (or more if relevant) buckets and write these on the white board at intervals. Underneath each heading draw three columns, for Inputs, Process and Outputs. Now have the team take the sticky notes they previously used to identify the activities and place these into the appropriate columns.

You will find that during the brainstorming session some participants will define anything they think is required for success, whether an activity or something else. In this exercise they will separate the work from inputs and deliverables.

As the columns are populated it will become clear which buckets make sense and which don't. Be flexible and re-write the bucket headings, remove buckets and add buckets as required.

Simple work modeling with Skore app

Skore app uses a simple modeling technique developed from IDEF0, a systems based functional modeling approach used by the US Air force. It uses a simpler notation than typical process approaches and natively supports hierarchical mapping, making process decomposition very easy.

The benefits of this approach are:

- Quick and easy to learn - making it easy to apply and easy to explain to all members of a change program
- Engaging – as it's easy to learn and understand the team are able to spend more time on design and less on the methodology
- Value driven - meaning that the focus of the approach is on the outcomes of the work over the work itself
- Focused – The hierarchical approach allows teams to focus on details in the context of the wider process or system

This technique is used by companies all over the World for organization design, process improvement, change management, quality management among many others.

Get Skore app from www.getskore.com

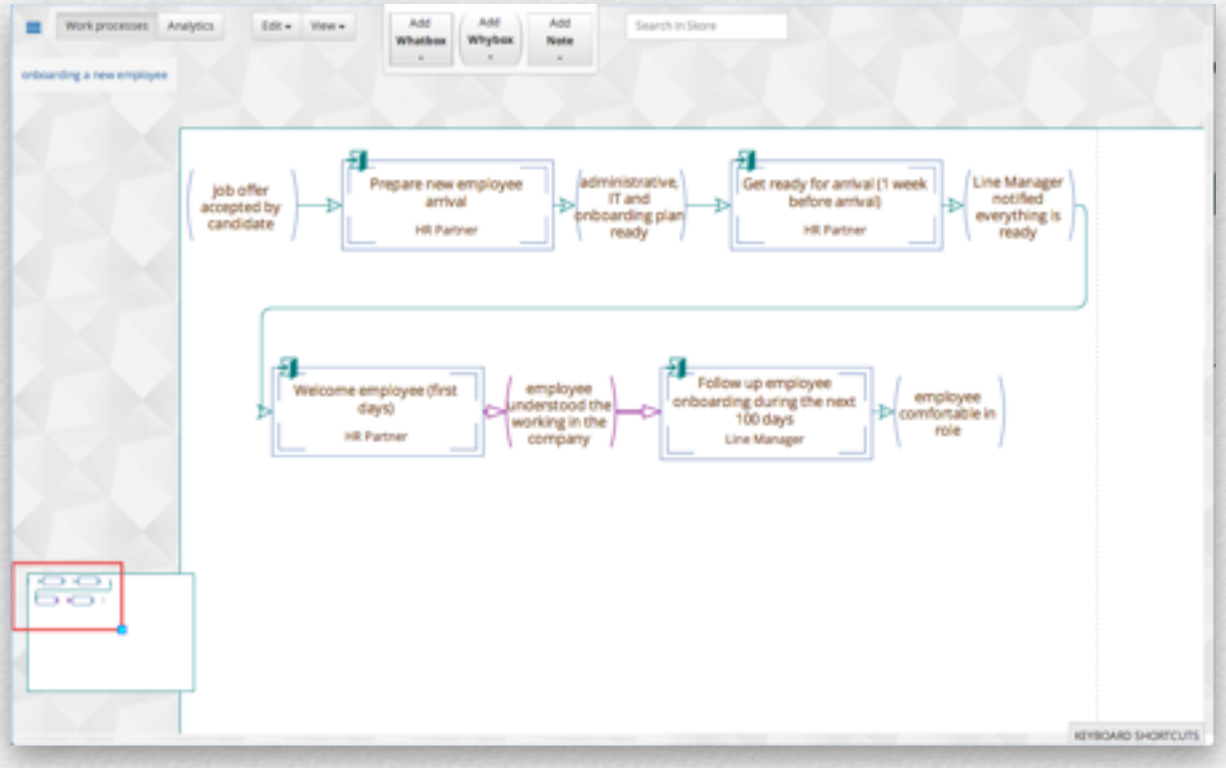


Figure 10 Demo process in Skore app

License

Thanks

This book has been published in August 2015. Thanks to people patient enough and willing to give feedback on the first version of this book. Thanks for your support.

Craig J Willis & Colin Claverie