



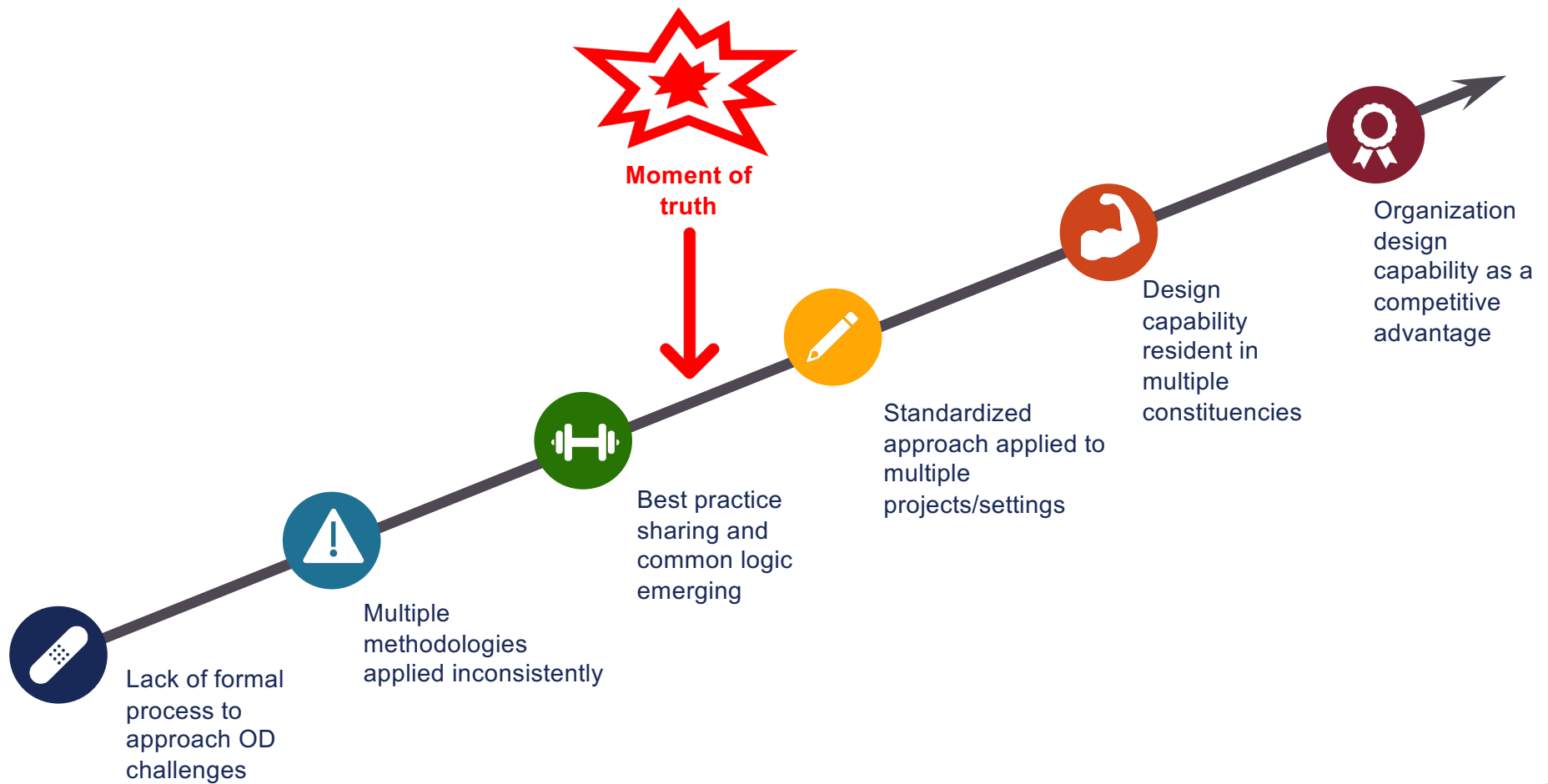
Creating Organization Design Capabilities to Deliver Lasting Value

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Evolution of Organization Design Capability





Components of Capability Building

Today's Agenda:

- Building **sponsorship and a business case** for the needed investments in training, toolkits, and technology
- Clarifying your **delivery model**
- Developing internal organization design skills through **training**
- Ongoing **Learning and Support**
- Providing **shared access** to learning resources



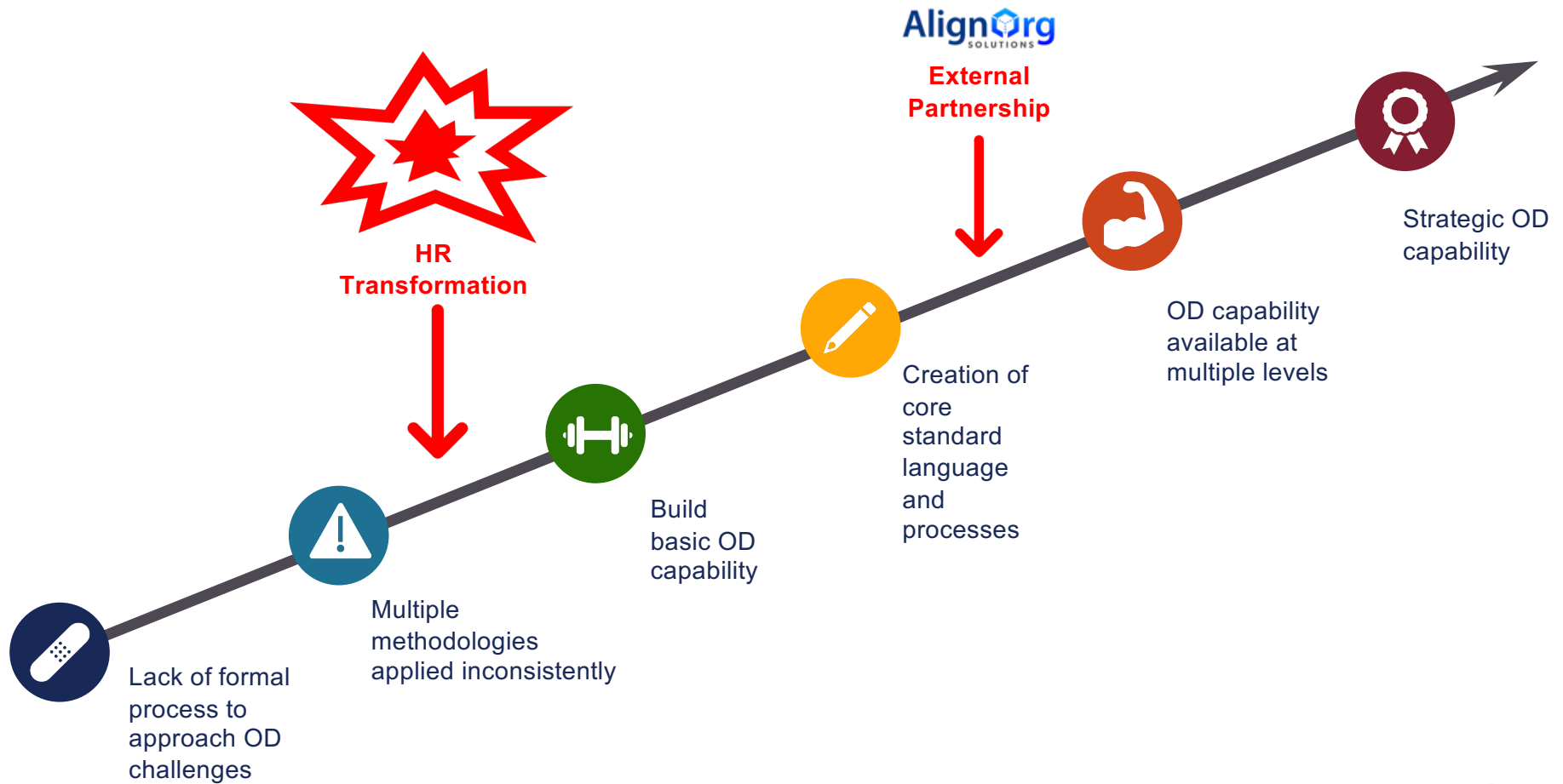


Sponsorship & Business Case





Evolution of OD Capability at Nutrition/Pharma Company





Steps to Building OE Capability

Nutrition/Pharma Company

STEP 1

Senior HR Sponsorship

- Expectations
- Support

STEP 2

Partnership & Consulting Support

- COE development (OE & L&D)
- Partner identification
- Method & tool kit customization

STEP 3

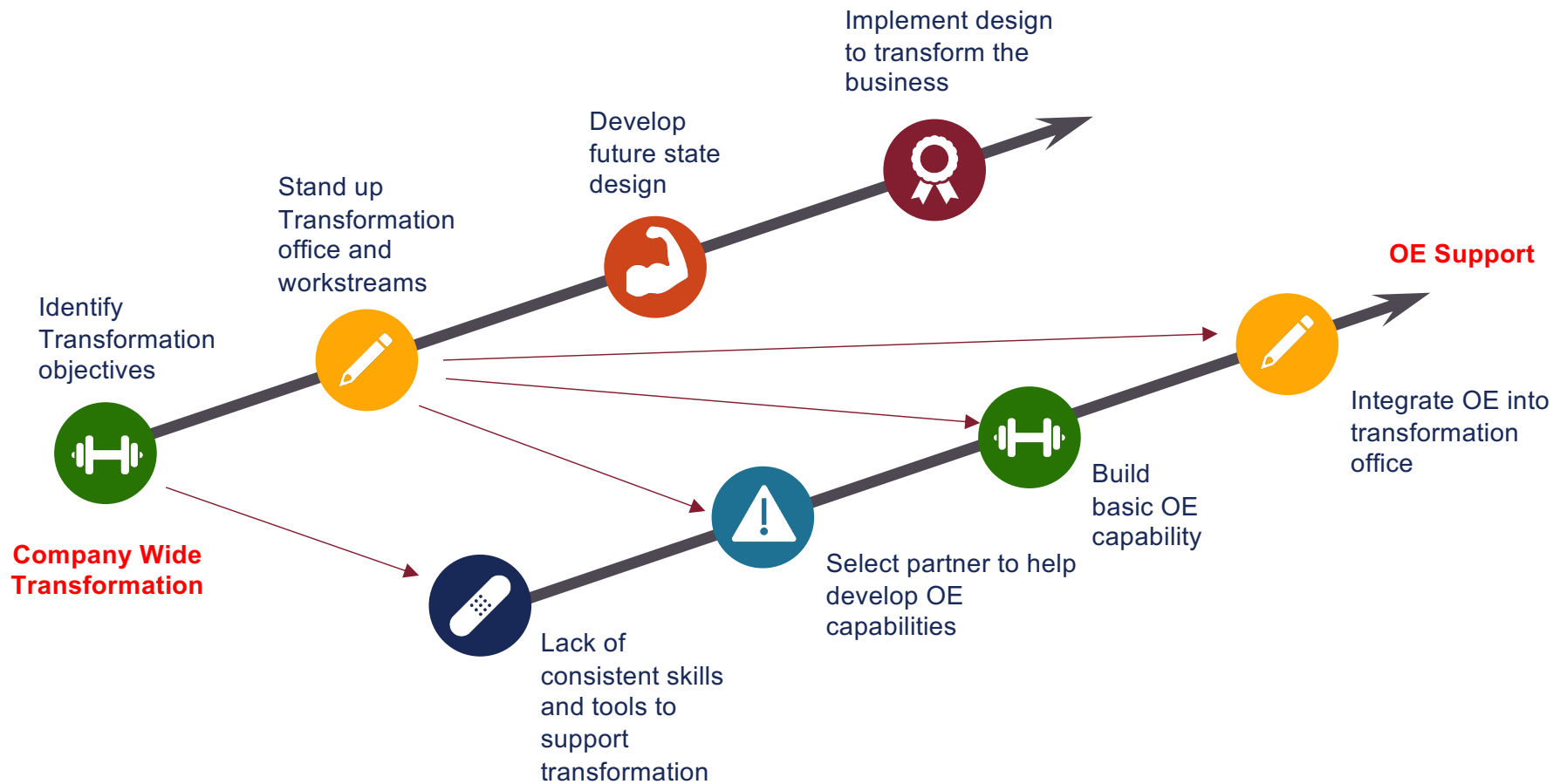
Deployment & Training

- Pilot deployment
- World-wide training & roll-out
- Shared access to toolkits and refresher training
- Side-by-side projects
- Ongoing sustainment



Company Transformation Banking Industry

Example





Business Case

Internal Capability Building



Problem We Need to Solve

- Lack of internal organization design expertise, capability & capacity
- Marketplace changes demand an organization that can adapt
- Limited self-diagnosis of misalignments in capabilities, choices, and strategic planning



Objectives & Deliverables

- Establish internal capability to meet transformational and continuous improvement needs of the organization
- Establish the delivery infrastructure, intake and delivery processes, talent development, and tools/frameworks necessary for robust internal capability
- Implement an aligned organization design model, language, tools, and training



Business Case

- Internal design & coaching capability to support real-time leader needs
- Save on external spend for organization design consultancy
- Increase speed to adjust organization choices to align with market shifts
- Increase partnership capability of HR professionals to increase value-add to the business



The Charge

Establish the infrastructure and processes necessary to deploy organization design capability, including:

- a delivery model
- a common organization design model, language and tools
- training
- shared (portal) access to toolkits and other resources
- opportunities for extending learning through a supportive OD community



Delivery Model





Engagement Models

Team of Specialists



- OD specialists who prioritize requests or support client groups
- Leverage tool kit and method to drive consistency
- Limited bandwidth and few opportunities to build internal capability

All HR Business Partners



- OD specialists develop tools and train others (often in HR to apply tools/methods)
- Requires a tool kit and method to drive consistency and scale
- Difficult to maintain fluency if there are long periods between projects

Tiered Model



- OD specialists support select, complex projects and coordinate external partnerships
- HR BPs use tools and methods on everyday organization design needs
- More junior HR practitioners learn to recognize and diagnose OD needs

Capacity can be expanded by finding external partners who wear the organization's jersey and support overflow projects or complex projects



AlignOrg Solutions' Capability Building Philosophy

Why should we build internal capability?

We believe:

- Leaders and employees change when they are involved in orchestrating the change
- You don't change organizations unless you change the way people think about how the organization competes & operates

That is why we:

- Serve as facilitators asking “hard questions” and using tools to develop insight and decision-making skills
- Ensure all aspects of an organization are aligned (e.g., processes, structure, metrics, roles, rewards, people)

When building internal capabilities, we have learned that:

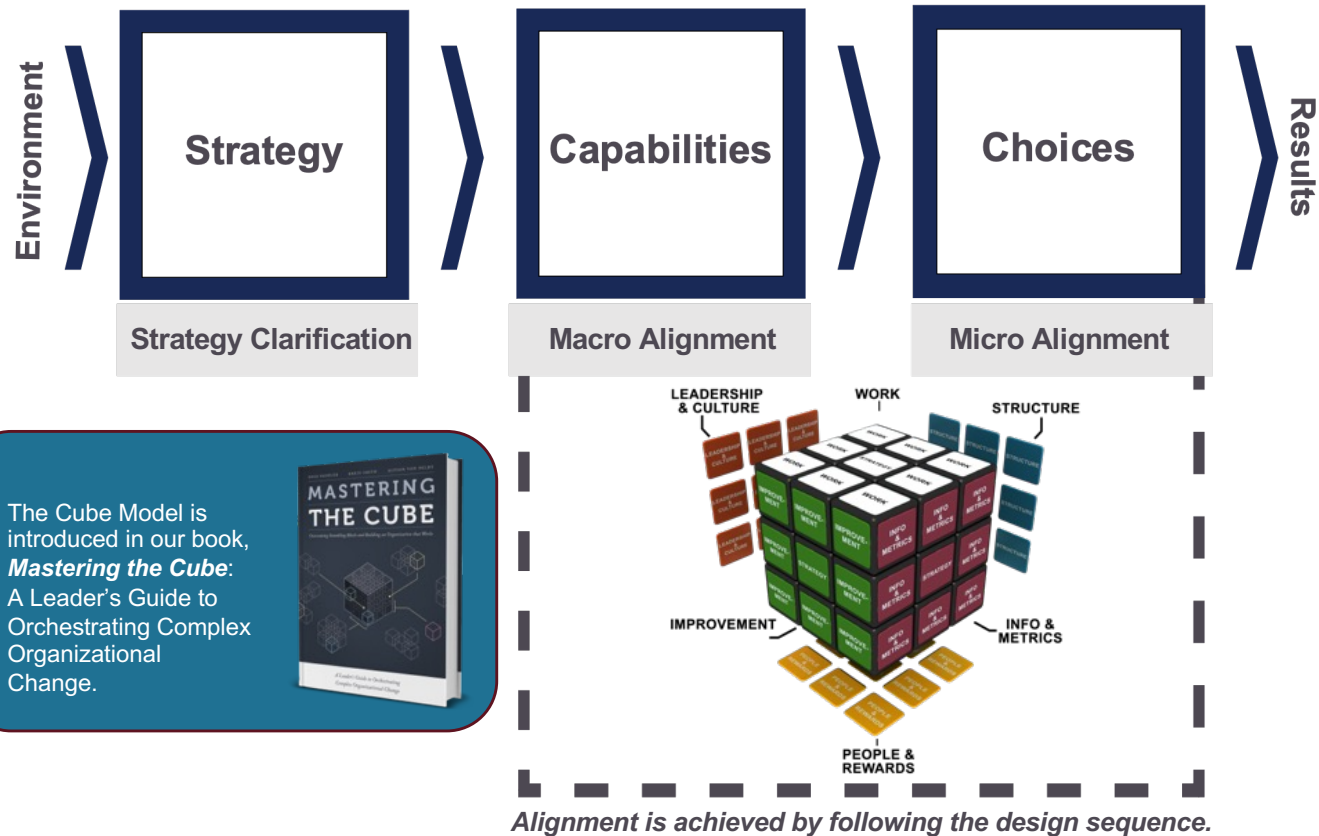
- Professionals learn and embed new capabilities through practice and experience
- Expertise grows progressively through a sequence of training, shadowing, co-facilitation with experts



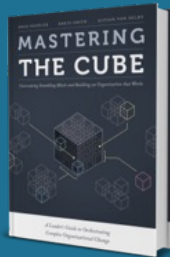


Organizations Are Puzzles to be Solved

The Organization Design Model



The Cube Model is introduced in our book, **Mastering the Cube: A Leader's Guide to Orchestrating Complex Organizational Change.**





Design Sessions Facilitated Virtually

Screenshots





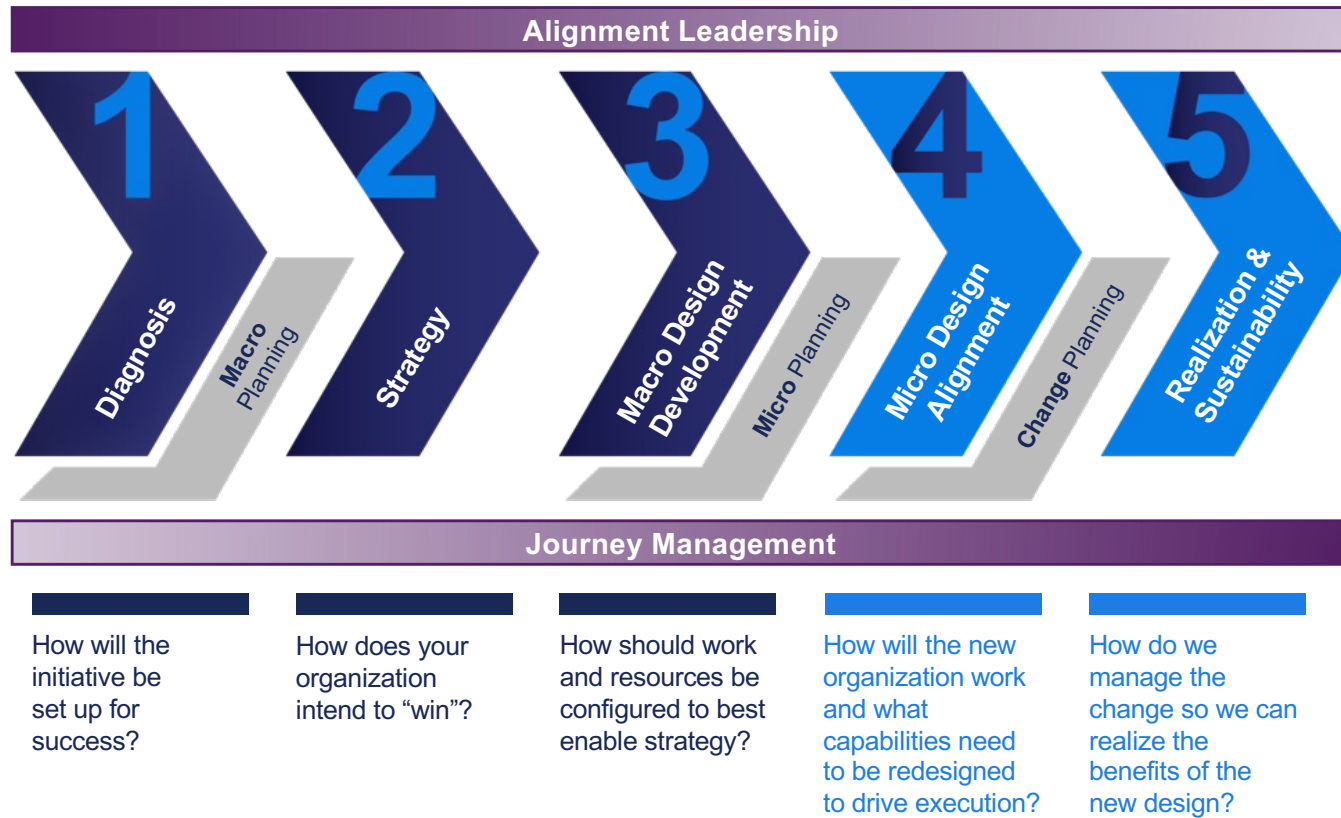
Methods & Tools / Training & Development





The AlignOrg Method

Organization Transformation Process





Training Programs for Organization Design Practitioners

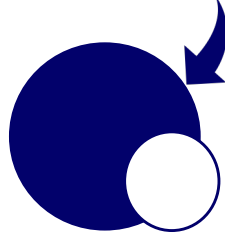
Organization Diagnostics



1 day

- ✓ Learn to diagnose organization situations and select proper interventions
- ✓ Understand and use a diagnostic model
- ✓ Influence internal leaders to engage in root cause analysis of organizational problems and issues

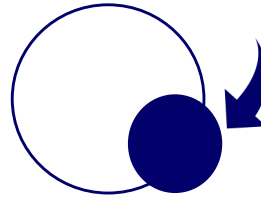
Macro Design



2 days

- ✓ Learn to align organization choices to marketplace strategy using macro design tools
- ✓ Assist in identifying differentiating work and properly design an organization to support this work
- ✓ Assist in restructuring organizations for greater competitiveness
- ✓ Link work across organization boundaries

Micro Design



1 day

- ✓ Learn to achieve micro design alignment by using the right tools
- ✓ Ensure that the connection between organization design choices and strategy/macro design are clear and aligned
- ✓ Understand the outcomes and benefits that can be achieved by following the micro design process

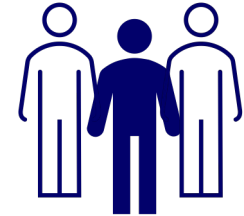
Journey Management



1 day

- ✓ Use the appropriate change management tools in the context of an organization design implementation
- ✓ Assess the change management and individual transition issues involved in an intervention
- ✓ More effectively influence change leaders and change resisters
- ✓ Implement a specific action plan to apply tools and learnings

Alignment Leader



2-4 hours

- ✓ Understand how organization design drives performance and learn a powerful metaphor and model for aligning organizations
- ✓ Review key tools/frameworks that will help leaders align organization choices and capabilities to strategy
- ✓ Learn the building blocks that help leaders lead organization transformations



Training Programs Should be Based on Tools Practitioners Can Use

Differentiation by Design®



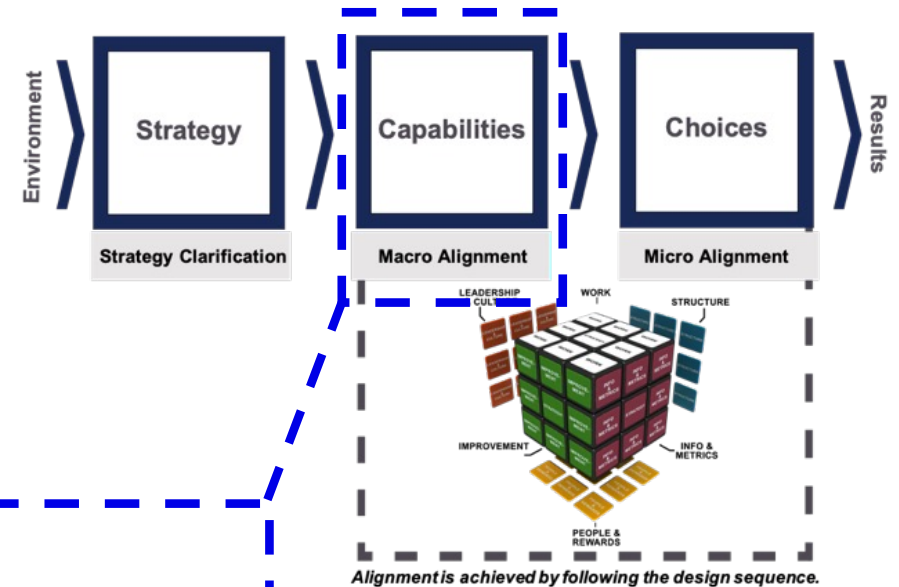
2-days

Macro Design

- Learn to align organization choices to marketplace strategy using macro design tools
- Assist in identifying differentiating work and properly design an organization to support this work
- Assist in restructuring organizations for greater competitiveness
- Link work across organization boundaries

Sampling of Tools:

- | | |
|--------------------------------|------------------------|
| • Gap Analysis | • Business Model |
| • Stakeholder Requirements | • Work Categorization |
| • ANCHOR | • Organizing Rationale |
| • Differentiating Capabilities | • Linkages & Matrix |
| • Design Criteria | |





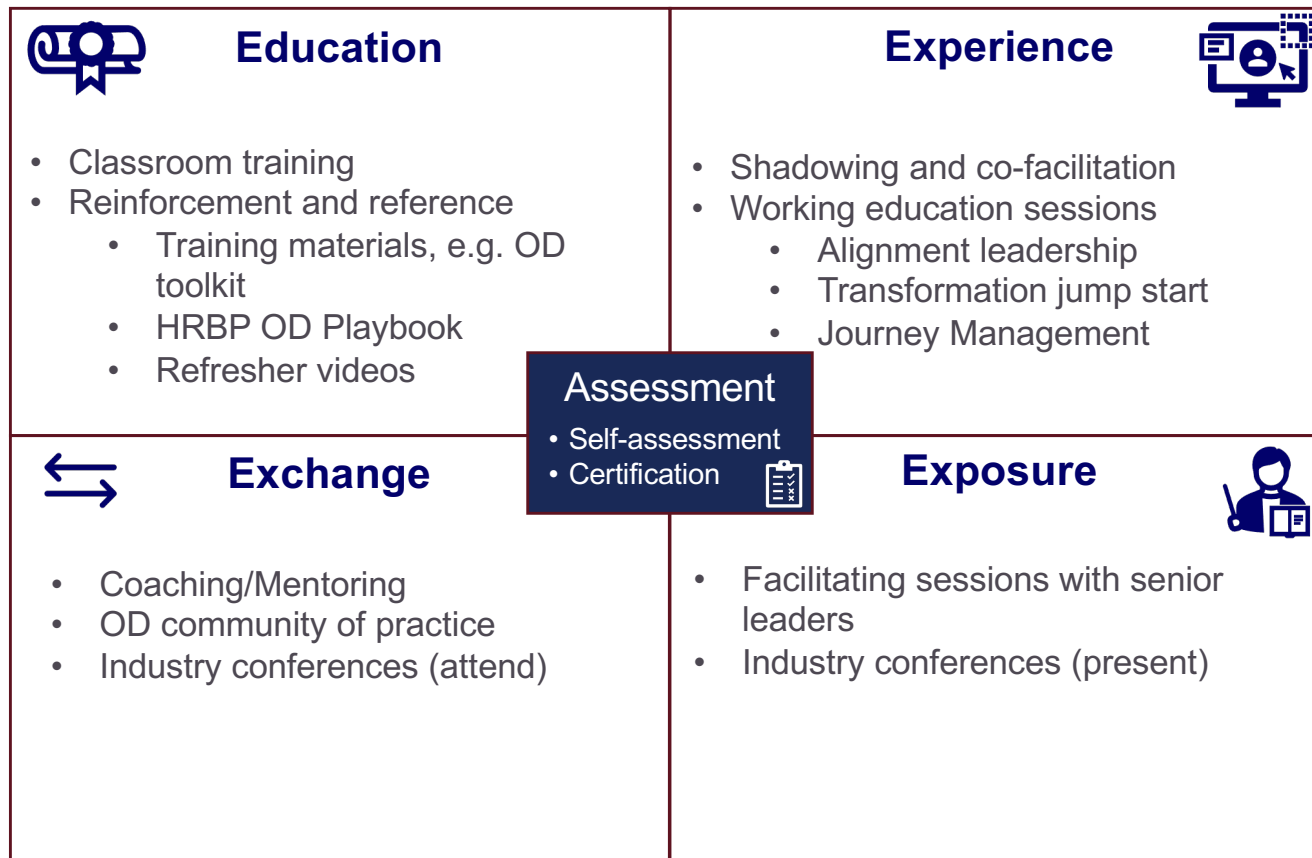
Ongoing Learning & Support





Capability Development Methods

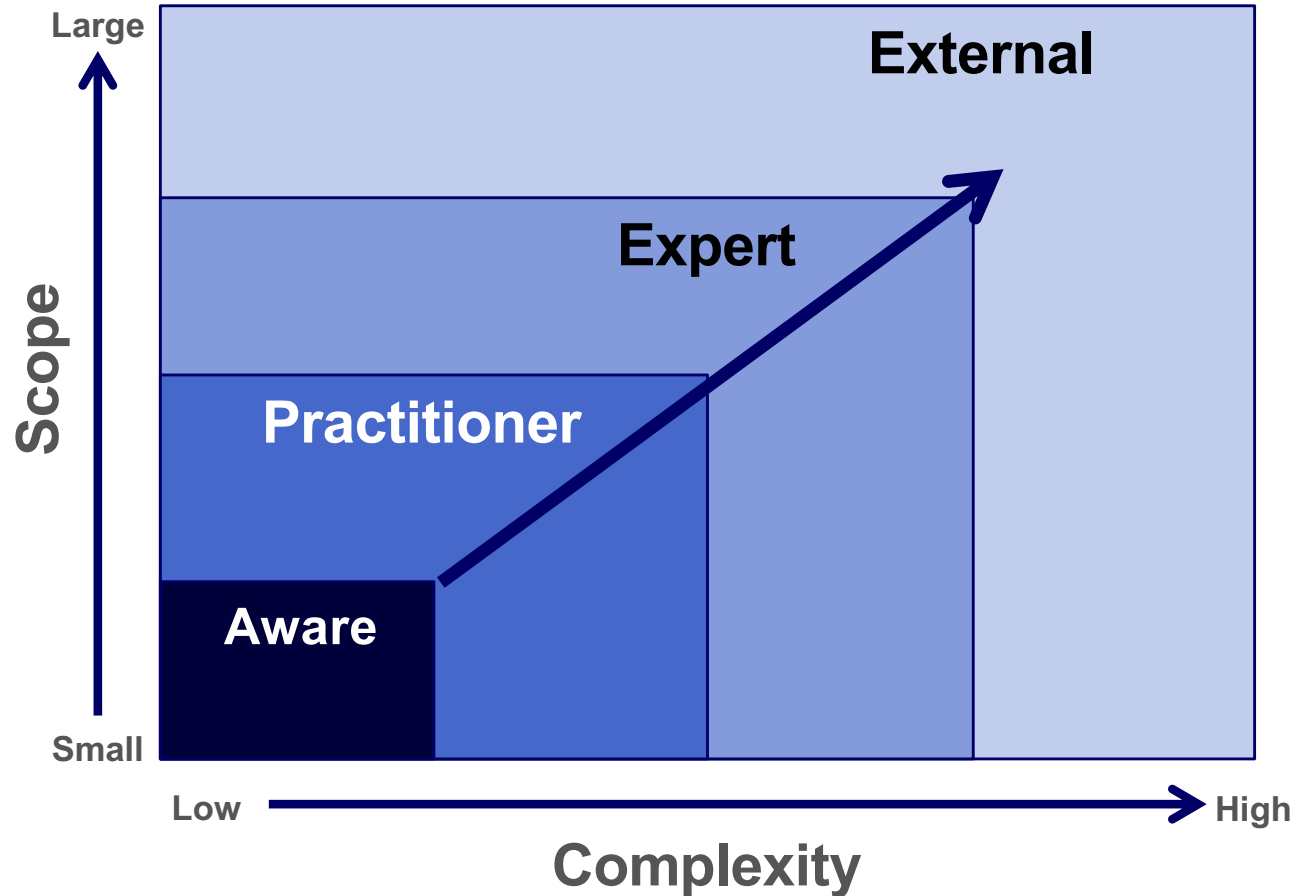
Four E's





Who Should Get What Capabilities?

Matching Capabilities to Complexity



Understanding the scope and complexity of your organization design needs will help you identify the needed level of capability building



Descriptions/Focus Areas for Levels of Skill Development

Levels of Organization Design Skill

	Stage 1: Aware	Stage 2: Practitioner-in-training	Stage 3: Practitioner	Stage 4: Expert
Role	<ul style="list-style-type: none"> • Conversant with organization design language • Understands basic needs analysis • Understands basic organization diagnosis • Able to discuss why and when organization design might be enabled • Able to connect organization design to basic business and function needs 	<ul style="list-style-type: none"> • Able to connect organization design to business and function strategies • Feels comfortable seeking out organization design opportunities • Able to act as a promoter for organization design work • Can integrate numerous types of improvement work • Able to drive implementation 	<ul style="list-style-type: none"> • Works side-by-side with the organization design specialist • Able to facilitate a part of the design process • Able to understand and intervene with group dynamic issues • Work well with line and functional champions 	<ul style="list-style-type: none"> • Able to facilitate a design without a specialist support • May ask for shadow consulting support for further development and risk management • Has sound experience in numerous organization design situations • Personally drives results
Skill Focus	<ul style="list-style-type: none"> • Diagnostics and assessment • Types of interventions • Resource awareness • Charter development • Journey management 	<ul style="list-style-type: none"> • Strategic questions • Systems awareness • Influencing • Integration across boundaries • Design approaches • Implementation 	<ul style="list-style-type: none"> • Design tools • Group dynamics • Assumption revealing questions • Collaboration • Process design • Whole systems redesign 	<ul style="list-style-type: none"> • Analysis • Contracting • Evaluation • Power broker

Stage 1 skills carry forward to the next level, and so forth



Capability Enhancement Model

Learn – Shadow – Co-Facilitate – Lead

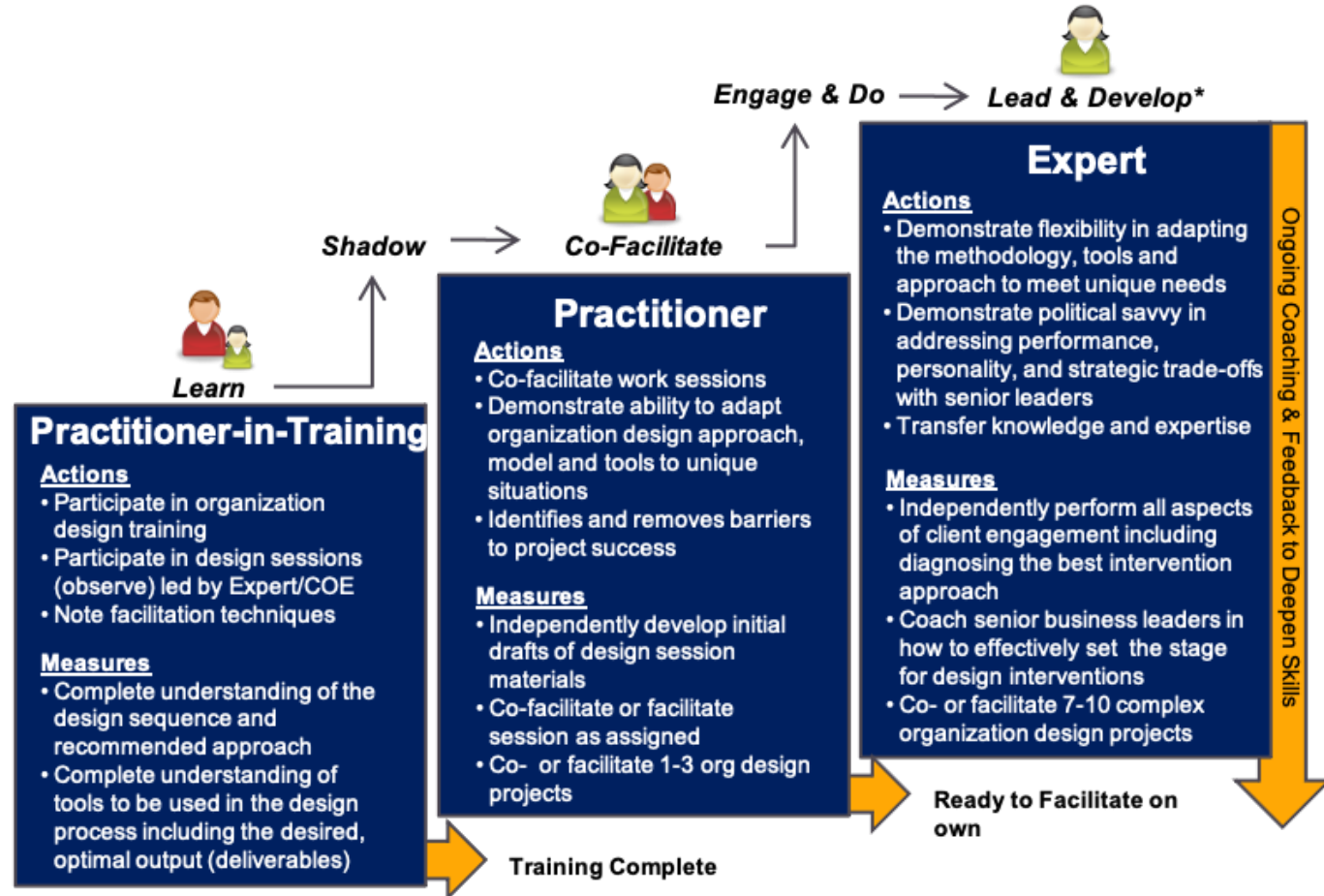
Adult Learning

Theory

1. Experience
 2. Reflect
 3. Conceptualize
 4. Test
- (Kolb)

Characteristics

- Self-Directed
 - Utilizes experiences
 - Goal-oriented
 - Relevancy-oriented
 - Practical
 - Collaborative
- (Knowles)



* Assumes COE resources follow the same developmental path



Roles and capability building methods

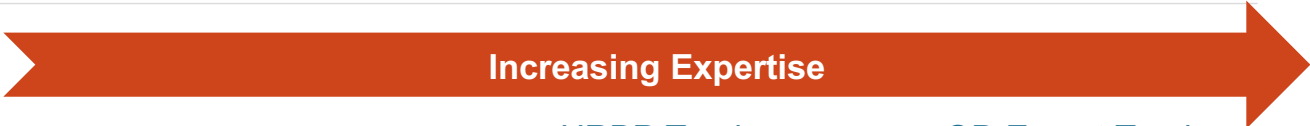


Example

Increasing Expertise	Role	Group	Skills
	SUPPORTER	Business Leaders + Strategy Team	<ul style="list-style-type: none">• Understand how OD can drive business value• Understand their role in OD
	ADVOCATE	HR Leadership Team	<ul style="list-style-type: none">• Guide the business on OD purpose and value• Understand their role in OD
	(PRACTITIONER-IN-TRAINING) USER	All HRBPs	<ul style="list-style-type: none">• Diagnose OD opportunities• Use select tools to drive OD changes
	PRACTITIONER	Select HRBPs	<ul style="list-style-type: none">• Manage medium OD projects• Facilitate medium Macro/Micro design sessions with support from experts
	EXPERT	OD Community:	<ul style="list-style-type: none">• Manage large OD projects• Facilitate large Macro/Micro design sessions
	SUBJECT MATTER EXPERT	Expert Consultants:	<ul style="list-style-type: none">• Manage large, complex OD projects



Learning modules by role

Example

Increasing Expertise 						
Module	Supporter	Advocate	HRBP Track		OD Expert Track	
			P-I-T	Practitioner	Expert	SME
Leadership Role & Organization Design Awareness	X	X				
Organization Design Overview		X	X		X	
Triggers & Diagnosis			X		X	
Targeted Micro Design & Realization Activities			X			
User Application Workshop			X			
Macro Organizational Design					X	
Micro Organizational Design				X	X	
Journey Management				X	X	
Practitioner Application Workshop +1-2 co-facilitated projects				X	X	
+2-4 co-facilitated projects						



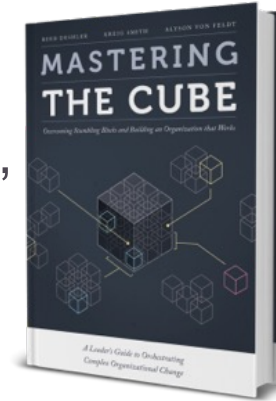
Alignment Leader® & Change Partner: A Dynamic Duo

“Our belief is that all enterprise leaders should consider themselves Alignment Leaders along with the other roles they play.”



“We call this role the **Chief Alignment Officer**...and believe “they must...attend to the health and effectiveness of the[ir] organizations...”

Excerpts From: “Mastering the Cube” by Reed Deshler, Kreig Smith & Alyson VonFeldt



“Leader[s]...should feel the strong support of a **change partner** who can chart a road map for any scale of [change], facilitate discussions, and provide tools for moving firmly and rapidly to build out capabilities across all the six sides of the organizational cube.”





Characteristics of Alignment Leaders® and Change Partners



Alignment Leader...

Makes Choices & Trade-offs

Ensures Alignment

Drives Change

Builds Capability



Change Partner...

Diagnosis

Tools/Process

Thought Partner/Sounding Board

Marks the Path



Shared Access to Toolkits and Other Resources





Organization Design Documents

- Associates throughout the globe need to be able to access a library of materials
- Updates can be pushed through this system
- Documents might include:

Toolkits



Facilitation Decks



Playbooks



Refresher Videos



Knowledge - base of use cases



Informational guides and articles





Online Learning Portal

Self-study Training & Refresher Videos

AlignOrg SOLUTIONS Learning Resources

The AlignOrg Method Overview
Course In Progress
Learn about the Organization Transformation process and the Organization Cube Model.
Continue Course

The Cube Model Overview
Tool
The Organizational Cube Model shows the elements of an organization to consider during transformation initiatives.
Watch Video

Over the last 25 years, AlignOrg Solutions has been helping organizations overcome challenges by following a systematic Organization Transformation Process. We have taken our experience and knowledge and condensed it into six short courses and 27 animated videos to help you with your next transformation initiative.
Each module focuses on a phase of the Organization Transformation Process and includes an overview of the tools used throughout, while the animated videos focus on a specific tool.

The AlignOrg Method - Training and Videos
Leading the Design

1 Diagnosis	2 Strategy	3 Macro Design Development
Diagnosis Course In Progress Learn about the process for identifying the root cause of a problem or organizational challenge. Continue Course	Diagnostic Framework Tool The Diagnostic Framework Tool provides a structured approach for identifying the root cause of organizational challenges. Watch Video	Gap Analysis Tool The Gap Analysis Tool captures the difference between the organization's current and desired results for its key stakeholders. Watch Video
Strategy Clarification Course Learn about strategy and the tools used for clarifying strategy. Continue Course	Stakeholder Requirements Tool The Stakeholder Requirements Tool captures the key project stakeholders and their needs or requirements. Watch Video	Core Motivation Tool The Core Motivation Tool clarifies the purpose and the outcome of a transformation initiative. Watch Video
Macro Design Alignment Course Learn about macro alignment and the tools used for aligning macro design choices. Continue Course	Work Categorization Tool The Work Categorization Tool is used for assessing the strategic impact of organization's work processes and activities. Watch Video	Business Model Tool The Business Model Tool is used to visually show how the organization creates value. Watch Video

Business Model

The Business Model Tool is used to visually show how the organization creates value.



Tool purpose:
Visualise how the organization creates value.

When to use the tool:
During Macro Design.

Use multimedia to deepen learning or supplement design sessions



Request a Learning Portal Demo

The screenshot shows the AlignOrg Learning Portal. At the top, there's a navigation bar with the AlignOrg logo and links for 'Learning' and 'Resources'. Below this, there are three main sections:

- The AlignOrg Method Overview:** A course overview with a 'Continue Course' button.
- The Cube Model Overview:** A tool overview with a 'Watch Video' button.
- Over the last 25 years...** A text block describing the company's history and the systematic Organization Transformation Process.

Below these, there's a section titled 'The AlignOrg Method - Training and Videos'. It features a large blue arrow graphic on the left, divided into three sections: '1 Diagnosis', '2 Strategy', and '3 Macro Design Development'. Each section contains three cards:

- Diagnosis:** Course overview with a 'Continue Course' button.
- Diagnostic Framework:** Tool overview with a 'Watch Video' button.
- Gap Analysis:** Tool overview with a 'Watch Video' button.
- Strategy Clarification:** Course overview with a 'Continue Course' button.
- Stakeholder Requirements:** Tool overview with a 'Watch Video' button.
- Core Motivation:** Tool overview with a 'Watch Video' button.
- Macro Design Alignment:** Course overview with a 'Continue Course' button.
- Work Categorization:** Tool overview with a 'Watch Video' button.
- Business Model:** Tool overview with a 'Watch Video' button.

If you would like request a demo of the Learning Portal referenced in today's webinar, scan here:





Personal Reflection

1. Where is your organization on the development curve for building internal organization design capabilities?
2. How will you build the sponsorship and business case needed to invest in capability building efforts?
3. What additional resources do you need to achieve the level of internal capability you're seeking?

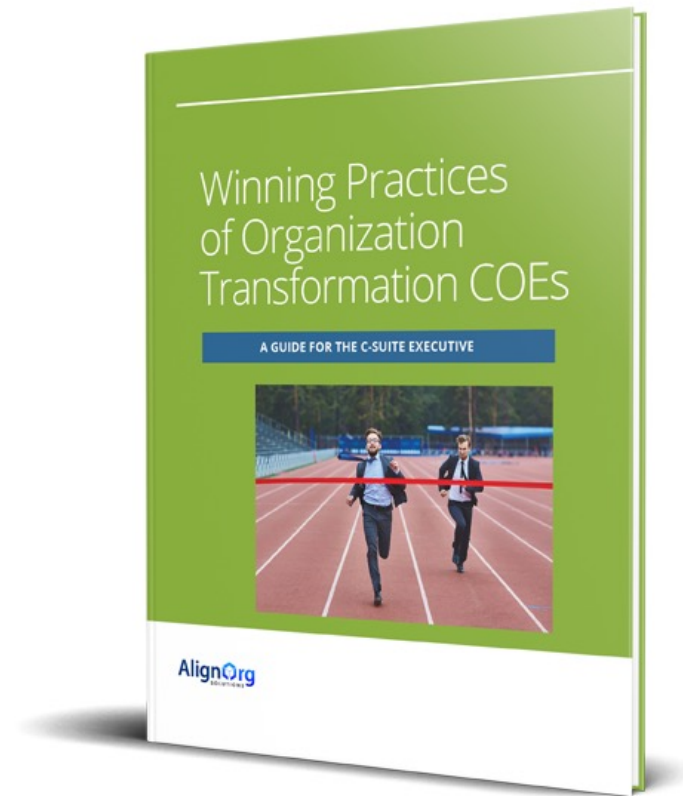




Executive Guide: Winning Practices of Organization Transformation COEs

Winning Practices of Organization Transformation COEs *A Guide for the C-Suite Executive*

Watch your email for the link to this practical guide that can help you build or enhance the effectiveness of your organization transformation capabilities.





AlignOrg Solutions

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Having amassed over 20 years of experience leading projects and change initiatives in multiple industries – including manufacturing, distribution, education, and retail – Doug is an expert at helping organizations become more profitable by aligning work processes, people, and culture to achieve operational effectiveness & efficiencies. He has held senior leadership positions in the areas of IT, Continuous Improvement, Strategy, and Operations.

Doug has developed corporate educational programs and taught thousands of employees all over the world. He is a certified Lean Six Sigma Master Black Belt (LSSMBB), a Project Management Professional (PMP), a certified SAFe Agile Program Consultant (SPC), and a Certified OD Consultant (CODP). He is also a contributing author to the book *Next Level Supply Management Excellence: Your Straight to the Bottom Line® Roadmap*.

Education: BA, Computer Information Systems – Washburn University



Alyson Von Feldt

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Alyson Von Feldt is a consultant, instructional designer, and writer with a 30-year background in strategy and organization design. She has guided major organization design initiatives at enterprises ranging from startups to Fortune 50 companies. She has led design teams aligning structures, workflows, and systems to strategy for-profit and non-profit enterprises.

Alyson is co-author of the book, *Mastering the Cube: Overcoming Stumbling Blocks and Building an Organization that Works* – a guidebook that Clayton M. Christensen of Harvard Business School called, “A great step-by-step manual on defining and changing the design of your company.”

As a trainer and speaker, she’s delivered organization design and change management education to groups ranging from plant floor workers to C-suite executives. She’s created instructional materials such as executive guides, playbooks, and toolkits to heighten awareness and deepen competencies in organization design, change management, and lean six sigma.

Education: Master’s Degree, Organizational Behavior – Brigham Young University