

Leading Organizations Through Successful Transformation Journeys

Webinar

AlignOrg Solutions: What We Do?

A client-focused firm specializing in...

Strategy and Marketplace Differentiation

Diagnosis and Assessment

Organization Design

Change Leadership

Leadership Alignment

To drive differentiation through alignment

Work Breakdown





Thinking drives behaviors and behaviors drive performance.

If you want to **change performance**, you have to change the **way people think**.



Facilitating the Transformation Journey



Initiation

1-2 Weeks

- Charter the implementation work
- Identify team members
- Define roles
- Set-up change structure

Change & Implementation Planning

2-8 weeks

- Assess the changes to work, roles/people, & technology/ tools
- Build the change plan
- Build the process launch plan
- Build the people launch plan
- Build the technology dependency plan

Integrate as the journey management plan

Realization

2-6 months

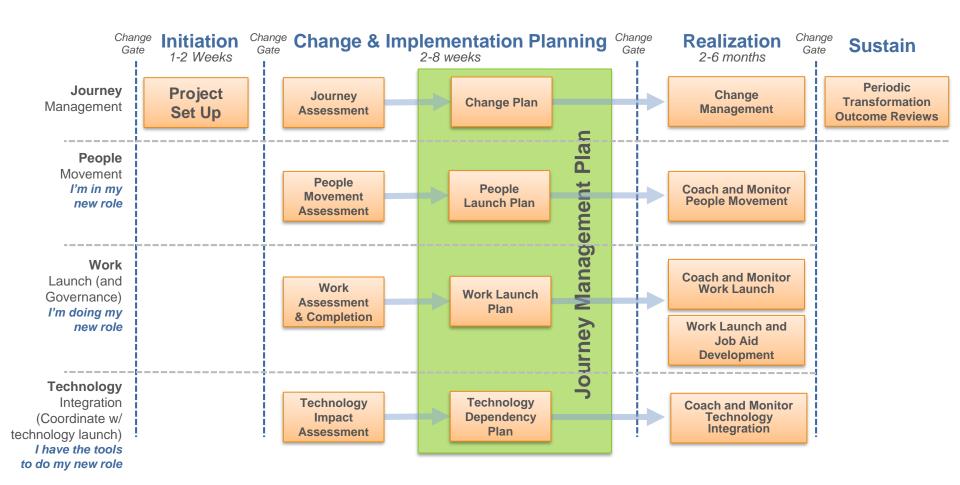
- Develop job aids
- Conduct training
- Transition work and people
- Coach and monitor movements/ transitions

Sustain

- Sustain momentum
- Update and adjust change actions/tactics
- Measure performance



Implementation and Realization Journey Management





Keys to Leading Successful Transformation Journeys

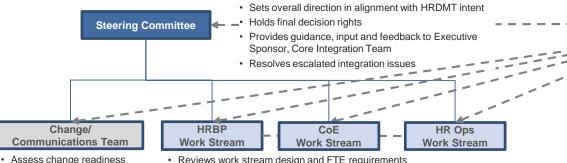
- Proper resourcing and governance
- Accelerating progress with tools
- Differentiating leadership behaviors







Example: HRDMT Change Structure



- Assess stakeholder impacts
- · Develop change & communications plans
- · Develop messaging
- · Coordinate execution of key messages
- · Support leaders with communications to impacted employees/critical audiences
- · Executive change management action plans/tactics
- Monitor and measure change progress

- · Reviews work stream design and FTE requirements
- · Identifies and prioritizes processes and capabilities required to support new structure (who, what, where)
- · Defines key standard work processes, including handoffs
- · Identifies key dependencies and mitigating action
- Validates and refines decision rights
- Collaborates on developing go forward implementation approach
- Helps build detailed implementation plans
- Identifies where Knowledge Transfer would be required prior to changing reporting
- · Recommends success measures
- · Recommends KPIs and service level agreements (day one, after day one Talent Acquisition, ex.)
- Advises on change readiness and change management plans and execution (stakeholder assessment and management, communications, training, etc.)
- Escalates potential integration issues to Core Integration Team
- Serve as change agents and champions for the implementation approach and changes

Expectations of Team Members

- Provide holistic view of area being designed (functional & cross functional business area expertise)
- · Considers options/ideas from multiple perspectives
- · Shares previous and current expertise, ideas and opportunities
- · Change leaders for the future state of HR

Program Planning/Management

Planning & Integration

Core Team

- Plans and sequences overall project events and activities
- · Identifies resources for design team
- Ensures communication, change management and implementation plans are designed and executed
- · Identifies and communicates critical risks, and determines mitigation as needed

Integration

- · Ensures alignment
- · Addresses integration issues impacting work, people & rewards, micro structure, information & metrics
- · Ensures compliance with non-negotiables
- Resolves questions, prioritization and resource constraints
- Addresses staffing or role inconsistencies
- · Flags unaddressed design questions that need to be actioned
- Identify missing linkages
- · Escalates irresolvable integration issues to Steering Committee

Each Transformation Journey requires a unique set of resources, skills, and governance mechanisms



What are the right roles, responsibilities, and expectations?

Role	Responsibility	Time Commitment	Meeting Frequency
Steering Committee	Sponsor Operating Model Transformation Program Ensure proper resourcing to deliver on program expectations and requirements Approve all org / people decisions Deliver SME on impacting issues (compliance, managed services, infrastructure, etc.)		
Executive Sponsor	Manage contracts for external support personnel Partner with OD/Change Lead, Comms Lead, and Project Lead to drive alignment within OMT project Monitor IT employees to determine alignment with activities, learning, etc. Provide supervision of contract support resources Manage financial requirements (i.e. invoicing)		
Program Lead	Manage transformation by ensuring all resources are aligned and engaged on critical build components Provides supervision for all project resources (internal and external) Leads Steering Committee agenda, issues, risk resolution with support Determine resourcing needs for project and present request to Steering Committee Drive roadmaps, milestones and project status updates to provide to Steering Committee		
OD / Change Lead	Partner with internal Project Leader in driving Steering Committee agenda, facilitate SC difficult conversations, partner with sponsor weekly to determine expectations, requirements delivery Lead OD/Change consultants in ensuring delivery of required capability support and capacity add to leaders Partner with Project Leader to deliver one view of the truth and ensure status update are extensive and message critical path Partner with internal Organization Design / Change Management experts in methodology adoption, adaptations, and training support as available		
Strategic Comms Lead	Own all IT strategic communications Prepare the planning, set-up, approval for all communications except manager level team conversations as necessary. (Does provide material for manager cascade of senior level communication events) Partner with senior leaders and work stream leads for areas of IT communications not included in org alignment work		
Work stream Leads	 Review all design, org / people readiness, change, and communications within their work streams Make final decisions on critical issues and determine what to bring to Steering Committee Partner with OD / Change Consultant to determine next steps and approve of critical path Show sponsorship and drive to completion to meet goals and senior leader expectations Monitor employee engagement and provide support for critical managers through the transition 		
Project Manager	Drive roadmaps, timelines, key tasks with work stream leads Partner with OD / Change Consultant and work stream leads in determining next steps, managing expectations, delivering status update reporting for senior leadership Hold owners responsible for activities and develop risk / interdependency reporting and drive to mitigation		
Project Support	Partner with internal work stream leads to deliver requirements of the project Develop change management plans including all employee engagement, retention, training, and knowledge capture and transfer activities Lead managers through huddles, 1-1s, to enable the full employee engagement in supporting the change Lead sessions with senior leaders and managers to deliver design and change plans aligned with operating model and develop all tactical communications Partner with HR in all org / people readiness activities across all work-streams		



Team Definition: Steering Committee

<u>Purpose:</u> Guide the transformation effort and ensure alignment among workstreams

- Sets overall direction in alignment with sponsor intent
- Holds final decision rights
- Provides guidance, input and feedback to Executive Sponsor, Core Integration Team
- Resolves escalated integration issues

Name Area	
	 Other Teams might include: Core Project Team Change/Communications Team Work stream Teams



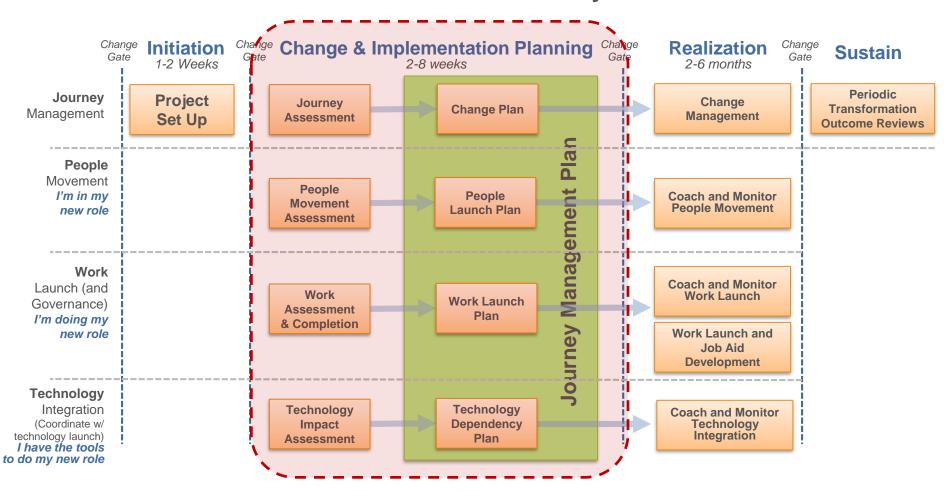
KEY #2: Accelerating progress with tools





Journey Management

Tools Accelerate the Journey





Journey Assessment & Change Plan

Are we ready for change?

Readiness Assessment



Do people understand & are they aligned?

- Core Message
- Leadership Behavior Modeling
- Implementation Success Criteria



What actions need to be taken to obtain buy-in and action?

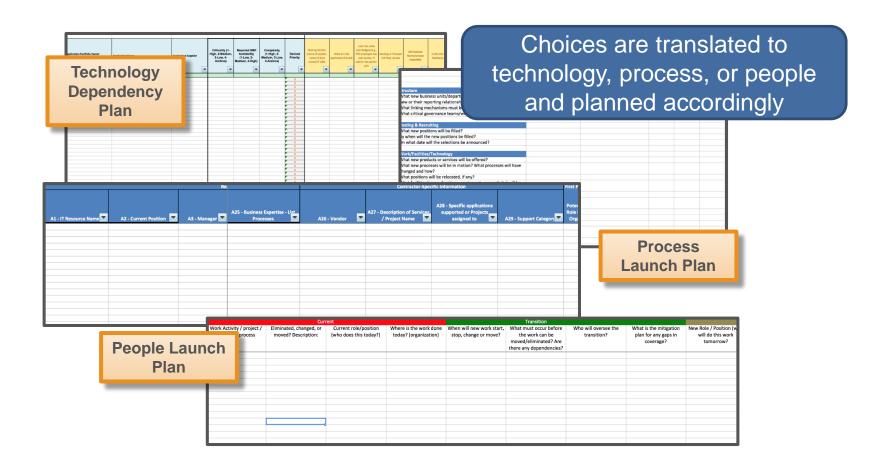
- Stakeholder Categorization & Analysis
- 4-Square Communication



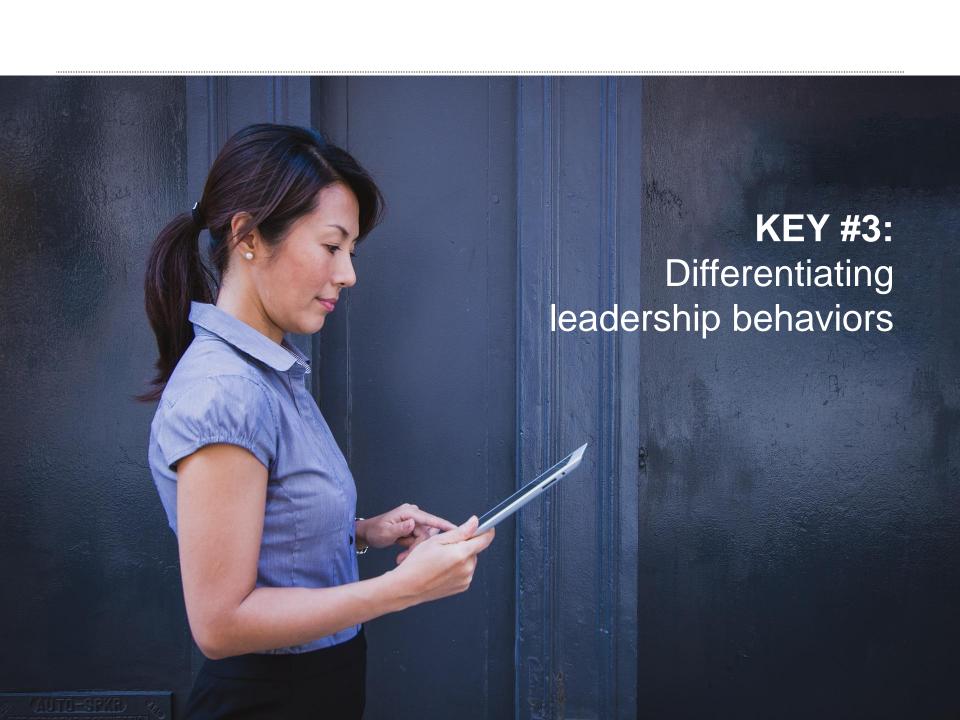
Tools Help with Change Assessment and Management



Data Collection Tools







Real Change Leaders' Competencies

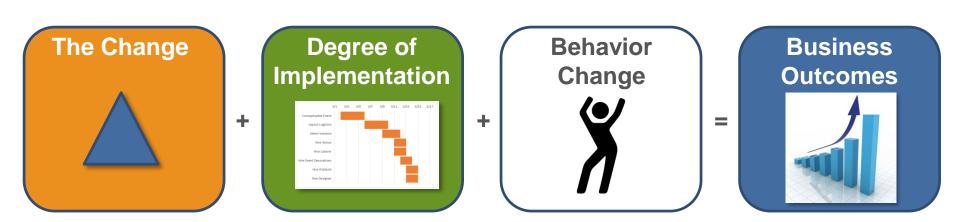
Real Change Leaders:

- 1. Are vision-driven
- 2. Recognize the need for change champions at all levels
- 3. Honor the primacy of customers
- 4. Commit
- 5. Treat change as both logical and emotional
- 6. Model the change they desire in others

Change Change Architect: Innovator: Seeks innovative Connects change to strategic priorities ways to move change forward. and business plan requirements. Real Change Change Change **Facilitator:** Communicator: Leaders Involves and supports Clearly communicates key people in the vision, benefits bringing about and how the influence for change will Change change. take place. **Exemplar:** Acts in accordance with the behaviors called for by the change. Pea/Change Leadership Teams



Measuring Real Change





Periodic Transformation Outcome Reviews: Heat Map

 <i> </i>	Complete n Progress At Risk / Behind Not Started Not Applicable	Diagnosis & Assessment (Do we know what the problem/ opportunity is?)	Strategy & Macro Design (Do we have a blueprint?)	Micro Design (Have we aligned the detailed organizing choices?)	Journey Management (Have we implemented/ installed the design choices?)	Behavior/ performance changes (Has behavior/ performance changed in a noticeable way?)	Action Planning
	Organization			-	-	-	
	Design Area #1			-	-	-	
	Design Area #2				+	+	
	Design Area #3			-	-	-	
	Organization			+	+	+	
	Design Area #1				+	+	
	Design Area #2			+	+	+	



Good Progress

The Situation: A national financial services firm with 30,000+ employees

Their Challenge: Redesign the corporate Human Resources function to

support company growth while containing costs

3 Keys to Success:



Proper Resourcing & Governance

- Right knowledge on project team
- Strong connection to internal communications and change management teams
- Steering Committee to facilitate rapid decision making

Tools

- Stakeholder Categorization and Analysis
- Project Planning & Updates

Differentiating Leadership Behaviors

- Aligned Leaders
- Aligned Communications



Personal Reflection

- Reflect on how your organization's transformation efforts:
 - How well are you planning for and guiding the transformation journey?
 - Are you achieving sustainable change in people's behaviors/performance, process execution and technology capabilities?
- 2. How can you adopt leadership practices that will ensure successful journey management?



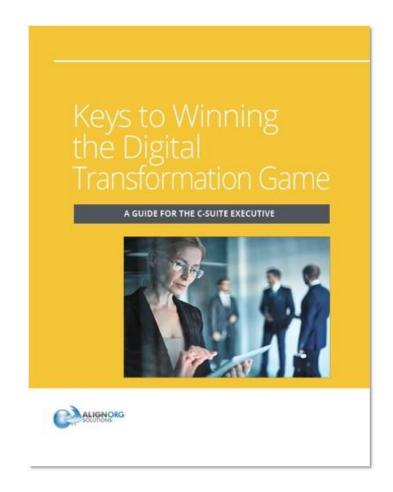


Thank you! Questions?

Be sure to download our newest Executive Guide:

Keys to Winning the Digital
Transformation Game
A Guide for the C-Suite Executive

Watch your email for this practical guide.





Today's Presenters



Reed Deshler, is an organization catalyst. He works with executive teams and human resources teams to define winning strategies, align organizations and business models for success and mobilize employees in the desired direction. A change leader, organization design expert and principal of the management consultancy AlignOrg Solutions, Reed

brings multi-dimensional business models to life for Fortune 500 companies, middle-market businesses and non-profits so they can align strategy with operational reality.

Reed is coauthor of <u>Mastering the Cube: Overcoming Stumbling Blocks and Building an Organization that Works</u>, a guidebook that Clayton M. Christensen, professor at the Harvard Business School calls, "a great step-by-step manual on defining and changing the design of your company."

Reed has guided numerous Fortune 500 companies — including Tyco, 3M, Abbott Laboratories, Hertz, Cummins, Cisco, and USAA — through change successfully. When companies are looking to propel growth through organizational transformation they call on Reed and his team. reed.deshler@alignorg.com



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Kelly Schnur is a management consultant and executive coach. She brings 30 years of senior executive, operations and human resources experience to advising corporate and non-profit leaders on how to align talent, process and technology in order to execute business strategy. Kelly's strengths

lie in her ability to quickly discern the challenges facing an organization and its leaders and to provide concrete solutions for achieving business or mission driven goals.

Past projects have included working with business unit leaders to streamline operations and scale for growth, facilitating strategic planning and leadership development meetings, leading merger & acquisition teams in merger, due diligence and integration strategy, creating succession and talent development plans, and building core operations for start-up non-profits.

She holds the Senior Professional in HR (SPHR) certificate and is an ICF certified executive coach. In addition, she has held several non-profit board positions. kelly.schnur@alignorg.com



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