



Organizational Design

Developing your organization as a whole-system

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INTRODUCTION

We've all heard the phrase, "the left-hand doesn't know what the right-hand is doing." If this is a commonly muttered phrase within your organization, consider whole-system organizational design.

We provide a holistic look and solution for your business. Looking at all of the functional/operational areas to identify:

- Overlooked operational inter-dependencies
- Connection points, commonality, internal and external hand-offs, as well as creating and sustaining great employee and customer experiences. Establishing consistency within your organization is highly important for both employees and customers.
- Important functional areas that require tighter processes vs. those areas where looser, employee driven processes are OK.

Whether your organization is in a start up phase, in expansion, or in the throws of a large change, organizational design is the way to set up your business for success.



Surprisingly, a lack of good, structured, documented processes is a significant source of organizational conflict. Use organizational design to document your processes and reduce unhealthy conflict.



PRODUCT/SERVICE/METHODOLOGY

We carefully and methodically document each process within your organization to find connection points. Documentation can include swim lanes, written procedures with rationale, and policies. In high-quality areas, this can also include document control to ensure that changes are made only with full knowledge and consent of the organization.

Next steps include carefully creating matrices that detail who needs to what learning and using the appropriate learning modalities to educate the right people with the right information. RACI matrices are also helpful in ensuring that communication remains consistent. This is very valuable for new team members as well!

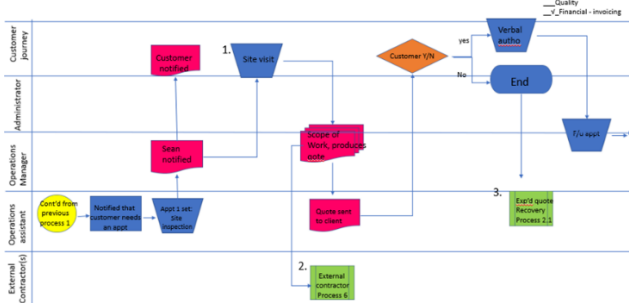
With these important documents developed, the team will then begin to evaluate the degree of learning materials that are necessary for success. This might include learning for existing or new team members. Job-aids, computer screen shots, documents, photos, among many other items are important parts of this material as well. Typically, team members or operational areas will receive complete binders of material to ensure just-in-time learning for those processes that are not commonly used.

Finally, preparing a full-suite of materials for new team members and contractors is a great part of your organizational socialization practice. This is a sure-way to set up your new team members for success from day one!

KEY FINDINGS

Key Findings #1

Identification of scale-able considerations, redundancies, and bottlenecks.



Once your organizational current processes are clearly documented, it becomes much easier to identify areas that may contribute to or inhibit organizational scalability along with other, yet unidentified issues.

Key Findings #2

Identification of organizational learning and role stress reduction.

A lack of documented processes leads to role stress, a “who’s on first and who’s on second” type of scenario. This degree of role confusion or role stress is one of the greatest contributors to a lack of organizational commitment.

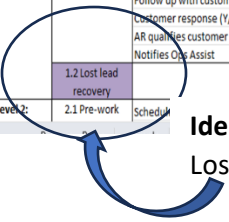
Training is expensive. Once roles are mapped to processes, it becomes very easy to identify organizational training needs: getting the right training to the right team members at the right time.

		Role - Process matrix							
		Use to identify training needs and role conflicts							
		Adaptive Roofing				external operations: subs & customers			
		Dept/unit							
Project specific notes:									
Process level	Process	Activity	Ops Manager	Ops Assist	Administrator	Other	Customers	Sub Contractors	Other
Level 1: Initial customer engagement	1.1 Customer engagement	Customer contacts Adaptive Roofing							
		Lead generates through Review Revolution		X					
		Download electronic documentation		X					
		Ops Assistant passes documentation to Ops manager		X					
		Follow up with customer (Y/N)		X					
		Customer response (Y/N)						X	
		AR qualifies customer (Y/N)		X					
Notifies Ops Assist		X							
Level 2:	2.1 Pre-work	Schedule customer appointment		X					

Key Findings #3

Easily introduce new processes or even operational areas.

Process level	Process	Activity	Ops Manager	Ops Assist	Administratic	Other	Customers	Sub Contract	Other
Level 1: Initial customer engagement	1.1 Customer engagement	Customer contacts Adaptive Roofing					X		
		Lead generates through Review Revolution		X					
		Download electronic documentation		X					
		Ops Assistant passes documentation to Ops manager		X					
		Follow up with customer (Y/N)		X					
		Customer response (Y/N)						X	
		AR qualifies customer (Y/N)		X					
Notifies Ops Assist		X							
Level 2:	2.1 Pre-work	Schedule							



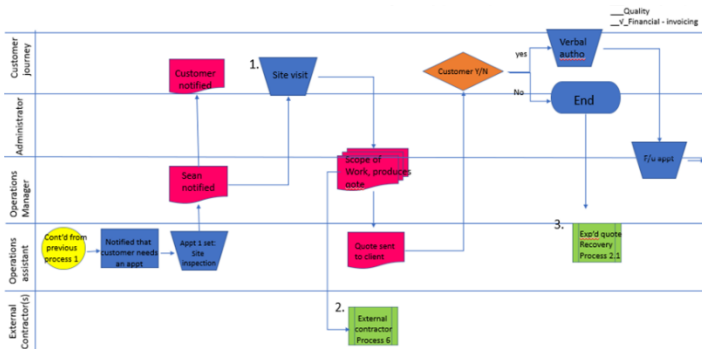
Identified, future process need:
Lost lead recovery

As your organization grows, it becomes very easy to introduce new operational areas into an existing system. New operational leaders will know the processes that do exist, minimizing the frustration that comes with an organizational change.



Visual Data

Process mapping



Process Maps:
 Process mapping, or swim lanes, provides a clear, visual representation of your organizations work processes. The mapping can also provide an indicator of necessary policies.

Role to process matrix:

Role to process matrix:
 The role to process map converts the individual processes by roles to identify the need for documentation materials, training, and sub-contractor materials.

Role - Process matrix							
Use to identify training needs and role conflicts							
Project specific notes:			Adaptive Roofing Dept/unit		external operations: subs & customers		
Process level	Process	Activity	Ops Manager	Ops Assist	Administrator	Other	Customers
Level 1:	1.1 Customer engagement	Customer contacts Adaptive Roofing					X
Initial customer engagement		Lead generates through Review Revolution		X			
		Download electronic documentation		X			
		Ops Assistant passes documentation to Ops manager		X			
		Follow up with customer (Y/N)	X				
		Customer response (Y/N)					X
		AR qualifies customer (Y/N)	X				
		Notifies Ops Assist	X				
Level 2:	2.1 Pre-work	Schedule customer appointment		X			

Provide clear, visual documentation for your team members, especially helpful for new team member socialization!



CONCLUSION

There are tremendous benefits from engaging in organizational design. In addition to ensuring that all of your functional areas are operating at full capacity, consider the following, it:

- Helps to alleviate hidden factories, operational silos, and work-arounds.
- Documents processes to promotes mentoring, rounding, and/or GEMBA walks
Socializes new team members more effectively
- Provides just-in-time organizational learning
- Alleviates role stress
- Sets up clear expectations around important processes
- Aids in easier integration for new operational areas as your business grows
- Easily identifies the five areas where consistency is a must and areas where team members can bring in their own ideas to promote innovation and improvement.
- Improves communication as your team members understand their role within a system.

Key Takeaways

- Identification of scale-able considerations, redundancies, and bottlenecks.
- Identification of organizational learning and role stress reduction
- Easily introduce new processes or even operational areas.

What can Archetype Learning Solutions do for your organization?

Most consultants have their tried-and-true tools, or an archetype, in their approach. Your organization is itself an archetype which is why your organization needs a solution as unique as it. Lets connect! We can help create a whole-system organizational design to bring you these great benefits.