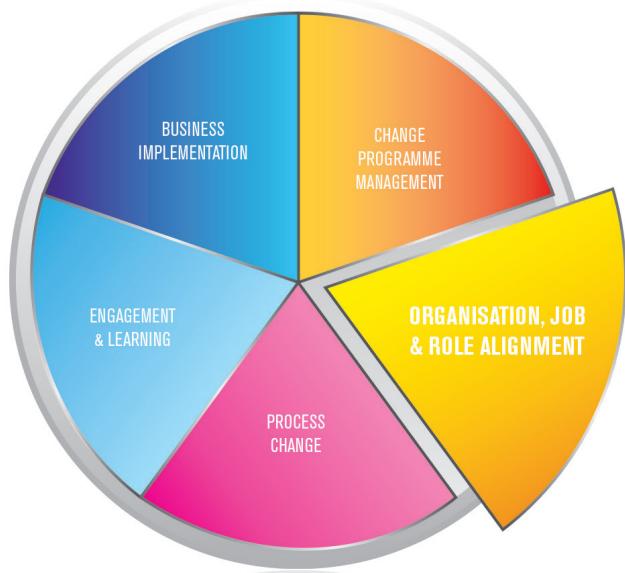


ORGANISATION, JOB AND ROLE ALIGNMENT



ORG 1 - ESTABLISH GOVERNANCE FOR DECISIONS

GET EVERYONE IN THE MOOD FOR DECISION MAKING. AGREE THE MECHANISMS

For those areas of the organisation that need to change, there will be strong opinions about what the final structure should look like. This is an area where politics can take over and undermine the best options for the company as a whole. In some cases, a whole new organisation design will be required. A good solid process for getting the key players around a table and making decisions is critical.

ORG 1 - Create a single log where the key decisions that need to be made are recorded, and the progress of these are tracked. If a new organisational structure is being introduced, conduct discussions with the leadership team using the model to identify where decisions will need to be made in terms of where key tasks are performed. Book recurring meetings where options can be discussed and key decisions can be formalised.

THE ORGANISATIONAL GOVERNANCE MODEL & DECISIONS LOG

The decisions log records where specific decisions need to be made and who needs to make them. An initial meeting is conducted with the key decision makers to agree the approach and to create a common set of criteria which is used as a basis to make all decisions. (e.g. Company objectives, corporate guidelines on spans of control). All decisions should meet these criteria.

Key Decision Log								
Decision No	Org Ref	Key Decision / Assumption	Key Impacts	Dept 1	Dept 2	Dept 3	Dept 4	Other
Signed off at the meeting on 30th May 2012								
2	5.10	Should reporting be conducted locally or centrally, or spread across IS, Finance and Procurement	Existing "As Is" reports will form the basis of activity in the short term. Limited headcount reduction will be achieved until new systems are introduced.	g				
4	6.00	Should master data be centralised. Decision to centralise in Finance.	FTE movements but no operational impacts.				a	a
Outline the decision required or the assumption which requires confirmation. If there are options defined, summarise them here								
Summarise the impacts of each of the options for each stakeholder area. This will enable a balanced, considered decision to be reached								

Key decision not agreed
a Key decision agreed but not signed off by individual
g Key decision signed off

ORG 2 - REDESIGN ORGANISATION AND ROLES

ACTIVITIES MAKES ROLES. ROLES MAKE JOBS. JOBS MAKE ORGANISATIONS.

At a basic level, an organisational chart shows us how activities have been divided off across an organisation. Jobs and roles tell us which activities people will own when they come into work every day. As we redesign the organisation, we are constantly looking at how future activities will need to be performed by today's, or future roles. These should be driven by the need to meet the expectations of all customers and stakeholders Service Level Agreements (SLAs).

ORG 2 - Create a matrix which takes the future state activities that will need to be performed and map them to the teams that are present today, or new teams, if determined. Map all activities to existing or future teams in order to figure out how to allocate activities within a team. Use a workshop approach to determine who the team is in existence for (the stakeholders and expectations of the team), what criteria to use when allocating roles (e.g. maximise multiskilling, segregation of duties) and how roles need to map to activities.

ROLE PROFILING APPROACH

The activity to role matrix can be used at a number of levels to layout the emerging organisational design. A workshop based approach very similar to the governance used at ORG 1 is applied on a lower level to make role decisions.

Activity to Role Mapping Version 1.0		Scope of work	Time	Current Responsibilities								
Process Model Ref	Process Model Ref	Understand and Plan	Plan and Outcome ref	AP2 Scope	Time - current	Time - Period spend	AP Team 1	AP Team 2	AP Team 3	AP Team 4	AP Team 5	AP Team 6
Procure to Pay							X	X	X	X	X	X
Request of Goods or Services							X					
Request of Goods or Services								X				
Process Supplier Invoices									X			
Process Supplier Invoices										X		
Procurement Accounting										X		
Maintain Vendor Master File											X	
Bill to Cash	Billing						X	X	X			
	Customer Payments Process							X				
	Process Receipts								X			
	Customer Accounting									X		
	Debt Recovery										X	

Map each activity to a role within a team.
Consider the creation of new roles as required

Breakdown of key activities required to fulfil the process

This table should reflect the future-state mapping

ORG 3 - DEVELOP ROLES LAYER BY LAYER

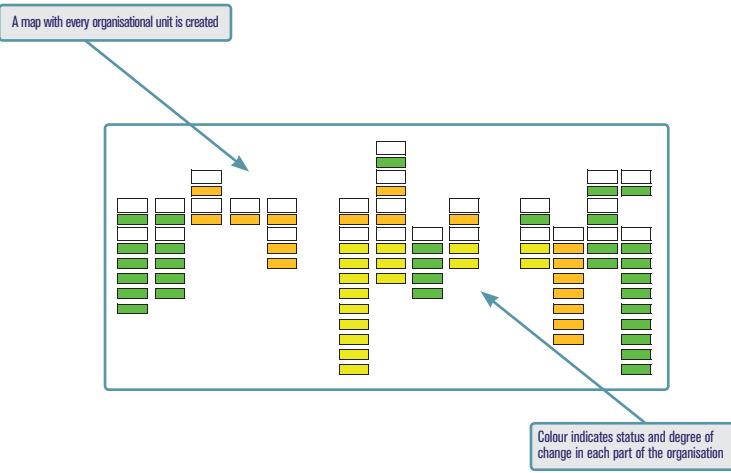
FOR EACH LAYER, MAP ROLES TO PEOPLE AND PLAN FOR IMPACTED AREAS

For organisational changes that impact a whole department, the best way to handle the design is to design and recruit the top level, and then involve them in the design and recruitment for the layer below. Repeat this as we move from Director to staff level. This takes longer than a 'big bang' restructure, but maximises involvement and accountability for the new operation.

ORG 3 - Create a plan which will cascade the organisational restructure top down, following a broad pattern of: activity design; organisation and role decision making announcement; and then implementation for each level. Use the governance mechanisms to make decisions at each level, and the activity to role matrix to drive out where new roles will be required. In a secure room, build up an organisational chart to show impacted areas (e.g. new teams, 'lift and shift' changes) and use them to drive decisions and progress.

CASCADE APPROACH FOR IMPACTED BUSINESS AREAS

Some operating model projects have defined activity for organisational changes, but it is good practice to structure the organisation layer by layer. A visual representation to show the evolving organisation is a great way to engage decision makers and HR.



ORG 4 - MONITOR HR ACTIONS FOR IMPACTED AREAS

USE ROLE PROFILES TO EXPLAIN, FORMALISE AND TRACK CHANGES

Role profiles are used to recruit staff into positions, either from external or internal sources (from other departments). Organisations will use specific standards To document these, and follow a HR defined process before, during and after recruiting staff. As the organisational structure is finalised, it becomes important to track the progress of these activities, taking into account any timelines.

ORG 4 - Document role profiles with the Leadership team and work with HR to ensure role profiles meet company standards and are benchmarked for salaries and benefits. Create a tracker to monitor all the assessment, recruitment and HR activities which need to be performed by various stakeholders, keeping track of progress on a daily basis. Ensure all stakeholders are aware of the activities that they are responsible for.

HR ACTIVITY STATUS TRACKER

The HR tracker records the activities to be performed to recruit staff into the organisation, and tracks progress daily. The new structure, with new role titles, are shown with the HR activities.

This can also be used to monitor assessment activities.

Be specific with required actions and continue to drive progress

POSITION STATUS AND NEXT STEPS

FILLING THE POSITION

HR Activity Status Tracker		Name	Status	Action	Next step date	Decision Maker	Decision Date
SSC Manager	VACANT		RECRUIT	Interview with Simon		SI / TM	
Cash Manager	VACANT						
Cash and Bank Accountant		Jon Davis	INTERNAL				
Cash Associate		David Jones	INTERNAL				
Cash Associate		Peter Jonson	INTERNAL				
Cash Associate		Bruce Helder	INTERNAL				
Cash Associate		Mike Jones	ACTION	Need to define the profile			
Cash Associate		Peter Piser					
Cash Associate		Jane Jones					

Colour coding gives an indication of the overall status at a glance

ORG 5 - LAUNCH AND MONITOR HANDOVER

USE VISUAL TECHNIQUES TO TRACK KEY HANDOVERS OF ACTIVITIES

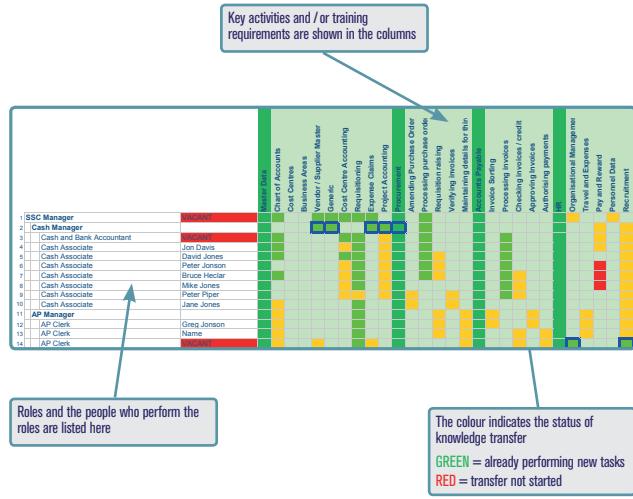
Team activities and staff members may have changed as a result of the organisational changes. Where changes have occurred, knowledge has to transfer from one individual to another. This takes time, so mechanisms have to be put in place to ensure the key activities are learnt and everyday business requirements do not suffer.

ORG 5 - Work with Leaders to document the critical activities and system knowledge that need to be learnt or transferred by the team. Identify staff members in the organisation who are experts in each activity and identify which team members are required to learn which activities.

Monitor and track the ongoing status of the activity transfer for all individuals involved.

THE KNOWLEDGE TRANSFER TRACKER

The Knowledge Transfer Tracker monitors each staff member and their understanding of the activities for which they will become responsible. Individuals are mapped against activities in the form of a matrix, with a simple colour-coding system used to provide a visual representation of progress.



JOB 1 - IDENTIFY MAJOR HR AND ORGANISATIONAL IMPACTS

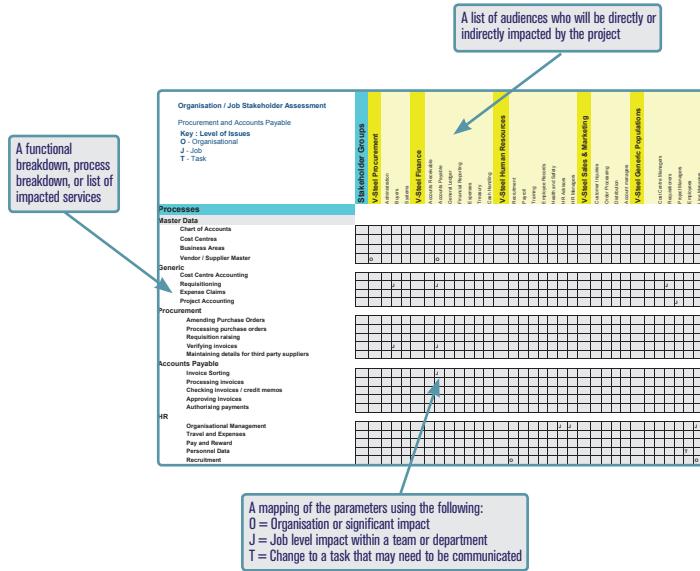
LAY OUT THE IMPACTS ON A MATRIX. WORK ON THE MAJOR IMPACTS IMMEDIATELY

The chances are that you will have entered the project at quite a late stage and already have some change management issues to deal with. It is important to apply a rigorous approach to make sure that any organisational or job related issues are identified. It is also vital that any issues with a long lead time (recruitment, union related) are acted on fast.

JOB 1 - Work with the process team members or subject matter experts to build up a picture of the total processes, services or functionality that will be impacted. Talk to people who understand the business or countries impacted about who the audience groups are. Map the two on a matrix, and conduct discussions to identify the level of change for those audiences, and in particular, the issues which need to be sorted out now, or will take longer.

THE OJT MATRIX

You should conduct practical discussions around the Organisational, Job, Task (OJT) matrix template. This will ensure that a full scope of issues are understood. Significant organisational issues which impact a number of teams are addressed in the ORG section.



JOB 2 - CONDUCT A JOB IMPACT ANALYSIS

WORK OUT WHAT NEEDS TO BE DIFFERENT WHEN KEY ROLES COME INTO WORK EVERY DAY

Every time a project is delivered, there are people affected who will need to come into work and do something different. Work out who they are, how they are impacted, and what needs to change, and people will be aligned. A good job impact analysis will cover changes to accountabilities, relationships, objectives, workload, skills and competencies for key roles inside and outside the organisation.

JOB 2 - Use the OJT matrix to work out where there are key roles impacted by the changes. Facilitate a discussion with people who can describe the future processes or services and who can talk through each piece of the future state design. During this discussion, use people who understand how things work today to identify the key impacts. The job impact checklist is a list of key questions that can be used to identify where changes to key roles will be required.

THE JOB IMPACT WORKSHOP CHECKLIST AND NOTEPAD

You should conduct practical discussions around the OJT template. This will ensure that a full scope of issues are understood. Significant organisational issues which impact a number of teams are addressed in the ORG section.

These documents allow us to ensure that all the aspects of key roles have been considered in terms of impacts

Job Impact Checklist Helpsheet Version 1.0	
Tasks and Procedures <input type="checkbox"/> 1. What tasks will the department no longer perform? <input type="checkbox"/> 2. What new tasks will be required? <input type="checkbox"/> 3. What tasks will be changed (e.g. Automation, changes to systems) <input type="checkbox"/> 4. Will any deadlines change?	Organisational Impact Notepad Process / System Function Organisational
Responsibilities <input type="checkbox"/> 1. Who will be responsible for what? <input type="checkbox"/> 2. Will the role be lost? <input type="checkbox"/> 3. Are there any new responsibilities?	Job and Role
Relationships <input type="checkbox"/> 1. What new relationships? <input type="checkbox"/> 2. What relationships change? <input type="checkbox"/> 3. What relationships end?	Training and Engagement
Skills and Competencies <input type="checkbox"/> 1. What new competencies? <input type="checkbox"/> 2. Are there behavioural changes? <input type="checkbox"/> 3. Are there any changes to skills? <input type="checkbox"/> 4. Are there any changes to competencies?	
Objectives and Measures <input type="checkbox"/> 1. Which of our current objectives will change? <input type="checkbox"/> 2. Do we need to add new ones? <input type="checkbox"/> 3. Do individual objectives change?	
Volumes <input type="checkbox"/> 1. Do the processes increase? <input type="checkbox"/> 2. Do the processes decrease? <input type="checkbox"/> 3. Do the processes change?	
Behaviours <input type="checkbox"/> 1. What new behaviours are required? <input type="checkbox"/> 2. Are there any critical behaviours? <input type="checkbox"/> 3. What behaviours change?	

We use this document to identify and record changes to:
- Accountabilities
- Responsibilities
- Relationships
- Skills and competencies
- Objectives and measures
- Volumes
- Behaviours

JOB 3 - PLAN AND MONITOR BUSINESS AND HR ACTIONS

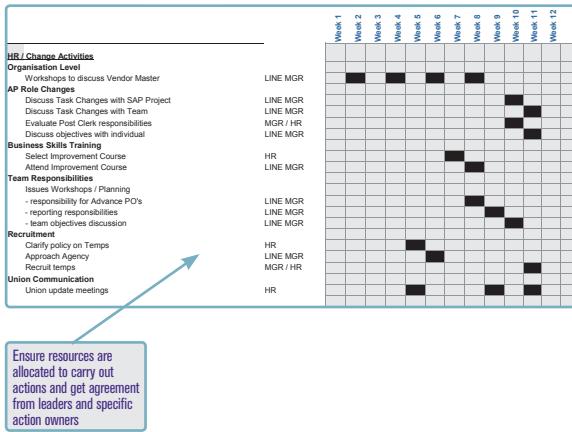
MAKE A PRACTICAL, DECISIVE PLAN FOR EVERY IMPACTED AREA

How many times have you been in a meeting where issues have been agreed, but no actions were followed up. This stage is all about making sure that we are clear on which impacted roles need action, and on what specific changes need to be planned in the impacted areas. Actions may also include the need to make specific decisions about responsibilities. It has to be owned by leaders of impacted areas.

JOB 3 - Conduct meetings with local business contacts to agree which local actions are needed to make the changes. Record them on a business action plan. If decisions are required, agree the process for making them, and the required dates for resolution. These actions will contain changes that local leaders need to make, local training courses, local HR actions and local communication tasks.

THE BUSINESS ACTION PLAN

The format of the template can vary, and in some cases, these actions are contained within a Business Readiness Checklist or Business Implementation Plan. They should contain local actions including team communication, local training and local HR activities.



JOB 4 - ENGAGE LEADERS TO DELIVER ACTIONS FOR KEY ROLES

FOR THE KEY IMPACTED ROLES, CREATE PRACTICAL HANDBOOKS TO SUPPORT CHANGES

To make the local changes, operational managers will need an understanding of the new processes or services in a clear format. For significantly impacted roles, create a role based format which is similar to a job profile, but contains information about the aspects of the roles that need to change. This information can then be used for activities, including assessment of people for positions, employee development activity and changes to objectives.

JOB 4 - Setting up a role handbook format for highly impacted roles allows us to communicate the future state design in a format which can make direct changes to people's jobs and roles. If the impacted areas or HR already use job or role profiles, these can be used as a starting point. Work with those who understand the new processes or services to document the aspects of the key roles which will need to change, and use this information to brief leaders, HR or learning solution providers so that the impacts can be resolved.

THE ROLE HANDBOOK

The role handbook summarises what to focus on when performing a role. Only relevant sections are developed, but in some cases the whole document is used to assess people for new roles, where significant changes are required.

Sections cover accountability, objectives, competencies, skills, volumes and behaviours.

Purpose of this document

To maintain standards and consistency and to explain what we do to others. It is important that we document our ways of working.

The role handbook not only allows us to understand what responsibilities we have in terms of our own responsibilities and working relationships, but also in terms of the competencies and skills we need to perform our day-to-day work.

You should use the handbook to understand the roles of your own or other departments. Specifically, this will require an understanding of the following:

- The responsibilities and accountabilities of a particular role
- The working relationships and dependencies to and from other departments
- The key tasks and processes performed by the role
- The technical skills and competencies required to perform the role
- The behavioural / interpersonal competencies required
 - Standard behaviour 'do's' and 'don'ts' and basic rules
 - The systems and reports used by the role in the day-to-day work.

Accountabilities

The primary accountability of this role is to ensure the successful matching of purchase invoices and the

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Version 1.0

Role Handbook

Page 1 of 6

Designed to help impacted roles understand specifically what they should do following go-live

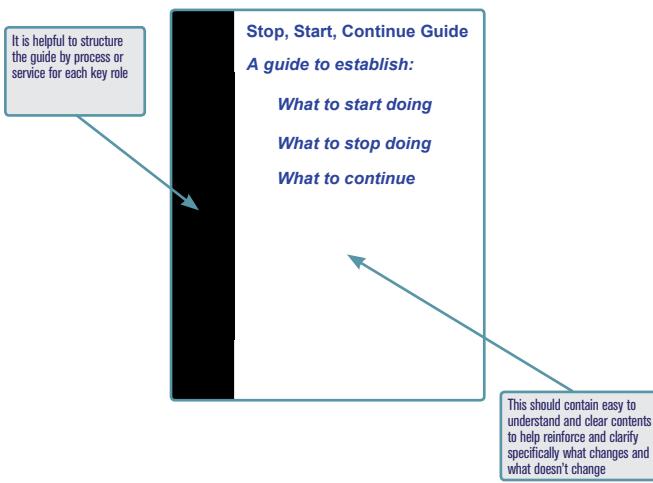
JOB 5 - MAKE THE CHANGES AND EDUCATE KEY ROLES

STOP. START. CONTINUE.

After the Go-Live, it is vital that every role is clear on the new ways of working in terms of what has to stop, start and continue. Using role based formats, is a great way of targeting messages to specific individuals. Using key individuals such as leaders in cascading this information is also a great way of ensuring ownership of the changes.

JOB 5 - From an early stage of the project, you can set up templates to capture the stop, start, continue messages for key roles impacted. The actions can refer to process changes, reporting changes, changes to points of contact, or practically anything that has changed. At an early stage of the project, we can use these to capture role based communication messages. During and beyond the Go-Live, it provides a simple, often last minute format for communicating operational messages.

THE STOP, START, CONTINUE GUIDE



ENGAGEMENT AND LEARNING

KEY ACCELERATORS

Use these accelerators to plan, manage, deliver and evaluate great communication, engagement and learning events.

ENG 1 - Assess audience needs

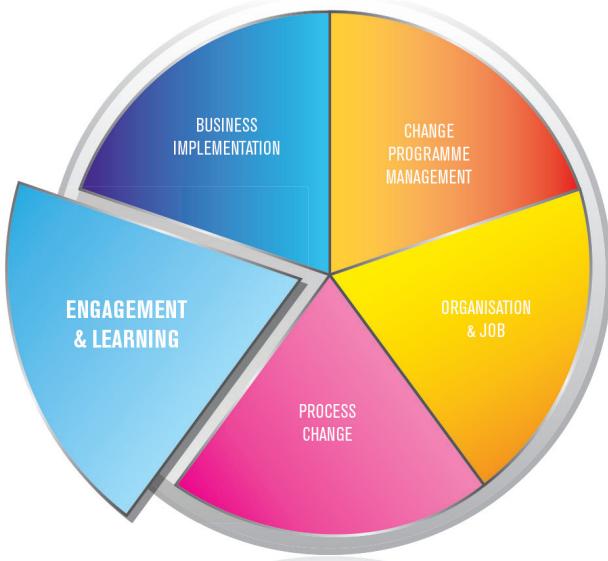
ENG 2 - Confirm strategy and approach

ENG 3 - Confirm catalogue, standards and environment

ENG 4 - Prepare logistics and develop

ENG 5 - Deliver, evaluate and improve

ENGAGEMENT AND LEARNING



ENG 1 - ASSESS AUDIENCE NEEDS

CONSIDER EVERYONE IMPACTED AND GET OUTCOME AND MESSAGE FOCUSED

If you are reading this guide, the chances are that you will appreciate the need to review audience needs and select the best channels or techniques channels or techniques for engagement and learning. But we need to take that to the next level. Work out what specific outcomes you want to get from the engagement – for training what do we want specific roles to do differently? Think clearly about the messages and channels that would achieve those outcomes.

ENG 1 - Create a breakdown of the impacted stakeholders to understand audiences. For communication and engagement messaging, identify people impacted, sponsors and influencers and use a project timeline to identify what you specifically need them to do during the project in terms of outcomes. For all audiences, identify location, numbers of people and other characteristics. For learning, identify how complex the future stake tasks are and how frequently they will be used. At the same time, evaluate which channels or methods are going to be available to you, and what has worked in the past.

AUDIENCE AND CHANNEL ANALYSIS

A good audience analysis will contain logical groupings of audiences, very outcome focused messages or topics and characteristics that will allow you to select the best methods of delivery. Channel analysis provides an assessment of the communication and training methods that are typically used for those audiences and asks – do existing channels work?

Split the stakeholder groups into appropriate audience groups

Stakeholder Group	No. of People	Business Areas	Complexity	Language	Usage %	Frequency	Typical Channels
SALES							
Order Administration	25	Germany, Construction	Medium	German	80%	Daily	Notice board
Order Administration	30	Germany, Packaging	Medium	German	80%	Daily	Newsletter
Order Administration	40	France, Packaging	Medium	French	80%	Daily	Daily Brief
FINANCE							
Cost Centre Managers	1,000	UK	Low	English	0.05%	Monthly	Notice board
AP Accountant	50	UK	Medium	English	90%	Daily	Newsletter
General Ledger Managers	5	UK	High	English	50%	Daily	Daily Brief

Understanding the numbers of people and their geography will help to determine appropriate channels

For technology driven journeys determine the level of usage and the frequency that audiences will have to use the new system