

Architecture, Blueprints and Roadmaps: Fundamentals for Effective Organization Planning and Change Management

By James T. Stodd, SPHR

Successfully executing necessary change requires more than inspiring leadership, it requires preparation and detailed planning. To be successful, we recommend that change efforts be managed via architecture, blueprints and roadmaps.

Architecture

Leading an organization forward requires the ability to visualize and articulate on multiple levels. Perhaps the hallmark of any successful leader is that person's ability to bind individuals to a collective sense of "purpose" as well as to establish a "vision" for their organization that captivates interest and commitment. In that sense, successful leaders must serve as "chief architect" by presenting an engaging description (or view) of where the organization is heading.

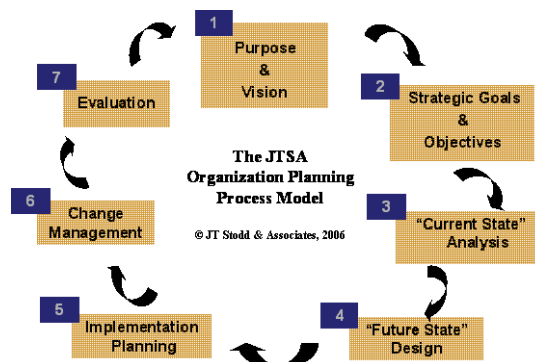
In a previous article we said that such engaging vision statements will generally address the following questions:

- **Who** Do We Want to Be?
- **Where** Are We Going?
- **What** Do We Want to Achieve?

The point was also made that while descriptive answers to these questions are nice, it's best if they are addressed using measures and metrics of magnitude or mixture (e.g., "grow to a \$150M company by 2010" or "expand and establish a visible market presence within 12 states by 2011"). In this way a good vision statement will provide color, form and dimension regarding what is to be accomplished much like an architect's rendition of a building. But as we all know, many organizations fail to achieve their vision and strategies not for lack of ability to conceptualize, plan or communicate, but because of their inability to execute!

Blueprints

Effective execution requires details regarding what is to be built or accomplished! In fact, most "architectural renditions" generally lack the full details necessary for the architect's "vision" to become reality; to do that requires a whole other level of much more detailed plans, they require...blueprints! Step 4 in our seven step organization planning and change management model (see below) calls for just that, detailed "blueprint" level rendition we refer to as the "future state" design.



A good “future state” design will provide details regarding both the organizational structure and infrastructure necessary to support strategies aimed at attainment of the organization’s vision and goals. More specifically, the “future state” design should address in detail the organization’s requirements pertaining to:

- ✓ Organization Design & Structure (including roles, responsibilities, reporting relationships, and key organizational integration mechanisms including vertical teams, cross-functional teams, task-forces, and standing committees)
- ✓ People (including number, competency requirements, culture, and practices or systems necessary to achieve the people requirements)
- ✓ Key Business Processes (including any changes to existing processes necessary to improve efficiency and effectiveness)
- ✓ Supporting Tools & Technologies (including any new or replacement technologies deemed necessary or beneficial), and
- ✓ Other Critical or Enabling Assets or Resources

In our last issue of this newsletter we presented an article entitled *Taking Stock of What You Have* that discussed Step 3 of the organization planning and change management process model. That third step, the “current state” analysis, involves conducting a detailed review of the organization’s current properties, characteristics and resources from the standpoint of enabling your organization to fully meet its intended purpose, vision and strategies. This analysis is much like what a general contractor would do in either surveying a work site prior to new construction, or reviewing an existing building (or structure) prior to a refurbishing or remodeling project. In short, it’s an assessment of what we have to work with, and what’s in the way!

The encouragement given in that article was for a review detailed enough to fully assess your organization’s current strengths and weaknesses relative to your “vision”, including identifying any properties or characteristics that would constitute either an “opportunity” to be leveraged or a potential “treat” to your success. Doing a good job with the “current state” analysis helps immeasurably in crafting the type of “future state” design necessary to get your organization where you want it to go.

Finally, contrasting the “future state” design with what was found during the “current state” review (frequently referred to as a “gap” analysis) provides the subject matter for change and change management activities.

Roadmaps

Clearly, trying to breach the full “gap” between your organization’s “current state” and the “future state” design in one fell swoop can be a daunting task! As such, wisdom suggests implementing change in more manageable “phases” or bites that are more likely to be achieved over the expansion of your full planning horizon. So, if you intend to double the size of your business in roughly equal intervals over a five year period, then you may want to phase in the changes to your organization structure and infrastructure in timeframes warranted by your plans. Even more specifically, in this situation it would be wise to have a stepping-stone version of your “future state” design established specifically for each year (or other time period) within the timeframe of your

planning horizon. This will allow for change to be planned and implemented in more manageable “bites” rather than “gulps”.

When taken all together, this sequence of steps will serve as the “roadmap” for accomplishing the intended change over the established period of time. In this way your change effort will be more easily communicable, understandable and manageable by both those affected by the change as well as those who will be charged with leading the change.

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