Contents

Analyse the strategic plan

For an organisation to be successful, it must set a clear vision and purpose and have strategies in place to achieve the vision. Organisational strategic plans are developed to help an organisation reach its desired long-term outcomes, often for a period of two to five years.

Here is some information about strategic plans.

What a strategic plan identifies

A strategic plan identifies the organisation's current state and the strategies that need to be implemented to position the organisation for success. It defines the vision or mission of the organisation, establishes goals and identifies strategies to achieve these goals.

The role of the strategic plan

The strategic plan is developed by key stakeholders in an organisation to set the organisation's future direction and actions to achieve success. The organisation's structure, leadership, systems, processes, and workforce capability and performance must be shaped by and aligned with the strategic plan.

The identification of strategic direction

Changes implemented as a result of a strategic plan may include system and process redesign, redesign of the workforce and leadership structure, and changes to culture, performance or individual roles. Following the identification of the strategic direction, leaders in the organisation can determine the operational or functional plans necessary to meet the strategic plan's goals and objectives.

Review the plan

To analyse an organisation's strategic plan, compare the current state of the organisation with the desired state of the organisation to identify the areas of need that must be addressed for the strategic plan to be achieved.

Prepare a development plan

The development plan relates to management, leadership, people, performance, culture, skills, attitudes, capability, motivation, reward and recognition. The development plan must ensure that individuals, teams and departments transition as easily as possible from the current state to the expected future state.

Organisational development interventions that may be included to enable this transition include the following.

Knowledge management

This is improvement to or redesign of practices and processes in the organisation that is used to exchange and distribute knowledge. This type of intervention may be highlighted when diagnosing risks to implementing a strategy.

Process consultation

This method is used to improve processes within the organisation. Groups and teams come together to develop practical solutions to issues related to process effectiveness and efficiency. The process is mapped and performance is reviewed to identify habits and practices that need to be improved to meet organisational objectives. Some examples of improvement that may be achieved are the removal of unnecessary approvals on completion of steps and putting in procedures to manage rework so other steps are not affected.

Communication

Communication is critical to building a positive organisational culture and achieving successful relationships across the organisation. Communication must be transparent, timely and organisation-wide, for both management and employees.

Team building

Team building helps employees get to know each other, learn to know what to expect from each other and understand the ways they can best work together. The actual activities depend on whether the team is new, already exists or has a new member. Brainstorming workshops – where members develop change goals, and identify strengths and weaknesses and ways to build on strengths and overcome weaknesses – are popular. Team leaders, HR staff and change team members can facilitate sessions.

Intergroup development

This intervention involves changing the attitudes and perceptions that work groups have of each other. A common technique is conflict resolution meetings, where different groups or teams get together to brainstorm issues affecting cooperation and efficiency, and work together to identify solutions to the issues. Common goals should be identified and actions undertaken to develop and achieve these goals.

Example: action plan to achieve strategic goal

Zimbo is a national retail business specialising in electronics. It has more than 150 retail outlets across Australia.

From its mission statement, Zimbo is committed to:

- providing quality products and services to its customers
- meeting the changing needs of customers
- offering innovative electronic solutions
- delivering speedy and personalised service
- professionalism and enthusiasm
- clean and green products and services
- sustainable work practices
- continuous improvement.

Zimbo is known for its enthusiastic and inclusive culture, and seeks to maintain professional and well-supported staff.

Zimbo's vision is 'To be a leading retailer of consumer electronics within Australia, by providing our customers with an unbeatable selection of high quality, environmentally friendly products and services at competitively low prices'.

In its strategic plan for 2016–18, Zimbo s included the following objective:

- Be recognised as an employer of choice that cares passionately about its staff.

The Organisation Development Manager at Zimbo, Karen Wheeler, created the organisation development plan that aligns with the strategic plan. After formal consultation and feedback gathering, she created the following action plan.

Action (what will be done)	Responsibility (by whom)	Time frame (when)	Expected outcome (measurable)	Actual outcome	Completion date
Introduce new staff rewards program for suggestions of innovative and feasible ideas	Karen Wheeler	31 March 2017	New staff rewards program in place and communicated to all staff		

1C Determine who will take key roles and confirm their commitment

The analysis of the existing organisational culture and structure generally uncovers gaps and needs that must be addressed by significant changes. Who manages these changes and how they are managed will affect the successful implementation of the organisation development plan.

Team members are chosen based on, for example, individual expertise, experience, knowledge and the ability to plan strategically. Their roles may relate to completing a task, managing, coordinating or administering a project to implement the strategy, finding solutions or gathering feedback and creating plans.

The following information outlines the roles of different people in organisation development.

Sponsor	**Change leader**
A senior leader in the organisation is usually appointed as a sponsor or initiator of the development initiative. This person drives a positive commitment and contribution from key stakeholders.	A skilled change manager, project manager or organisation development manager is required to lead the implementation and oversee progress. A team of change agents may support the change leader.
Development champions	**Leaders**
One or more champions can be assigned to communicate the benefits and progress of the development plan and to sustain enthusiasm and commitment. Champions or change agents may be responsible for gathering information and feedback to diagnose culture or workforce issues. This may involve conducting surveys, facilitating focus groups, conducting interviews or making team presentations.	The leader's role is to set the direction and influence teams and individuals to commit to the development plan. Leaders ensure that development activities are implemented and evaluated.

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Generate short-term wins

Leaders need to plan for and track accomplishments, rewarding short-term wins that move towards the achievement of the new vision. Consider the reward, recognition and celebration tools and techniques discussed in Topic 2.

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Sustain acceleration

At this stage, leaders should be able to change organisational policies and processes that do not support the vision. This many mean hiring or promoting people who can implement change or create new processes.

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Institute change

Embed the change by demonstrating the relationship between organisational success and the new behaviours.

Change management resources

There are a variety of reliable change management resources available on the internet to help you manage a change:

- Australian Public Service Commission, Change Management resources page: www.apsc.gov.au/projects/resources/human-capital-matters/2014/change-management

- Kotter International, Change management blogs, articles videos and newsletters: www.kotterinternational.com/insights/videos

- Queensland Government, 'Change Management Best Practices Guide': www.psc.qld.gov.au/publications/subject-specific-publications/assets/change-management-best-practice-guide.pdf

- Queensland Government Chief Information Office, 'Change Management Plan Workbook and Template': www.nrm.wa.gov.au/media/10528/change_management_plan_workbook_and_template.pdf

- Tasmanian Archive and Heritage Office, 'Information Management Advice 55 Change Management: Preparing for change': www.linc.tas.gov.au/__data/assets/pdf_file/0004/408352/Advice-55-Change-Management-Preparing-for-Change.pdf

Example: collect and analyse business data

Conducting 360 degree surveys is one way to capture how people in the organisation are behaving and performing. Findings from such surveys need to be included in the development plan, which will provide recommended action plans to address the any organisational problems.

The following is an example of a 360 degree survey conducted by individuals seeking feedback on their behaviour at work.

Please complete the survey below and return it to _____ by 30 June 2016.				
Please indicate your work relationship with me	Manager	Peer	Employee	Other (please indicate)
How often do you interact with me?	Very often	Sometimes	Rarely	
How would you rate me on each of the following behaviours? Please provide short examples to support your response.				
I display leadership to my team.	Always	Sometimes	Rarely	Never
Example:				
I motivate my team to get work done.	Always	Sometimes	Rarely	Never
Example:				
I am effective in my work.	Always	Sometimes	Rarely	Never
Example:				
I display understanding and consideration of others.	Always	Sometimes	Rarely	Never
Example:				
I display effective listening skills.	Always	Sometimes	Rarely	Never
Example:				
I display creativity.	Always	Sometimes	Rarely	Never
Example:				
I solve problems effectively.	Always	Sometimes	Rarely	Never
Example:				
I could improve by: (select up to three items)				
	Nothing needs to improve	Managing stress better	Being more friendly and approachable	Listening better
	Being more efficient	Understanding the business better	Completing tasks on time	Delegating tasks more often
	Other (please indicate):			

Determine consultation and communication methods

Methods of consultation and communication will depend on the stakeholder group and target audience, and will determine the resources required.

The following provides examples of methods of consultation for different stakeholder groups.

Manage closely	**Keep satisfied**
• Regular, personal interaction via telephone or casual conversation to win and maintain support • Consultation to seek input into change strategy • Fortnightly or monthly status updates presented during a meeting or via email • Milestone announcements and reports	• Occasional personal contact • Consultation with stakeholders who have expertise that can provide input into the change process when required • Emailed written progress or budget reports • Newsletters emailed • Announcements and briefing via blogs/posts on wiki or intranet
Keep informed	**Monitor**
• Daily/regular interaction; team member/s must be available via telephone, email, video or in person for support • Briefings and meetings to communicate change need and requirements, and discuss options • Forums to encourage participation in decision-making by seeking feedback • Workshops to train employees on new practices or processes • Morning/afternoon teas to celebrate small wins • Surveys to obtain feedback • Celebratory lunches to focus on milestone achievements	• Newsletters emailed • Announcements via blogs/posts on wiki or intranet • General feedback via email or wiki/intranet • Organisation-wide briefings

Communication plan

The communication plan needs to outline actions and time lines for communicating the development plan and reporting on the implementation progress. You need to ensure that you include two-way communication methods, so that you can quickly and constructively respond to feedback, concerns or issues.

List the stakeholder groups, including end users, customers, senior management and sponsors. Identify what type of communication is critical and what organisational applications, such as wikis and email, are appropriate for each stakeholder group; for example, monthly reports to senior management and sponsors but weekly emails to affected staff.

Here is some information about communication plans.

Your communication plan needs to include:

- Who will receive information
- How information will be communicated
- How feedback will be sought, monitored and incorporated
- How the team will respond to feedback and ideas
- How issues will be recorded and monitored for continuous improvement

Example: develop a communication plan

The following is an example of a communication plan for communicating an objective.

Development objective				
New rewards and recognition scheme to be implemented for innovative and feasible ideas by 15 March 2016				
Stakeholder (group)	**How will we communicate information to them?**	**How will we get their feedback?**	**How will we respond to feedback?**	**How will we record and monitor issues?**
All employees	Monthly – all-staff briefing followed by email; also reiterated in CEO's message of the week (week ending 15 March)	• Listen and record feedback during meeting • Ask employees to email feedback@zimbo.com.au • Open-door policy to allow staff to chat 1:1	Email 1:1	Feedback log

2A Identify and implement consultative processes to maximise participation in the development process

Successful implementation of an organisation development strategy relies on effective consultation and meaningful participation and engagement of employees.

Critical factors that influence successful implementation of the organisation development plan are presented here.

Development process success factors

Effective leadership from the implementation team, ensuring they have the capability and capacity to meet the time lines and deliverables and to help champion the change

Regularly communicating and reporting on implementation progress, including the status of funding, time lines, resources, engagement, issues and risks

Leading the implementation of the communication plan to ensure staff are clear on the strategy, are engaged in the process and have buy-in to the outcomes and success

Delivering results, ensuring milestones are visible across the organisation, and acknowledging and recognising the contributions, efforts and participation of staff

Engaging with stakeholders to resolve barriers and issues, including minimising stress or performance effects and looking for alternatives or options to address these

Working closely with departments to maximise engagement and looking for other opportunities or strengths that can be leveraged to support the change

2B | Develop collaborative approaches to problem-solving and facilitate groups to articulate problems and propose solutions

Organisations need teams. Teams and groups are capable of generating hundreds of ideas and solutions – many more than individuals could do on their own.

Organisation development managers need to be skilled in bringing people together to work in teams or groups, in order to work towards the goals stated in the organisation development plan. Teams/groups of people need to be encouraged, even trained, to work together – this does not come naturally to everyone. Collaborative problem-solving involves teams of individuals working together to resolve a particular issue or concern in the organisation.

Organisation development managers often have to consider or reconcile a variety of interests in order to address complex business problems. Some of these problems can be widespread or founded on strong cultural bases. This makes them difficult to resolve without the involvement of employees and stakeholders.

When multiple stakeholders collaborate, they create a collective resolution that is mutually beneficial to all parties. This collaboration can support mobilising the resources necessary for more workable and sustainable solutions.

Collaborative problem-solving process

One approach to getting the team to work together to solve problems is to lead them in the 8-Disciplines (8D) method. The 8D method was developed by the Ford Motor Company in the late 1980s to help teams resolve design and production issues. The method is now applied in a number of organisations to solve any number of problems.

Once the organisation development plan has been created, you can use the eight disciplines in the problem-solving process. It is important to ensure that each step applied in this problem-solving process, so thorough planning and preparation are vital. Prior to implementing the problem-solving process, you need to identify who will be involved. Create a plan outlining your approach: who will be involved, the time frame and any resources that are required to assist with solving the problem.

An outline of each of the steps in the 8D method is provided here.

Treat risks

Even when risk tolerance is high, risks need to be treated. The objective is to eliminate or avoid the risk where possible. Should the risk occur, the objective is to control the outcome.

Here are the five options for managing risks.

Avoid the risk	Options to avoid risk include the following: • Do not become involved in activities that lead to the possibility of the risk eventuating. • Outsource risk-related tasks to contractors or specialist providers. • Discontinue practices that may realise the risk.
Reduce the likelihood	The likelihood of risks can be lowered by removing various stimuli or situations likely to materialise the risk. This may be as simple as: • reducing exposure to the risk environment • removing or reducing activities that may lead to the risk being triggered • using inspection controls and quality assurance measures • ensuring time lines are realistic.
Reduce the impact	Contingency plans are a valuable tool for helping reduce the impact or consequence of a risk event and include: • establishing measures to control or minimise damage if the risk is realised, such as fraud control planning, public relations, disaster recovery planning, pricing controls • developing administrative measures, controls, policy or procedures to provide guidance.
Share the risk	If a risk is too high to take on alone (for example, expanding the business into a new industry), partnerships and strategic alliances allow for risks to be shared. Sharing the risk also commonly involves external investors such as venture capitalists, or insurers and underwriters, and may include insuring against an event occurring.
Retain the risk	Some negative risks may be at an acceptable level when the likelihood and consequences can be adequately managed internally within the organisation. Others may have such a low level as to not warrant any effort. For example, occasional staff absences may not have a huge impact on meeting time lines, so this low-level risk can be accepted.

2C Manage conflict by intervening, brainstorming alternative proposals and negotiating outcomes

Conflict may involve a simple disagreement between two or more colleagues trying to reach a decision or solution, or it could be based on international disagreement between nations. People experience conflict when their perceptions, values, ideas or beliefs are threatened or obstructed by another person, group or party. People react to conflict as a result of what they believe or perceive to be true.

In creating or implementing an organisation development plan, conflict may result from different opinions relating to people's own perceptions or experiences of how things work well or how things should be done. Conflict may also result from personality differences and tensions where people have strong emotional attachment to their ideas and opinions and may see different views as confrontational or attacking.

Here is some information about possible sources of conflict and how to manage conflict.

Sources of conflict	Conflict management
Other sources of conflict include the following: • Goal incompatibility – people have goals that interfere with each other • Differentiation – people have differing beliefs and attitudes due to their backgrounds and experiences • Task interdependence – team members often have to rely on others in completing their own tasks • Scarce resources – competition between people arises when resources are scarce • Ambiguity – this increases the risk of people crossing over or interfering with the goals, objectives or work of other parties • Communication issues – people lack the opportunity, ability or motivation to communicate effectively with others	As an organisation development leader, you need to play a key role in helping resolve conflict situations. The benefits of effective conflict management include the following: • Increasing understanding of people's relationships with one another • Developing respect and respectful behaviours • Improving your leadership credibility in the organisation • Minimising future conflict situations • Creating a more harmonious work environment that fosters trust, cooperation and collaborative decision-making • Strengthening and reinforcing organisational values, behaviours and policies

The conflict resolution steps

The conflict resolution steps (adapted from Trinder & Wertheim 2005) are a tool that managers and team leaders can use to resolve team issues and achieve win–win solutions. This tool identifies six positive actions a manager or team leader can undertake within a conflict situation.

These steps are shown in the following information.

Conflict resolution steps can:

- contain and manage strong emotions
- verbally express own thoughts and feelings
- identify and express own interests
- empathise with others
- generate a number of solutions to the problem
- negotiate a win–win solution.

Example: manage conflict

AMG is a small technical consulting company. Conflict arose between two colleagues on the approach to a client problem. Each person had a different view on the most appropriate and cost-effective solution. Colin, who was to implement the solution, believed it would be preferable to submit a solution that would be sustainable over a long period of time, even though it was more costly to the client and required resolving a number of challenges. Kate, the client manager, believed she understood the client needs best. She also believed the client was looking for a less costly solution and might be quite agreeable to an updated solution at a later stage.

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In helping to resolve this conflict, the area manager, Michael, asked Kate and Colin to outline their ideas and articulate why they thought their solution was preferable. Michael asked that each person only discuss the facts and not share their emotional justifications. Michael then summarised the situation and each person's views, checking that this was accurate. He guided Kate and Colin on agreeing to a solution by breaking the issues into smaller parts and addressing them according to organisational processes.

Here is some information about managing conflict.
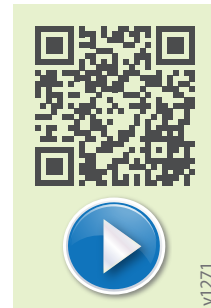
Possible solutions to managing conflict
• Michael started with the 'obvious' solution (if there was one) and discussed its advantages, disadvantages and alternatives.
• He helped to facilitate a brainstorming session to identify all possible solutions and assess each option.
• He then encouraged Kate and Colin to negotiate a win–win outcome.

Test expected results

As shown by the example above, establishing measures of success is another way of testing our assumed or expected results. We think that particular actions will bring about a particular result. Establishing measures and then comparing actual results with assumed results is a reality-check. If the results do not meet our expectations, we then explore what should change or what should continue.

Design surveys

Survey design is complex and it is easy to obtain inaccurate or skewed results. Therefore, it is important that surveys are used in conjunction with other evaluation methods to identify support for the development program. These can include follow-up interviews and focus groups.

Furthermore, surveys are often used to help identify where further inquiry is needed. For example, after obtaining an indication of stakeholder engagement, you can conduct further investigations such as interviews or focus groups to gain more understanding of or insight into the responses.

The methods used to survey, evaluate or test our success measures are critical in informing us of the level of support for the organisation development program The following presents guidance in survey design, which is based on Bradburn, Sudman and Wansink's 2004 book *Asking Questions: The Definitive Guide to Questionnaire Design*.

Here are the different elements to take into consideration when designing surveys.

Questions

Clearly identify the survey's purpose or objective, then decide what overarching questions you want to ask. This will help guide your specific questions.

Decide who will be surveyed and how many people to involve. Will you conduct a sample survey or survey everyone? When using sample surveys, you need to be careful that your conclusions will be truly representative of the wider organisation. Who you survey and the number of people you survey will influence whether your responses are meaningful. Sample groups also need to be consistent, so you need to ensure that some areas are not overrepresented. For example, if you only receive 2% of responses from one area and 80% from another area, the results will not be truly representative and therefore not valid. It is also possible that a low response rate may, in fact, be a reflection of some dissatisfaction or lack of engagement that needs to be addressed.

3B | Maintain regular team meetings

Any successful organisation transformation requires contribution, input and participation by the people who perform the work and who can readily identify problems or issues. It is critical that you have a highly effective team of motivated and enthusiastic people implementing the development plan.

As an organisation development manager, you must have commitment to your team. You need them to know you will readily share updates or important new information. They must also be given the opportunity to regularly share any new events, risks or issues and to celebrate success. Information shared at team meetings may also, on occasion, indicate the need for interventions to ensure teams have the skills, behaviours, knowledge and time to conduct effective meetings. It is important to monitor each meeting's inputs and outputs to ensure the flow of information is consistent and efficient, leading to actions or results.

Teams should be involved in planning their meetings and results should be pushed down to the team level so that team members can openly share the causes of issues. It is also important that you conduct regular meetings with key stakeholders and seek regular feedback from teams in the organisation who are affected by the development plan implementation.

Actions to maintain regular meetings

To help maintain regular team meetings, consider the following actions.

Maintaining regular meetings
Ensure that teams have up-to-date status information and are aware of identified issues, risks, positive improvements or outcomes that can be shared.
Ensure you have established clear levels of responsibility and lines of communication. This may include providing a list of agenda items.
Assign team members the task of clearly identifying impacts; for example, what problems might result when implementing a new process.
Provide team members with the opportunity to brainstorm and contribute ideas, improvements and solutions to problems.

Changing the goals or objectives

> Are there external or internal environmental factors that are affecting the results? If so, review the objective to align with these new conditions. Relevant stakeholders must be involved in changing the objectives or goals of the plan.

Reviewing structures or systems

> If barriers or risks to the implementation are caused by structural, process or system issues, you need to identify what changes can be made.

Ensuring activity dependencies are managed

> Management must remember that adjustments in any of the above areas may require adjustments in one or more of the other factors. For example, adjusting the objectives is likely to require different strategies, standards, resources, activities and perhaps organisational structure and systems.

Update the plan

It is important that the development plan is updated to reflect any modifications and the appropriate approvals and sign-offs must be obtained as well.

It is also imperative that modifications to the development plan are communicated to stakeholders, so that these revisions are understood and incorporated across the organisation.

Example: modify organisation development plans

New external regulations emerged that an organisation urgently needed to respond to. This affected the availability of leaders to attend the development program. In addition, the new regulations affected the financial and personnel resources available to the development initiative. The organisation development leader met with stakeholders to determine the level of impact on leaders and the support required, and a SWOT analysis was conducted.

The SWOT analysis determined the following:

- External consultants would be engaged to assist in responding to the new regulatory requirements. This would reduce the stress for leaders trying to get up to speed with the new compliance issues. A cost analysis identified that ultimately this would be less costly and would mitigate compliance risks.
- There was opportunity to incorporate the work involved in the regulatory effects into the leadership program; for example, communication to staff, preparing reports, leading change.
- The development plan was updated to incorporate the changes.
- The activities were reviewed and redeveloped.

Evaluation considerations

Your evaluation needs to focus on the following areas.

Resource usage	• Were planned cost allocation levels appropriate for the activities? • Was there any wastage in terms of resource times or costs? • Could savings have been made in any areas? • What could have been done differently? • Have the benefits outweighed the costs? • Would the resources be better used elsewhere? That is, what was the opportunity cost of using these resources for the program? • Could greater benefits to the organisation have been achieved if funds and human resources had been focused on other improvement projects?
Schedule	• Were the time line and schedule realistic and achievable? • Was the time involved in implementing the development program consistent with the plan? • What were the reasons for not meeting time lines or milestones?
Methodology	• Was the implementation approach flexible and did it allow for opportunities and improvements? • Did the strategy exploit unexpected opportunities? • How were opportunities and improvements captured and incorporated into the development activities? • What improvements or changes were made to the plan?
Results	• Are the performance results clearly visible across the organisation? • What evidence supports this? • Has the implementation resulted in changes to culture, behaviours, attitudes, reputation? • Are stakeholders keen to see the same strategies applied in future development plans?
Risk	• Were the level or tolerance of risk appropriate? • How well were risks managed and mitigated? • What additional threats or issues occurred and how were these dealt with? For example, were there impacts relating to such issues as work performance, time commitment required for staff/stakeholder involvement in meetings, input, testing etc; staff satisfaction and retention; organisation culture; and proportion of the organisation's resources that has been consumed in the implementation?

Summary

1. The methods used to survey, evaluate and test success measures are critical in evaluating the level of support for an organisation development program.

2. Surveys, interviews and questionnaires are good methods for gathering feedback from stakeholders during the implementation of a development plan. However, they need to be carefully designed in terms of what they contain, how they are administered and who the target audience is.

3. Any organisational change needs to allow for regular, meaningful contributions, input and participation by the people affected by the change, as they can readily give feedback on a change implementation and readily identify any issues.

4. Control involves monitoring, evaluating and correcting work performance. In an organisation development program, maintaining control allows us to measure planned activities, compare implemented activities with how they were planned and to take action if necessary where there are significant variations.

5. Corrective actions include modifying standards, objectives, strategies, structures, systems and/or activities. These may result in corresponding modifications to the organisational development plan, which must then be reapproved and signed off by key stakeholders.

6. Organisation development leaders are responsible for engaging senior management in a development program and ensuring their continued support. They need to be clear about the level of support that senior management can provide, the role each senior manager will play in the implementation process and, critically, the decisions they will need to make.

7. Measuring and evaluating the cost-effectiveness of an organisation development program, as well as the outcomes and benefits to the organisation and its employees, are important parts of determining whether the critical success factors identified in the development plan have been met.