



Leadership Academy  
South East

# GP Federation Organisation Development Toolkit

“Any intelligent fool can make things bigger, more complex, and more violent. It takes a touch of genius — and a lot of courage to move in the opposite direction.”  
Ernst F. Schumacher, *Small Is Beautiful*



Thames Valley and Wessex Leadership Academy is passionate about developing leaders at all levels, whether this is the start of your development journey, a point of change in your career or as an established leader who is facing the challenges of managing complex services and delivering change.

Tricordant is a whole systems consultancy working across all types of complex organisation. Our mission is to enable people to work to their full potential, through the creation of whole work within healthy, sustainable and effective organisations.

Thames Valley and Wessex Leadership Academy and Tricordant are partnering together to support the development of the GP Federation community in West Hampshire, together we add value through:

- Whole System Organisation Development experience and expertise – to leave you sustainable and resilient to withstand a volatile external environment
  - Organisation Design expertise – to help design healthy places to work, leaving tools and techniques with you.
  - Strategic local expertise and experience – joining the dots and keeping the people at the centre of the change.
  - Local knowledge and relationship management
  - Expertise and experience in understanding Clinical Commissioning leaders – to help navigate the complexities partnerships
  - Resilience in having the joint capacity to respond to client needs for provision of intensive input and follow-up.
- 
- To learn more visit <http://www.tvwleadershipacademy.nhs.uk/> or [www.tricordant.com](http://www.tricordant.com)



# Purpose, Content and Outcomes



## Purpose

- To support the development of the GP Federation community with a practical, simple and sound Organisation Development (OD) approach to the establishment and / or improvement of GP Federations.

## Contents

- A hyperlinked Contents slide to enable quick access
- A brief introduction and overview of OD including a simple definition
- A reminder that OD must work on both behaviours and the task at hand
- A sound but simple OD planning cycle, including purpose, outputs and key insights per stage
- Practical tools, 'takeaways' and ideas – all readily found online for further exploration

If you have any queries about this toolkit please contact [nick@tricordant.com](mailto:nick@tricordant.com) or [roger@tricordant.com](mailto:roger@tricordant.com)



# Contents

- Purpose of this toolkit
- What is OD and how do I do it?
  - Definitions
  - Values shaping our behaviours
  - Two critical dimensions of OD work
- The Purpose of an OD Plan
- 5 Step OD Planning Cycle
  - Discovery, Data and Dialogue
  - Prioritise and focus improvement
  - Agree key interventions
  - Plan the processes
  - Track agreed measures



These **titles** are hyperlinked for use in the pdf file

The **home** icon top left returns you to this page



# Organisation Development is...



- The work organisations do to improve their effectiveness. It is normally thought of as being planned to include the whole of the defined organisation.
- At its best OD provides the ability for an organisation to reflect, learn, and improve together. Systematically constructing your future story together as a system through dialogue in a process of planned, transformational change.
- Organisation Design is a branch of Organisation Development dedicated to the design of organisational processes, structures and roles.



## ... and the text books



- A planned process of change in an organisation's culture through the utilisation of behavioral science technology, research and theory. (Warner Burke)
- A system-wide process of data collection, diagnosis, action planning, intervention, and evaluation aimed at
  - (1) enhancing congruence among organisational structure, process, strategy, people and culture;
  - (2) developing new and creative organisational solutions; and
  - (3) developing the organisation's self-renewing capacity. (Michael Beer)



# OD Values



The practice of OD is grounded in a distinctive set of core values and principles

Optimistic	Humanistic	Democratic
<ul style="list-style-type: none"><li>• People are good</li><li>• Progress is possible</li><li>• Growth is happening</li></ul>	<ul style="list-style-type: none"><li>• Individuals matter</li><li>• Respect the whole person</li><li>• All have potential</li></ul>	<ul style="list-style-type: none"><li>• Voice</li><li>• Freedom</li><li>• Equity</li></ul>



# Translating the Values – a challenge to us all!



- The OD values translate into shaping our own behaviour and actions in the work of OD:
  - **Respect and Include** – equally value the perspective and opinions of everyone, thought diversity strengthens the outcomes
  - **Collaborate** – build and encourage collaboration throughout the organisation and wider system
  - **Authentic** – strive for authenticity and congruence, encouraging these qualities in the organisation and wider system
  - **Self-aware** – develop your own self-awareness and interpersonal skills. Engage in personal and professional development through lifelong learning. Encourage this within the organisation and wider system
  - **Empower** – focus effort on helping everyone in the organisation and wider system to increase their autonomy and empowerment to levels that make the system meaningful, fulfilling and productive.

Based upon [Principles of OD Practice](#)



# Two dimensions to the work of OD



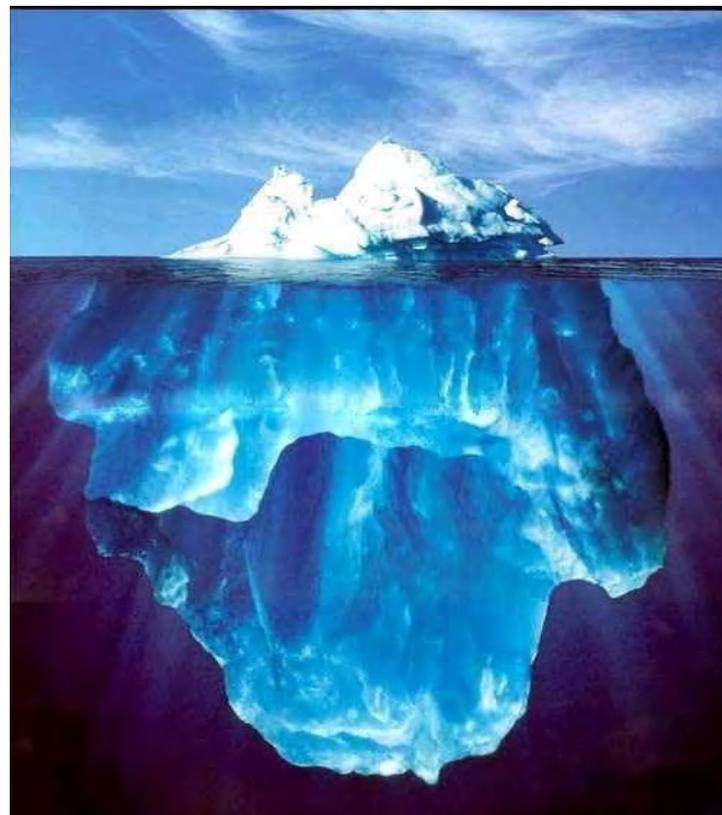
**Insight:** Ignore the hidden dimension at you peril!

## Visible dimension (Task 1)

- **What** you work on together.
- Rational, structural, policies, processes, goals, performance frameworks, measures, procedures and commitments.

## Hidden dimension (Task 2)

- **How** you work together, your values & behaviours
- Culture eats strategy for breakfast!
- Organisations rarely do what they are “told”
- The way we do things around here.
- Group dynamics, hopes aspirations, creativity and potential





# The work of OD – a broad field



**Insight:** We've all been doing OD a lot of the time, we mostly just need to improve how we do it.



"It's at the juncture where organisational purpose and individual calling start to resonate with and reinforce each other that truly extraordinary things happen." – Frederic Laloux, *Reinventing Organisations*



# The Purpose of OD Planning



- “The plan is useless; it's the planning that's important” – Dwight D. Eisenhower.
- OD planning is one of the key ongoing activities every organisation needs to run. This is to ensure the internal development of the organisation is continuously aligned to the current strategy or new strategy and ultimately to deliver the external goals e.g. seamless patient care. Misalignment will lead to poor productivity, uncertainty and stress.
- The OD planning serves several functions:
  - Focuses the development of capability in the organisation on the key priority areas aligned to the external goals
  - Describes the key interventions and how they will be managed so that people understand how they link to their real work and will improve the organisation
  - Supports measurement of progress against clear metrics



# What goes in an OD Plan



- An OD Plan will usually describe
  - The strategic issues facing the organisation – what the focus of development needs to be
  - The capability aspirations of the organisation – what it wants to become
  - The approach to OD being adopted – key methods and strategies
  - The key interventions planned – the specific programme of work over the next period that will align the organisation holistically with the new strategy
  - The feedback loops – to enable ongoing improvement and to measure progress in the key areas



# OD Planning Cycle

This 5 Step OD planning cycle is built on a learning cycle of planning, delivering and evaluation to continuously improve the organisation or group to fulfill its purpose.

The cycle has 5 steps to enable people in the organisation to work together to gather data, define issues and determine a suitable course of action. The organisation is assessed to create an understanding of the current situation and to identify opportunities for change that will meet business objectives.

**Insight:** The ways in which people communicate and work together are addressed concurrently with technical or procedural issues that need resolution.





# OD cycle step 1

## Discovery, Data and Dialogue



- Purpose: To scope the issues you are addressing, with clear boundaries, and to guide key stakeholders through a process of discovery, engagement and dialogue that will surface all the relevant data and mobilise action
- Outputs & outcomes:
  - A clear and shared understanding of organisation exists
  - A clear and shared understanding of the strengths, hopes, fears, future vision, internal systemic issues & wider strategic issues
  - Engaged, committed stakeholders

Discovery,  
data and  
dialogue

**Insight** Do not proceed without there being a clear understanding why the organisation exists and what you are trying to do!

**Insight:** Check language used, do we all mean the same thing when we use the same words?

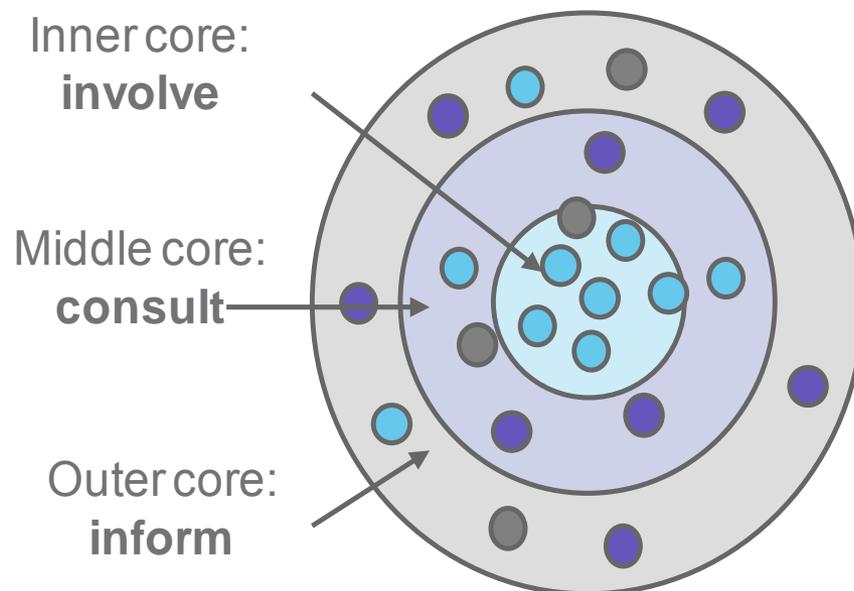


# Engagement Tools



- Design Teams
- Surveys
- Interviews
- Focus groups
- Story boarding
- Culture mapping
- Events

**Insight:** Stratify how you engage your stakeholders based on influence and attitude to the work



**Insight** “People support what they help to create” Weisbord



# Data Collection Frameworks



There are several data collection frameworks that may be more or less suited to your requirements.

- The Tricord – see explanation and example below
- Star Model – see applied example below
- DVFC – explores how to overcome resistance to change
- SWOT – analysis to create a successful competitive position
- Appreciative Inquiry – explores the best of what is to imagine what could be
- Polarities – allow people to explore how to manage interdependent issue which cannot be individually resolved
- NHS Change Model – a useful organising framework for sustainable change and transformation

**Insight:** Identify a framework which is fit for purpose, easy to use and supports the OD values



# Types of data

- Hard data – numbers and outcomes
- Soft data – feelings and perceptions
- Political data – power and resistance
- Internal data – competence and readiness
- External data – views and expectations

**It's all valid data!**



# The Tricord Model



- **Purpose:**

- A ‘whole system’ lens which describes all aspects of an organisation that need to be aligned for the whole to be healthy
- It ensures we take an holistic, systemic view rather than a functional, component view of the organisation
- It is the alignment of the three outer domains of the Tricord (Strategy, Systems and Culture) acting in balance around the central core (Identity) that is the source of organisational wholeness
- When one part of the Tricord is incomplete or unaligned then the organisation will be dysfunctional in some way.
- If all dimensions of the Tricord are clear and aligned the organisation will be whole, productive, vibrant, capable, competitive and successful

- **Context:**

- We can use it both to judge the health of the current state or to design the desired future organisation.
- Use it to capture the initial diagnosis of the current system.
- It can be used to structure interviews and discovery in organisations.
- Use it also to capture the emerging redesign for the whole system. The system stakeholders can use it to synthesise their desired future
- You can compare before and after Tricords to start planning the change journey.
- It can be used at any or all levels of system: for team, department, division and whole organisation to ensure alignment



# The Tricord

**Strategy**

Concept  
Vision  
Goals  
Objectives  
Values

**Identity**

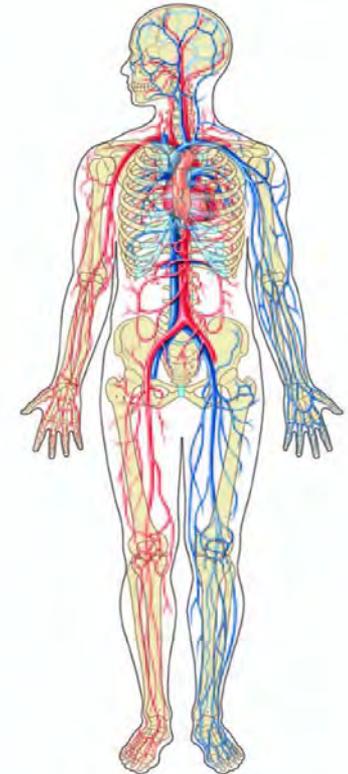
Foundation  
Reason  
Core Purpose  
Ethic  
Uniqueness  
History  
Brand  
*Leadership*

Processes  
Governance  
Infrastructure  
Projects  
People Structure  
Skills  
Measurement  
Reward

Spirit  
Energy  
Teamwork  
Language  
Motivation  
Behaviours  
Evaluation

**Systems**

**Culture**





# Example describing the present Federation using the Tricord



## Identity

- Grouping of independent practice businesses.
- Pvt limited company
- Co-ownership by Practices
- To improve and create community based services that are of a high quality, efficient, convenient, reliable and safe & to protect primary care
- Core values: exceptional care, team working, collaboration, efficiency, transparency, patient engagement

## Strategy

- Aims: sustainability, agility, partnership, safe high quality services, treating patients with dignity and respect, efficiency and economies of scale
- Build trusting relationships – potential for collaboration
- Influencing CCG priorities for investment in primary care
- Engaging the public

## Systems

- Directors balancing with paid day job.
- Federation viability and sustainability issues
- Cash flow challenges
- Contracts covering minimal overheads
- Practices have pump-primed and provide free time
- No on-going funding mechanism.
- CCG contracting mechanism cumbersome and unsympathetic to a small business.
- Lost cross-learning between Federations.
- Patient participation group – self monitoring

## Culture

- “Mixed relationships pre-existing the Federation”
- Must benefit Patients, Members & Federation
- Need to gain confidence & trust from members
- Desire from practices for accelerated growth
- Personal leadership investment, passion and vision
- Some differences in views on how to best use limited resources
- Building trust through engagement and practice manager and GP representation on board



# Example describing the future Federation using the Tricord



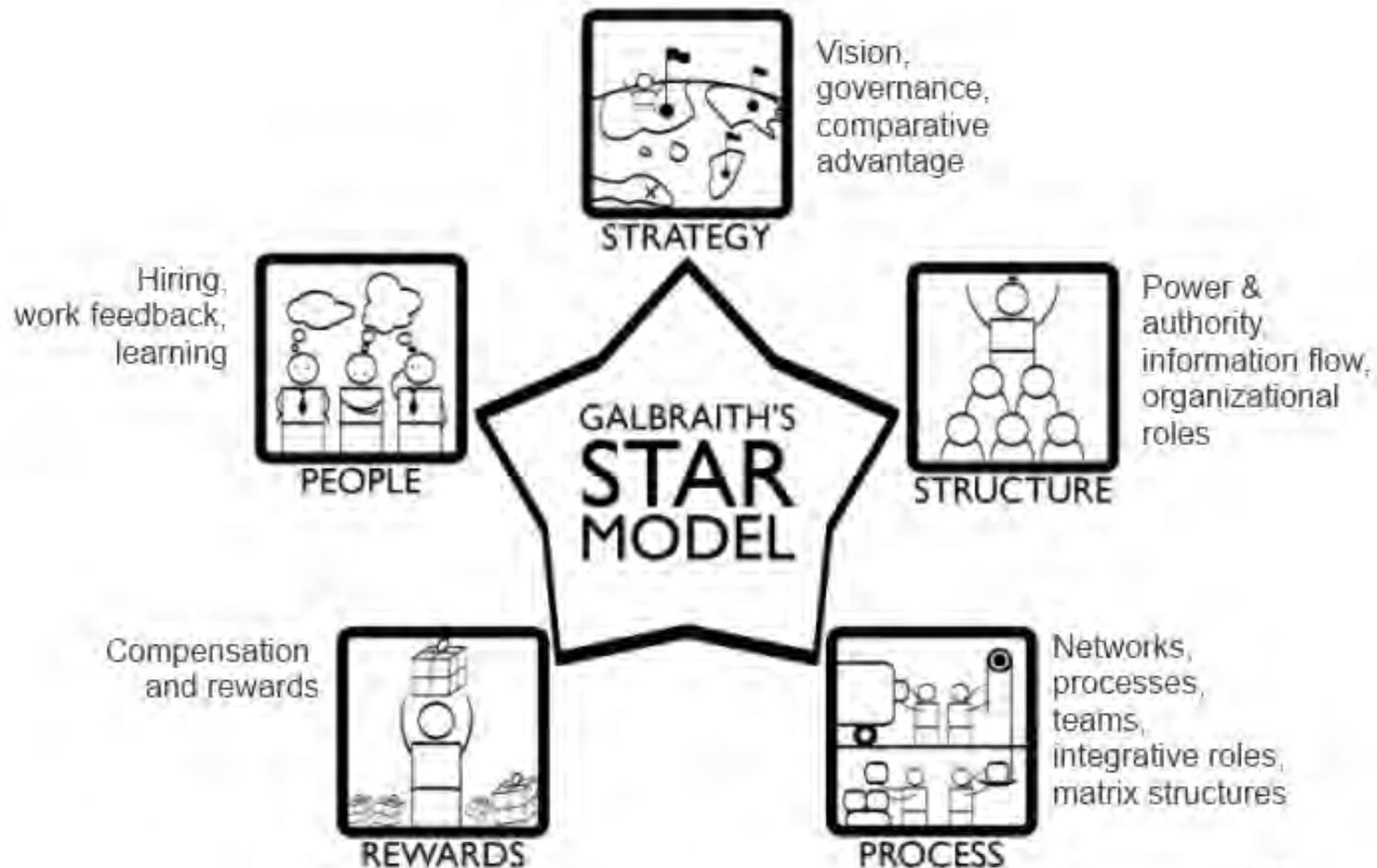
<p style="text-align: center;"><b>Identity</b></p> <ul style="list-style-type: none"> <li>• Be a Community Interest Company with members composed of our independent practice businesses</li> <li>• Be a reliable, reputable and cost effective organisation, making a difference in peoples lives while co-developing sustainable primary care</li> <li>• Core values: exceptional care, team working, collaboration, efficiency, transparency, patient engagement</li> <li>• Considered as innovative leaders</li> </ul>	<p style="text-align: center;"><b>Strategy</b></p> <ul style="list-style-type: none"> <li>• Aims: sustainability, agility, partnership, safe high quality services, treating patients with dignity and respect, efficiency and economies of scale</li> <li>• Vision &amp; strategy focussed on innovation and Accountable Care Organisation</li> <li>• High awareness with partners</li> <li>• Engaging and collaborating with the wider system e.g., voluntary sector, acute, council, public etc</li> <li>• Influencing commissioning priorities for investment in primary care</li> </ul>
<p style="text-align: center;"><b>Systems</b></p> <ul style="list-style-type: none"> <li>• Sustainable structure and capacity to deliver agreed strategies</li> <li>• New patient services which fulfill local needs</li> <li>• On going funding mechanisms</li> <li>• Shared services and resources between practices and with other Federations / partners e.g. staff training, bank staff, finance, legal.</li> <li>• Agile decision making</li> <li>• Use of innovative tools and technologies to improve patient outcomes and care delivery</li> <li>• Strong patient participation</li> </ul>	<p style="text-align: center;"><b>Culture</b></p> <ul style="list-style-type: none"> <li>• Strong relationships across the Federation</li> <li>• Members <b>and</b> Federation receive benefit</li> <li>• Trusted to make the right decisions by members</li> <li>• Increasing investment of passion and resource from member practices</li> <li>• Strong ongoing engagement processes – face to face + online to develop relationships and support decision making</li> <li>• Recognised as having a ‘can do’, attitude who are ‘easy to work with’ by the wider system</li> </ul>



# The Star Model



- Strategy – IS PART of an organisation’s design. What strategy is to the other parts, and people often miss, is to provide design criteria to describe capability, aspirations and clarity of core processes (purposes, significant transformations)
- Structure – will NEVER be right, there is no perfect structure, but should align to strategy and support smooth working of the core processes
- Processes – include vertical core management processes like communications, decision making etc. AND also lateral integrating mechanisms from the informal meetings up through levels of formality until you get to the matrix
- Rewards and metrics – what gets measured and rewarded acts to reinforce the strategy
- People – a design includes good HR processes that ensure people have the skills, capability and capacity to deliver, includes clarity of expected behaviours etc., but not culture as that is a summation of all these and NOT something you create directly



© 2008  
Wingon



# Example using Star Model for discovery interviews



Date	Strategy	Structure	Processes	Metrics & Rewards	People	OD priorities
25-Nov	Cluster strategy may be clear to CCG chairs but not to CCG GPs themselves. CCG strategy still hazy; CCGs at different levels (xxx Practice ahead, yyy Practice still developing). Goals shared loosely could be better driven down and communicated. Could do with a clear plan of activities and timescales for transition.	Cluster should not forget GPs have a provider role too - quality improvement is key here in line with commissioning as well.	<p>Clear process needed to manage transition - checks and balances needed to ensure quality does not slip and pace maintained.</p> <p>Quality and safety - mechanism to flag up issues before they happen. Quality in secondary care with nursing director, primary care with medical director - need to link up quality and governance 'patient level not contract focus'.</p> <p>Need BI support to understand what/where/how much about contracts they are taking over.</p>		<p>CCGs involved in recruitment process - good.</p> <p>Not seen all staff yet - hard to set performance objectives.</p>	<p>1) Faster and more effective transfer to CCGs, mechanism for good transfer needed (milestone plan for CCG staff, support available).</p> <p>2) Communications strategy - 2 way communication mechanism for staff.</p> <p>3) CCGs to maintain quality of provision/services - not lose focus with commissioning responsibility.</p> <p>4) Effective handovers - transition plans need to be clearer.</p>



# Example from an OD Plan



## Strategy

## Structure

## Processes

## Metrics/Rewards

## People

- Emerging national strategy
- Knowledge of cluster plans and objectives unsure as to how they link to CCG plans
- CCG strategies and plan emerging

- Perception that Cluster structures are compliance orientated and task focused based on Cluster business rather than CCG priorities
- CCG structures under development
- Cluster staff aligned to CCGs but not enough
- Some key gaps in structures regarding skills and competence
- Concern regarding split between Delivery and Commissioning Development, creating tension
- Concern that we have the right staff in the right place
- An urgent need to designate accountable officers within CCGs

- National frameworks supporting assurance
- Need to standardise local policies – four into one for easier management
- Concern regarding emergency planning on a system wide basis
- Early identification of corporate governance arrangements needed by CCGs
- Performance monitoring in place and needs embedding
- Practice and CCG benchmarking in place
- Consistent understanding of commissioning cycle to be developed
- CCG OD plans under development and need to inform Cluster OD plan
- IT and business information processes under development to support CCGs
- Authorisation process well developed
- Integration between functions needs improvement
- Decision regarding make, buy or share approach for Commissioning Support
- CCGs feeling “done to” and want us to work with them in their development

- Individual objectives and metrics hard to set against Corporate objectives
- Personal Development Reviews in varying phases across the Cluster
- Metrics focus on delivery of QIPP

- Need to focus on career development opportunities
- Increase commercial and marketing skills
- Provide support for individuals competing for jobs and contracts
- How do we demonstrate being good at the job and be of worth
- Need to increase personal responsibility
- Reassess alignment of staff to CCGs



## OD Cycle Step 2

# Prioritise and focus improvement

- Purpose: Agree with key stakeholders the aspirations of the organisation in terms of its core purpose and what it wants to become. Be aware that this step will feel abstract and conceptual to action-oriented stakeholder, but is absolutely essential to enable the right actions to be taken in Step 3
- Outputs and outcomes:
  - A clear set of capability aspirations / design criteria which describe the kind of organisation you need to become
  - A clear articulation of how the aspirations relate to each other and a set of prioritised capabilities
  - An overall description of the purpose, aims and the OD programme



Prioritise and  
focus  
improvement

**Insight:** Use the data from the previous phase to create clear agreement on the capabilities needed to deliver your strategy and where the greatest need for improvement in capability lies



# Purpose and Outcomes



## Why focus on purpose and outcomes?

- Foundational statement to give the organisation focus.
- Mental creation of the future
- Mobilises stakeholders
- Helps balance competing needs

## Questions to get to purpose:

- What needs to change for success?
- Why? What is at stake?
- What will be different?
  - in the organisation
  - in the world



# Process to get to Purpose



- Define why use purpose statements
- Brainstorm the outcomes required
- Identify key words/concepts from the list
- Divide and draft
- Discuss and merge
- Repeat
- Be patient and stick with it!

**Insight:** The purpose statement must be concise, easily understood, patient focussed and connects with you emotionally e.g. Standard Life statement is “Invest in a better future”



# Capability Aspirations (Design Criteria)



Use design criteria to:

- Clarify understanding and give an objective guide for design decisions to achieve the stated organisational purpose
- Describe needed organisational capabilities
- Define outcomes and success
- Clarify the organisational implications of strategic focus

Define criteria using:

- What will success look like?
- What does our strategic focus mean in terms of organising?
- What do we want to be uniquely known for?

**Insight:** Use the statement: We need a federation that is able to...



# Example – Customer focus



- Strategy - Creating value through providing holistic, customised patient care
- Design Criteria  
(e.g. We need a Federation that is able to...)
  - Build and maintain sustainable primary care services.
  - Build long-term relationships with critical partners
  - Deliver high levels of patient satisfaction
  - Customise patient experiences
  - Provide a holistic package of care with our partners
  - Exploit new digital technologies
  - Create alliances with innovative health care organisations



# OD Cycle step 3

## Agree Key Interventions



- Purpose: Agree the actions you plan to take and the key methods and strategies you will use. This will include outlining the key interventions or streams of work you believe will deliver your desired outcomes.
- Outputs & outcomes
  - Agreed set of interventions and how these contribute to the organisational strategy
  - Shared expectation of how progress will be made and consequences of delays.
  - Stakeholders expectant and actively engaging to begin implementing the interventions.





# Planning Intervention Strategies



In structuring interventions and planning development programmes we should consider several criteria, such as:

- Have a clear intended purpose which is linked to the organisation in its environment and its desired impact
- Have a clear targeted key group and take account of their acceptance of the approach, their role in the process and their skills in implementation
- Be clear about the level of the intervention from personal to whole system
- Choose the depth (risk) of the intervention that is appropriate to build lasting solutions and the capacity of the organisation to change
- Use the approach that will provide the degree of freedom required for the outcomes needed and the right level of involvement
- Pay attention to the covert (hidden) cultural dynamics around power, politics, emotions, assumptions, and defensive routines

**Insight:** think carefully about what type of organisation you want to create and what approach is most congruent with this.



# Types of Interventions & When to Use



Individual	Small group	Team	Large mixed group	Inter-group	Total organisation
Appraisal	Role negotiation	Team building	Visioning	Partnering	Org Design
Coaching	Conflict resolution	Responsibility matrices	Education	MDT development	Whole system planning
Education	Process mapping	Role mapping	LEAN	Handovers	System reviews
		Team chartering	Change management		Strategy Development

**Insight:** Most interventions require joint working with others and not insular working

**Insight:** It is rare that there is a linear relationship between the aspirations of an organisation and the OD interventions that deliver these improvements. More typically 3 or 4 interventions will impact in several areas.

**Insight:** Know when to call on additional support, e.g. for more complex issues, specialist expertise or objective facilitators.



# Planning Federation OD Interventions

## Example



Using the Tricord as a framework, and the example of setting up a Federation the below example OD activities would be developed and agreed by the key stakeholders.

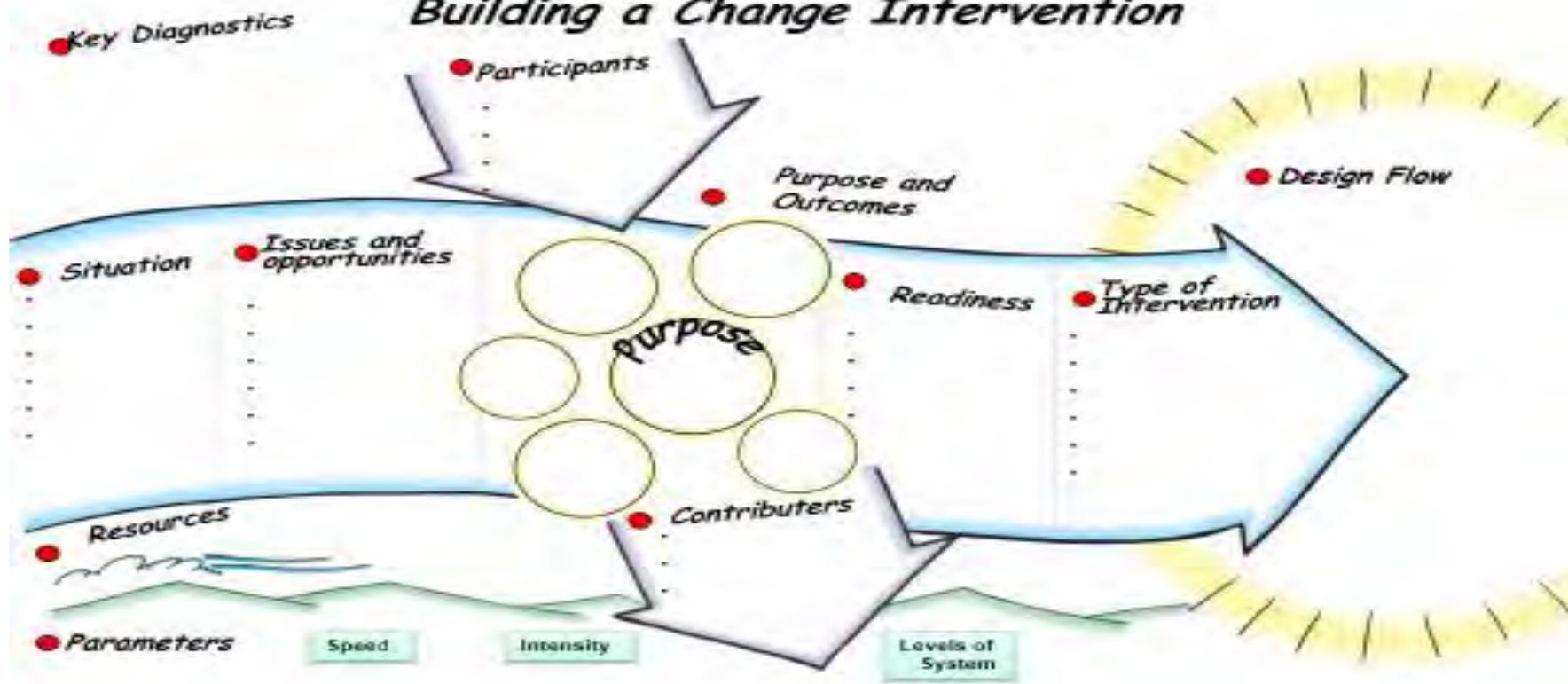
<p style="text-align: center;"><b>Identity</b></p> <ul style="list-style-type: none"> <li>• Agree purpose statement e.g. Be a reliable, reputable and cost effective organisation, making a difference in peoples lives while co-developing sustainable primary care</li> <li>• Decide core organisation values: exceptional care, team working, collaboration, efficiency, transparency, patient engagement</li> <li>• Distinctive branding e.g. Virgin, NHS, MacDonalds, Apple</li> </ul>	<p style="text-align: center;"><b>Strategy</b></p> <ul style="list-style-type: none"> <li>• Agree organisational goals: sustainability, agility, system influence, partnership, safe high quality services, treating patients with dignity and respect, efficiency and economies of scale</li> <li>• Decide core strategy e.g. Creating value through providing holistic, customised patient care with our patients and partners</li> </ul>
<p style="text-align: center;"><b>Systems</b></p> <ul style="list-style-type: none"> <li>• Establish Federation governance arrangements</li> <li>• Decision making processes</li> <li>• Core organisation processes e.g. Winning contracts, Delivering care excellence, Influencing the system</li> <li>• Role clarity and authorisation levels</li> <li>• Incentives and reward, people structures, financial management / reporting etc</li> </ul>	<p style="text-align: center;"><b>Culture</b></p> <ul style="list-style-type: none"> <li>• Explore and understand culture and behaviours</li> </ul> <p><b>Insight:</b> Culture cannot be directly worked on!. However you need to consider how to affect their experiences and behaviours which affect culture through the “visible dimension” activities described in the other Tricord domains.</p>



# Example Template



## Building a Change Intervention



The above template is supplied to help you systematically think through, from left to right, what type of interventions are needed, and planning the design flow of these interventions to deliver the purpose(s) that will resolve the issues or realise the benefits of the opportunities.

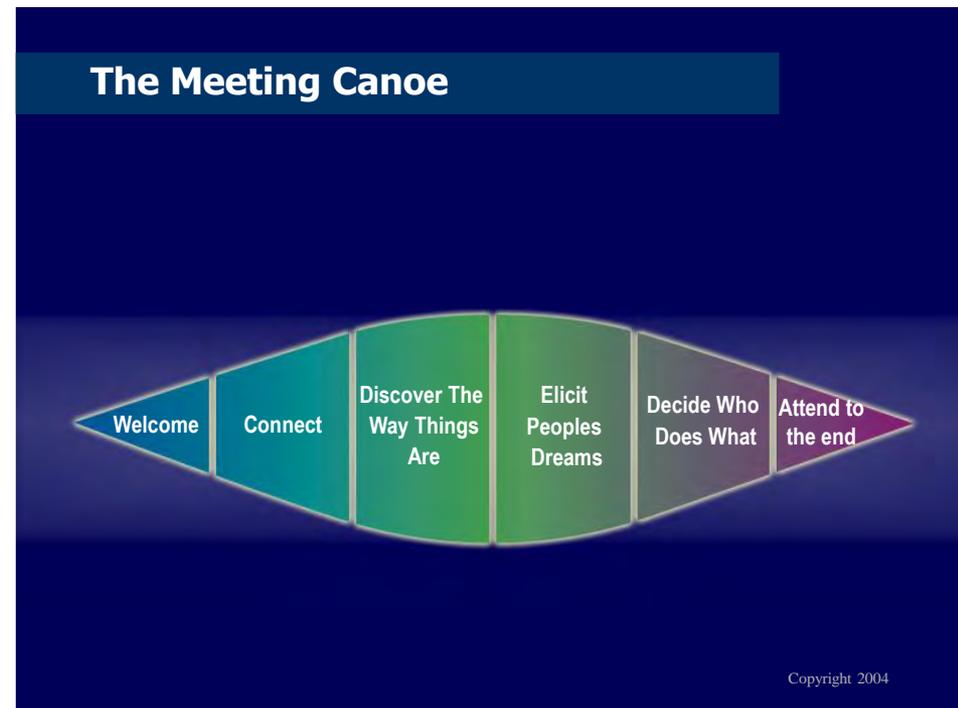


# Meeting / Workshop Planning



To help with the task of conceptualising the work of planning important meetings we have created a blueprint. This canoe shape represents the opening up and closing down of a conversation focussed on delivering a set of outcomes and outputs. It is the container that takes us from the beginning to the end of our time together.

- Start by making people feel welcome
- Find ways to create connections among people
- Discover the way things are—build a shared understanding of the current situation
- Elicit people's dreams—build a shared picture / story of where you want to go
- Decide on who does what to create the future you've agreed upon
- Attend to the end: pay as much attention to endings as you do to beginnings

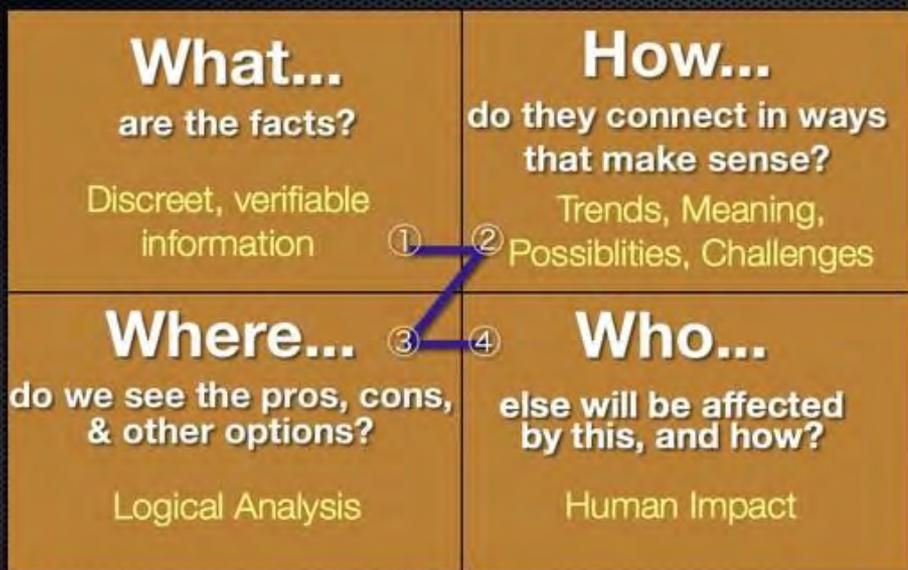


# Decision Making Process



Making decisions with multiple stakeholders is hard! The below process will enable better decisions by focussing on the right facts, considering the options and weighing the impact of a decision on people.

## Decision Z



ROESLER CONSULTING GROUP ©2008

## Leadership Decision-Making Model



More detailed version



# Example Prioritisation Tools

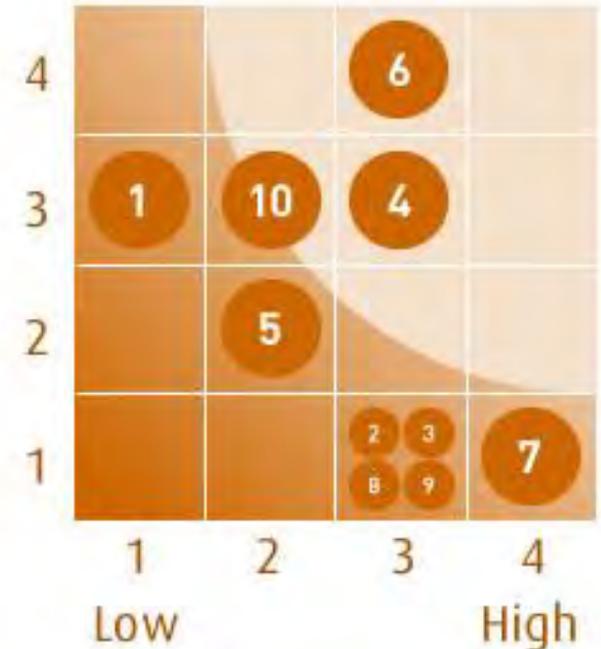


It is important to be able to decide which of the many competing priorities to action at any one time. With limited resources and time only the most important, urgent, doable, most impactful tasks should be focussed on. Two tools are highlighted below though you may choose to create your own using agreed, weighted criteria.

## IMPORTANT

		YES	NO
URGENT	YES	<p>First importance tasks. You have to <b>do</b> them now</p> <p><b>1</b></p> <p><b>Do</b></p>	<p>Tasks to be delegated. Not added-value tasks</p> <p><b>3</b></p> <p><b>Delegate</b></p>
	NO	<p>Tasks you must <b>plan</b> or they'll become urgent (1)</p> <p><b>2</b></p> <p><b>Plan</b></p>	<p>Tasks to be eliminated or they'll become (3)</p> <p><b>4</b></p> <p><b>Eliminate</b></p>

## Impact



## Do-ability

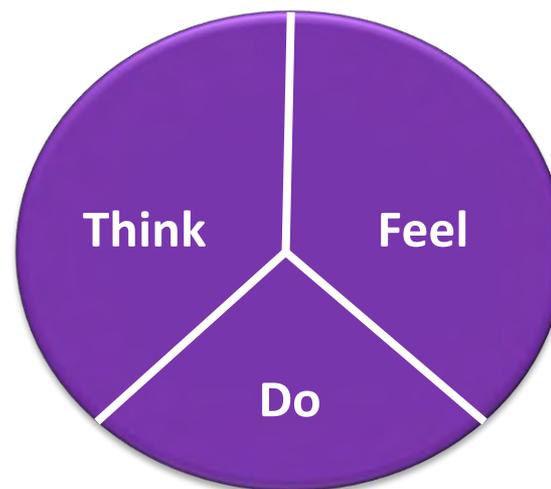


# Additional Helpful Tools

## Mercedes Model of Strategic Thinking

Very briefly please describe:

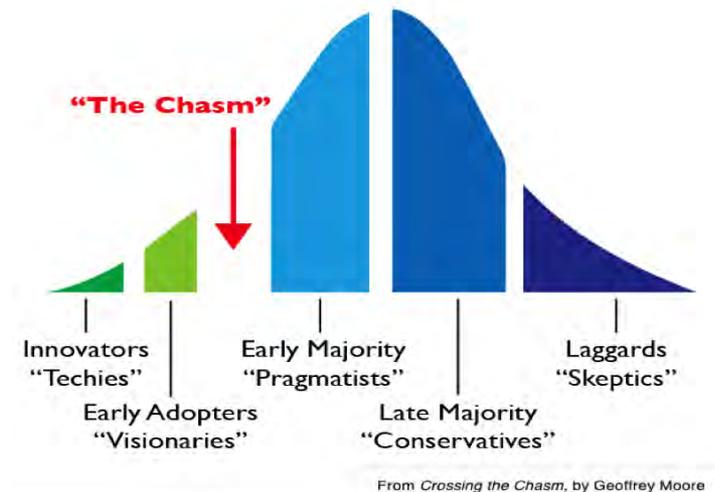
- What are you thinking?
- How do you feel?
- What are you going to do?



## Service Adoption Life Cycle

Cross the chasm between visionaries and pragmatists by:

- Identifying the pragmatists needs
- Understand competition and market dynamics
- Develop service and creating compelling reasons for pragmatists to buy it e.g. huge productivity gains
- Launch the service





# OD Cycle Step 4

## Plan the processes



- Purpose: For each of the key interventions planned this should describe the specific programme of work over the next period. This is the tactical detail of the how the plan will be actioned. It will ideally be done in the form of a Gantt chart showing milestones and accountable people.
- Outputs & outcomes
  - Agreed high level plan aligned to strategic needs
  - Agreed detailed level plans created by engaged stakeholders
  - Momentum taking the programme forward into implementation





# High Level Plan Template



Workstream Name	Strategic need contributing to	Lead / Team	Key activities and interventions	Deliverables – phase 1	Deliverables – phase 2
E.g. Establishing a Board of Directors	Direction and oversight of the Federation	Names	<ol style="list-style-type: none"> <li>1 Agree roles and levels of authority</li> <li>2. Agree method of selection.</li> <li>3. Select Directors</li> </ol>	Board of Director established	<ol style="list-style-type: none"> <li>1. Board meeting regularly.</li> <li>2. Minuted meetings, minutes available to Members...</li> </ol>

**Insight:** High level plans need to be very dynamic and in the early stages may only show key intentions against the key programmes of work.

**Insight:** Detailed plans are best created by engaged stakeholders who have energy and expertise in each of the key areas of intervention.



# OD Cycle Step 5

## Track Agreed Measures



- Purpose: In order to evaluate progress and ensure continuous learning, the whole cycle needs agreed measures to be tracked in a way that they can be fed into the next cycle of planning .
- Outputs & outcomes
  - Agreed S.M.A.R.T. measures
  - Adjustments are made to ensure strategic
  - Capabilities are being developed, the issues are being resolved and polarities are managed
  - Learnings are built into the next cycle, and the organisation improves
  - Patients, commissioners and partners recognise the benefits





# Questions to ask as you measure



Each stage of the process should identify measures that you can track. Bring key people together to periodically review the below questions in an open way:

- Is what we are doing impacting the original issues?
- Are we prioritising the agreed areas and are we developing the capabilities we aspire to?
- Did the key interventions achieve their desired aim?
- Is the approach still aligned with our strategy?
- Are we keeping to the agree plan and milestones?

**Insight:** Keep the measurement simple and focused, track both process and outcomes. Ensure the tracking provides immediate feedback to support the overall emergence of new plans.

**Insight:** Build all learnings into business as usual and future interventions ASAP otherwise these will be lost in the paperwork and daily workloads



# OD Planning Cycle

As reminder, this 5 Step OD planning cycle is built on a learning cycle of planning, delivering and evaluation. The purpose of this cycle is to continuously improve and learn so that the organisation or group can better fulfill its purpose.





TRICORDANT



# End of Toolkit

“Change is constant and our lives are like rollercoasters, the question is whether you enjoy the ride or spend the time screaming!” Ian Andrews

If you have any queries about this toolkit please contact [nick@tricordant.com](mailto:nick@tricordant.com) or [roger@tricordant.com](mailto:roger@tricordant.com)