

Case Study

An Example & Perspective on Teleconsulting



The “What”

Note: The program names and all names affiliated with the case study have been changed for anonymity.

Acme Defense Program is a large, 40 year old, international program with over 2400 employees located at multiple sites. This legacy system is a must in the realm of national defense. In the complex business world today status quo is not acceptable. Budgets are controlled by Congress and there is enormous pressure to reduce costs.

Environmental factors prompting a needed change are three-fold: specific affordability targets to reduce budgets, an inadequate organization structure, and an unknown funding profile. According to Myles in an ideal future state, the Acme Defense Program would have appropriate levels of leadership, better alignment within the program, appropriate staff (right capability & skill mix), organizational strength, and flexibility to meeting changing needs.

The “Who”: Roles Important to Teleconsulting

There were four critical roles in Acme Defense Program organizational redesign. The first was the client. The other three were the OE consultant, her leader, and the HR business partner. We'll focus on the latter three for today's discussion.

After Jenny, the consultant, and Diana, the HR business partner (HRBP), discussed the request, Diana agreed to support the effort. They later had a meeting to discuss details of the support.

The conversation started with skill sets and experience.

Skills & Experience

Diana, the HRBP, is known for her ability to facilitate substantially-sized groups on complex topics. After having recently completed an OD academy and project with her local director, Jami Wong, she has good baseline experience in organizational redesign. She can also think strategically when needed. Diana wants to expand her knowledge and experience with organizational redesign. Diana has grown children and is able to travel freely from her office based in an East Coast, as long as the travel requirements don't interfere with her daily job.

Jenny, the OE consultant, has had experience on several large-scale organizational redesigns in her 7-year tenure as a consultant in the company. She is known for her ability to communicate in order to build partnerships and trust. She has had a strong existing relationship with the client, Myles, for 2 years now. He often calls her for impromptu consultations when he needs to think through a tough challenge or bounce around ideas. Jenny is unable to travel for 6 months but is working full-time from her home office in New Orleans, Louisiana.

Gail, the OE manager, has also had experience with organizational redesigns and is trained to the model that both Diana and Jenny know. She was nominated and selected as an outstanding leader by her team for her ability to engage and empower her staff. Her 20+ years of OE experience and progressive mindset leads to her full support of a virtual OE model. Gail operates from her office in Sunnyvale, California.

The conversation then followed with a discussion about roles to support the effort. After Diana and Jenny discussed and agreed to the roles listed in this section, Jenny contacted Gail and relayed the agreements discussed.

Roles

Jenny:

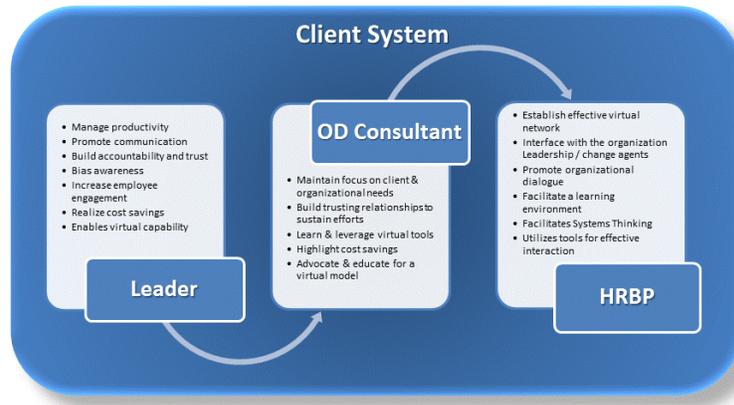
- Co-consultant to the organizational redesign effort
- Initial point of interface with the client, Myles, to contract on the request
- Shadow consultant on design/process to Diana through regular tag-ups
- Provide co-facilitation through virtual attendance at key engagement meetings where needed
- Follow-up point of interface with the client to assess effectiveness of support

Diana:

- Co-consultant to the organizational redesign effort
- Lead facilitator
- On-going main point of interface with the client while effort is underway
- Engage collateral team members as needed
- Connect the OE work systemically in all aspects of HR management
- Infuse the language of change management in dialogue / counsel
- Demonstrate positive can-do attitude; chief cheerleader

- Gail:

- Leader to OE consultant on the effort
 - Responsible for quality and delivery of OE services for all programs in the company
 - Support to OE consultant as-needed, including removal of organizational barriers and supporting Jenny in her virtual work
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The Virtual Consulting Model

Jenny and Diana reach out virtually to Diana's Sr. Manager, Amy, who is also a member of Myles leadership team. She is aware of the client's need and fully supports leveraging Diana's experience with Jami Wong's organizational design efforts. This expanded scope on Acme Defense Program will provide development opportunities for Diana that she can fully support. All parties come to an agreement of mutual support for the client.

Diana and Jenny meet virtually with Myles. He is an ideal client; one who has operationalized a self-assessing change initiative and supported Jami Wong in her organizational design efforts. He is familiar with the tools and processes.

Both Diana and Jenny are trained in the same organizational design process, a six-step approach that involves engaging a design team in developing the final solution set.

In the initial meeting, Myles stresses the importance of this org redesign effort. It is important for all parties to be on the same page in terms of understanding the following:

- Why change is needed (business case for change)?
- What needs to be accomplished (desired outcomes)?
- Who is responsible for what (roles and responsibilities)?

Jenny and Diana meet regularly to strategize, review design and hone the process. Diana agrees to be the in-person facilitator. Jenny joins the program org design team virtually as

needed. Some team members attend virtually as well so they readily accept and leverage Jenny in that frame.

Myles and his leadership team agree to follow the process and establish a timeline to implementation. The team meets together and in sub-groups specifically on organizational redesign for a total of 100+ hours over several months. Each step of the process requires learning and action. Each session is evaluated for effectiveness.

Preceding each organizational design meeting, Jenny and Diana connect via phone or webcam to collaborate on the agenda. After each session, they capture lessons; what worked, what did not go as planned and what desired outcome was achieved. Inclusive in this step is engaging Myles to ensure they are meeting the needs of the team. Either Jenny or Diana would tag-up with him to get his feedback on how the session went.

Staying true to the consulting process ensures that Jenny and Diana remain on track. The Redesign Roadmap overlay the consulting process with the framework of strategic change and the OE competencies necessary to ensure success.

The Outcomes

Jenny scheduled a teleconference with Myles to discuss his feedback on the process and services provided, as well as to get his view of the outcomes and business impact of the redesign. Although Diana could not make the meeting due to vacation, she provided Jenny with her questions for Myles and they scheduled a tag-up after Diana returned to discuss next steps.

Myles was very pleased overall with the process and the outcomes of the redesign. The leadership team met their goal of \$150M in cost savings in the next contract year of the program.

According to Myles, the program had made some significant headway with changes to their organizational structure. The redesign team found that there were two organizations that served in overlapping roles for the aging program, and therefore, collapsed two departments into one. They also reconfigured one organization on the program that had grown substantially and needed to be split into two functions to better serve the business. The team was in the process of selecting a new leader for the split out function and combining the collapsed organizations' two director roles into one.

Although the changes to the organizational structure were significant, Myles wants to see another phase of changes to the next level down to make sure the program is operating with the right staff and structure at multiple levels.

The leadership team had made significant changes to their business rhythms and communication habits based on the organizational redesign. As a result of the discussions, the leadership team agreed to clear their calendars for daily tag-ups to discuss emerging issues on the program. They developed a dashboard system to track important issues and work them to

resolution. The team also started meeting every two weeks for two hours for strategic items. They agreed to clear their calendars from tactical meetings in order to make space for employees' emergent needs. Essentially, they created more time to lead.

The effort had a "big impact on the customer" and improved their perception of the program leadership. The costs savings would take a major burden off of them as they faced budget cuts on Capitol Hill.

Myles gave special accolades to Diana, acknowledging the difficulty of leading such a large and dynamic group. She was given a special recognition award for her consultation to the effort.

Myles and Jenny agreed that OE support would be given for the next phase of the effort, which included a review of all of the director's organizational structures for potential changes. He also asked for support with helping leaders with the on-going communication on the change.

The engagement was a "win" for the OE function and a showcase of capability. It was a "win" for the program in meeting their business needs. And, it was a "win" for Diana, Jenny and Gail as they all learned and grew through virtual venues.

Follow-Up

Myles has since been very engaged with the OE function since the organizational redesign. There is an on-going weekly discussion with Jenny about the elements of the design as they are implemented.

Diana and Jenny stay in frequent contact. They have found other projects in which to partner, adding value to the symbiotic relationship and to the organization.