

6 Keys For Stand-Up/ Re-Positioning a Shared Service

DEVELOP THE VISION AND PURPOSE

- Envision and Establish the Why
- Develop a Charter
- Detail the Purpose & Goals through:
 - Organizational Value Proposition
 - Business Case
 - Scope of Services



PLAN HOW GOALS WILL BE MET

- Outline the strategy and technology that will be used to meet the goals
- Identify key competencies and tools
- Lay out key work processes required
- Identify Key Performance Indicators (KPIs)
- Identify the number of people-sized bundles required (jobs)
- Use Project Portfolio Management



DESIGN THE ORG STRUCTURE

- Create jobs based on logic (departments)
- Link bundles of work (hierarchy, teams)
- Key activities: Create roles/responsibilities, measures, compensation payoffs (performance mgmt), employee value proposition and career path, RACI charts



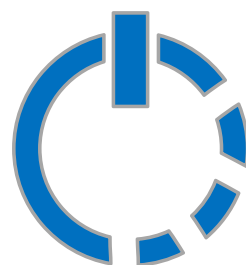
ORG CHANGE MANAGEMENT (LAUNCH)

- Obtain senior support
- Plan robust training and mentoring
- Tools include:
 - Internal Engagement Plan
 - Stakeholder Engagement Plan
 - Team building



START-UP PHASE

- Staff the organization, build contracts, and begin operations
- Assign project pathfinders (finding projects)
- Monitor feedback
- Revise organization based on natural pathways that energy (re-alignment)



SUSTAIN OPERATIONS

- Review and improve competencies
- Manage budgets and resources
- Communicate and ask for feedback
- On-board new hires to align with culture

