

# THE DESIGN STAGE OF A NEW COLLABORATION

## When the business case is signed off, what then?



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*In the design phase, there are so many things to consider; not least making sure that the new service is capable of delivering, at the very minimum, everything that has been put forward in the vision document and business case.*

I believe that translating the business case into a brand new shared service is one of the most exciting parts of any collaborative process.

We have to accept that some things are often decided during the development of the business case as they have to be included in the numbers. For example, identifying the building you will operate from and its costs.

However, many other things can be designed into the operating model of the planned service to give it a whole new look and feel. A new, lower-cost, better way of working.

This is especially important when creating a shared service from existing functions in two or more organisations, because if the new workplace too closely resembles just one of the existing donor sites, it starts to feel like a takeover rather than a merger.

Professor Rosabeth Moss-Kanter, one of the world leaders in shared service and merger research, is clear that in moving to the new service, a design should be created which is not identified with either legacy organisation, removing issues of territory and potential conflict<sup>1</sup>.

In the design phase, there are so many things to consider; not least making sure that the new service is capable of delivering, at the very minimum, everything that has been put forward in the vision document and business case.

In my experience, making a checklist containing as many of the different elements that you and your collaboration partners would like to consider, is a great starting point. An example of a checklist you might end up with is shown in the table on the next page.

Working through each of the elements, you might generate more checks, or end up removing some from the list.

<sup>1</sup> Moss Kanter, R. (2010, October). Mergers That Stick. *Harvard Business Review*, 121-125.

The important step is to tailor the checklist to suit the requirements of your unique shared service programme.

Once you're happy with the list, you can start to allocate 'ownership' for the delivery of each of the elements and develop a project plan, incorporating time-scales and dependencies, to ensure you will be ready for business *in advance* of your target date.

Of course, someone will have to take agreed ownership of the overall project plan to keep everything on track - and this should be on a full-time basis and not on top of their day job.

You'll feel a great sense of achievement when you're ticking off the tasks as they're completed. This also gives you the opportunity to identify issues and conflicts at an early stage and develop resolutions and communication strategies to keep your plan on track.

Being able to demonstrate that the new arrangements are a success is essential, so you will need to build in processes to enable you to measure performance from the outset.

If the work that the new service will be carrying out is currently being done by the partner organisations, or elsewhere, be sure to measure the tangible outputs as they stand before the date of transfer.

This data will act as the benchmark against which you will be able to compare results and show the progress made when the work moves to the new service.

This will enable the leadership of your organisation to safeguard the collaborative journey, by communicating the success of the new, better, lower-cost service, in comparison with what went before<sup>2</sup>.

<sup>2</sup> "...issues such as purpose, membership, power, leadership and identity of a shared service need to be negotiated, nurtured and managed continuously through the collaborative process. Huxam, C. And Vangen, S. (2005). *Managing to collaborate: The theory and practice of collaborative advantage*.

## An Example Service Design Checklist

Identity	Operating Model	Organisation	People	Processes
<ul style="list-style-type: none"> <li>● What is the history of the creation of the organisation?</li> <li>● When is it to be established?</li> <li>● Where is it to be located?</li> <li>● What is the organisation's vision for the future?</li> <li>● What is its purpose?</li> <li>● What are its objectives?</li> <li>● What are the key principles of how it will operate?</li> </ul>	<ul style="list-style-type: none"> <li>● What is the operating and service delivery model?</li> <li>● Which parts of the service will sit in the shared service organisation and which will sit within each partner's organisation?</li> <li>● Where will staff and managers be sourced from?</li> <li>● What are the customer contact channels and what percentage of queries are expected to be resolved by each channel?</li> <li>● What will be in the service level agreement with partners?</li> <li>● What is the scope of any third party involvement?</li> <li>● Which ICT systems will be used for what?</li> </ul>	<ul style="list-style-type: none"> <li>● How will it be structured and who will lead which parts?</li> <li>● How are the teams to be organised – what are their functions and which are generalist or specialist?</li> <li>● How will the service be managed?</li> <li>● What are the service management relationships with the partners?</li> <li>● What are the agreed service levels and success metrics – have benchmarks been set?</li> <li>● What service charges and penalties will be in the service level agreement?</li> <li>● What are the business continuity arrangements for the service and the ICT systems</li> </ul>	<ul style="list-style-type: none"> <li>● What is the culture of the new organisation – key values and behaviours?</li> <li>● What are the key workforce competencies?</li> <li>● How will staff be recruited?</li> <li>● How will staff be trained and developed?</li> </ul>	<ul style="list-style-type: none"> <li>● What are the shared service processes – how are they illustrated in process maps?</li> <li>● What help will customers get to understand the processes and effectively engage with the organisation?</li> <li>● What reports will be produced - their purpose, content, audience, timing and frequency?</li> <li>● What are the standards for data and document management – including retention and destruction policy?</li> <li>● How will information be stored and accessed?</li> <li>● What are the security standards (segregation of duties, data security, systems access, system validation, etc.)?</li> <li>● What are the audit checking regimes?</li> <li>● What are the processes for audit reporting and management?</li> </ul>