



Strategy @ Speed: A Case Study in the NHS

Introduction

Tricordant were engaged in October 2016 by a major Government Arm’s Length Body to facilitate the Senior Management Team to develop, at pace, a strategy for Ministerial approval, which had been timetabled for January 2017.

Austerity measures in public services and the rising cost of operations had combined to create the perfect economic storm for the Chief Executive and top team. The Board had recognized the need to realign strategically their resources, products and services to support and deliver the Government’s policy agenda. They faced the added complication of the ALB comprising 3 previously independent organisations.

Our Approach

To develop the shape and content of the strategy we facilitated a series of 5 x 3 hourly workshop sessions for the 9 members of the SMT between mid-October and early December, focusing on the themes described in Figure 1.

Our focus in the workshops was clearly on co-creating the strategy **with** the SMT, and doing so in a developmental way for the newly formed team.

We used a range of classic strategy development tools in combination with Organisation Development and Design methods along the way. We will highlight here only those which most helped them get unstuck when the complexity became overwhelming or significant differences of view emerged.

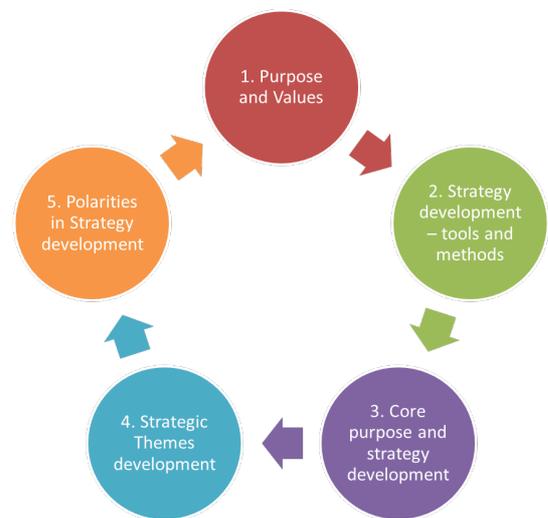


Figure 1

Purpose and Vision – Differentiate to Integrate.

Finding the common purpose of 3 previously independent organisations, was the first tricky bit. Previous attempts to “integrate” had met resistance based principally on fear of loss of identity.

We used Distributed Network concepts and language first to differentiate the 3 Primary Functions (figure 2) in the organisation so they could then integrate the whole by finding their common sweet-spot.

Classification of Work Teams in a Structured Network

-  • **Primary teams** are the network of work teams that directly deliver the primary functions of the organisation.
-  • **Facility teams** maintain substantive, critical facilities or resources in readiness for use by those managing the primary.
-  • **Support services** provide local, non-critical support services to all teams. They aim to do this cost-effectively and responsively.
-  • **Connective teams** own the governance of critical resources on behalf of the corporation (policy, human, financial, knowledge and information). They provide the framework, systems, standards, protocols and procedures for all other teams to work with and through (e.g. HR, IG, Finance, etc.).
-  • **Board / Parent** carries out the high-level corporate governance, policy and coordination on behalf of external stakeholders



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The introduction of Polarity Thinking, identifying the polarity of Continuity **and** Transformation as key to development the strategy, was the final break-through to unstick the work. Through the Polarity lens the team could see how to leverage the benefits of both continuity and transformation, and the also the pitfalls of both poles. In turn this led to the development of a clear dual track strategy. The graphic in figure 4 shows the completed Polarity Map after iteration and completion by the next level of leadership.

Outcome

The outcome of the work was a strategy developed at pace, from initiation to Secretary of State approval, in 3 months.

Critical to their success was the client team fully engaging in the work, and driving the internal work in between the workshops with their teams to fill the gaps and detail.

The Client View

The ALB Director of Finance and Corporate Planning commissioned the project and commented:

The timescale was very challenging and the ask was quite (over?) ambitious, with individuals finding it quite tough at various points. Tricordant were great in keeping us focused on the key matters, bring their experience and techniques to get us thinking more creatively, and also tackle some sensitive issues in a constructive way. SMT availability was always a challenge, and as the programme proceeded we had to adapt the plan.

Without their support, guidance (and at times, direction!), I doubt whether we would have got as far as quickly – for the first time we have created a way of describing what we do that enables us to structure and present our plans in an integrated way. We have achieved the key targets of producing a strategy and business plan by the deadline, and have opened the door to deeper conversations about how we work together as a team. It feels like a step change has been made, and some testing with staff in follow up sessions is validating the direction of travel.

If you have any queries, would like to learn more about this case study or would like Tricordant to help your organisation please contact: Roger Greene, Tricordant Ltd, roger@tricordant.com, Mobile:07722 369972.