

The Challenge

Ask anyone in an organization what the training and development department does, and they will likely give a reasonably accurate and informed response. Clients, stakeholders, leaders, and staff members have been taught that when a person or group isn't performing as expected, that they must need "training" to level up their skills. They are used to requesting, receiving, delivering, and attending training managed by the training department. Under these circumstances, the mission of training and development departments is crystal clear.

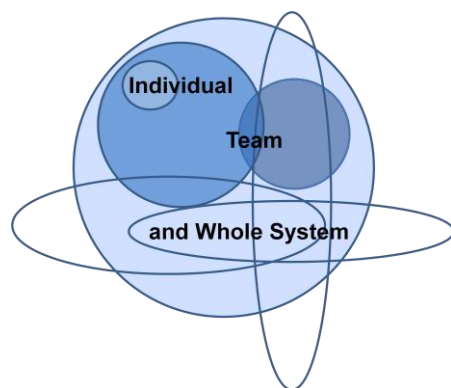
However, when internal organization consultants talk about the mission of their department including "change management," "performance improvement" or "organization development," they are often met with blank stares by their colleagues. It is obvious to practitioners in the field that training alone does not solve every problem or performance gap. This is the very reason why many traditional training departments naturally morph over time into organization development units. However, these transitions can be difficult for customers until they understand and experience the value that OD, in addition to training solutions, can bring to the organization.

The following steps are components of making a successful change and transition from training and development to organization development, and they are derived from lessons learned in building internal OD functions within manufacturing and financial services companies.

► **Step 1: Clearly identify the work of the OD unit**

Assuming that there is already a compelling purpose, mission, vision and support for an OD function, the first step in building a team is to determine what the work will be for the new unit. Think about the levels within an organization that can benefit from OD interventions. Will the OD practitioners focus on individual, team, or whole system solutions? Will the OD practitioners lead change projects, or develop tools and methodologies to educate others leading change? Will the OD practitioners coach or shadow consult on important organization-wide projects? In essence, how will the organization view this team: as leaders, doers, coaches, teachers, or consultants? Will the scope of services change over time?

Any of these are appropriate roles and work assignments for an OD team. However, it can be overwhelming to commit to everything at once. Spend time planning for what the OD team will tackle, at least initially. Then, determine how the group's services and roles might evolve over 1, 3, and 5 years. This upfront planning will help you determine what skill sets you need on the team, and what development plans to put in place for team members selected for these roles.



Levels of Intervention within Organizations

Individual - Career development, mentoring, coaching, performance improvement, leadership development, learning solutions

Team – process redesign and improvement, coaching, team development, problem solving, project management, facilitation, learning, change management, change leadership

Whole System – strategic planning and implementation, process redesign and improvement, organization redesign, change management, change leadership, culture change

Step 2: Determine what the jobs will be in the new OD unit

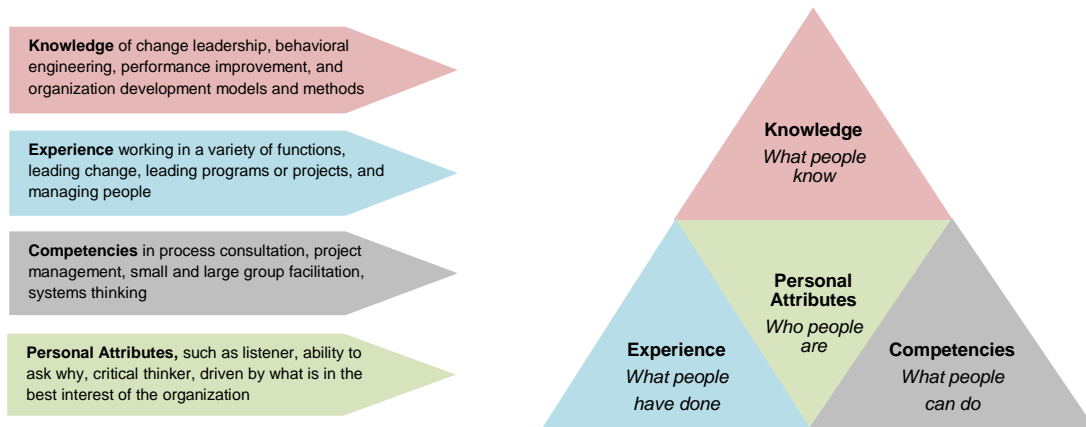
Once the work of the unit is clear, it should be much easier to determine how to break up the work and what type and number of jobs will be needed. Create job profiles that specify the knowledge, experience, competencies, and attributes needed for success. These will prove useful for any subsequent staffing or selection processes and decisions.

What are the assumptions about who will staff the unit? For example, is it a given that staff members with a training and development or HR generalist background will be grandfathered into OD roles? Is it assumed that all the necessary competencies for OD work can be trained? Will there be different types of roles on the OD team, such as analysts, project managers, and senior consultants? If so, what are the differences in roles and responsibilities between these jobs?

Remember that the job profile is the organization’s set of expectations for each person’s job. Selection processes are pointless if they don’t help find the best candidates who can deliver on these expectations.

Components of a Job (“Success”) Profile

“Success Profile” is a term created and used by Development Dimensions International.



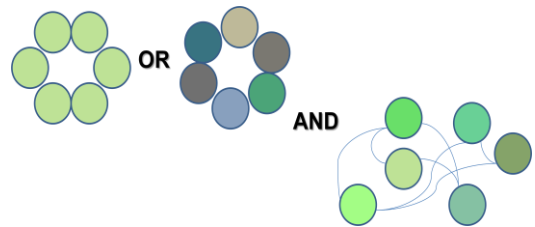
Step 3: Determine the Team Mechanics

The type of work that OD practitioners do can be vast and complex. Even after narrowing down the work of the unit, it is important to determine the basic philosophy of the team. For example, some OD departments purposefully develop staff members to be specialists in delivering different types of interventions. There may be a few team members focused on coaching, leadership development, and mentoring programs, all of which are targeted at the individual, while others are more adept at facilitating large scale change processes across the enterprise. When a customer need arises under this model, the team members assemble a consulting team with the right blend of specialties to assist in that particular situation.

On the other hand, there may be merit in having everyone on the team deliver the same basic services but to different customers or lines of business. This model is similar to the popular HR generalist model in place in many organizations. With this model, the development of deep technical expertise in any one

area is not necessarily an explicit goal of the group. Rather, applying superior consulting skills and adopting common tools, frameworks, and methodologies are emphasized in the development of the team.

Regardless of which philosophy is chosen, the team must determine how it will *link and coordinate their work*. In a team of specialists, it will be important to keep the team connected so that individuals avoid the trap of approaching all client interventions through the lens of their specialties, or in becoming territorial about clients or projects because of the type of intervention that is required.



Similarly, in a team of generalists, affinities for certain types of work can and will arise naturally over time. The team will need to be flexible enough to recognize this development of specific skills and interests, and find ways to share those talents across customer groups.

Involve the OD team in the process of researching and creating common methodology for the group. This helps build ownership and is a great way to start building relationships amongst team members.

► **Step 4: Start Re-branding and Marketing the Services of the OD Function**

For many organizations, OD functions help broaden the services already available in training and development departments. Customers will need to understand what the new department can offer that is different. The following is a list of tips and strategies for marketing the new identity of the group:

- **Build an Ally and Advocate Network.** Educate others about your unit's mission. Pay particular attention to those doing overlapping work such as HR business partners, business analysts, process improvement and change management specialists.
- **Facilitate Key Organizational Initiatives,** such as improvement projects, organizational surveys, or responses to crisis situations that could use skilled facilitation. Taking a leadership role in high profile and important projects will demonstrate the "new" capabilities of the unit.
- **Create an Advisory Council** of internal clients who can help set priorities for your team based on the greatest needs of the organization. These individuals will support, direct, filter, and prioritize the work of the OD function.
- **Identify Low-Hanging Fruit** or quick win projects that demonstrate your new way of working and the value of your team's perspectives.
- **Leverage All Available Data,** such as surveys, performance measures, strategic plans, leadership speeches, and key projects to learn about the major issues and initiatives customers in the organization are facing, managing, and leading.
- **Start Changing the Conversation,** one interaction at a time, by helping clients get clear on the purpose and outcomes for their projects. Fight the urge to just "give them what they ask for." Always ask them, and yourself, "Is this activity (project, direction, decision) in the best interest of the organization?"
- **Access your Ignorance** by asking good questions and demonstrating an insatiable curiosity when talking to customers. You are not an expert in their business; let them teach you about their world.
- **Check Your Progress** periodically. Set milestones and targets and keep track of accomplishments. Don't be afraid to publish and share this information.