



LEADER *Shift*[™]
INSIGHTS

STRATEGY TOOL

TEAM/FUNCTION/BUSINESS UNIT NAME

Explain how your strategy was built and who has had input. For example...

The work presented today is a result of a 3-months assessment. It represents a strategy, relevant tactics and education around the marketing function. To date, we have feedback from the following:

List of Names

It has also been presented to the HR, HR Operations, and Business Leadership teams to get feedback on tools needed and their prioritization.

We are recommending a **phased approach** that will provide *[Explain the value this group will add]*

TEAM/FUNCTION/BUSINESS UNIT NAME

Definition:

What is the value this team, function or business unit do for the business?

Why does it exist?

Purpose:

To provide:

- *What does this team deliver to the organization?*

Consulting and Capability Services [if relevant]:

- *What services does this team provide?*

WHO WE ARE/ARE NOT [COE EXAMPLE]

Who We are ...

Subject Matter Experts in:

- ✓ **Leading and Enabling Change/Transition**
- ✓ **Organization Development**
 - Organization Design/Job Design
 - Creating alignment
- ✓ **Team Effectiveness**
 - Driving High Performance
 - Visioning
 - Strategy
- ✓ **Group Facilitators**

We are Focused On...

- ✓ Aligning People to Business Strategies
- ✓ Creating breakthroughs in performance
- ✓ Building Change Leadership Skills & Culture
- ✓ Building OD Capability
- ✓ Strategic Involvement and Consulting
- ✓ Long Term Sustainment of Critical Changes

Who We are Not ...

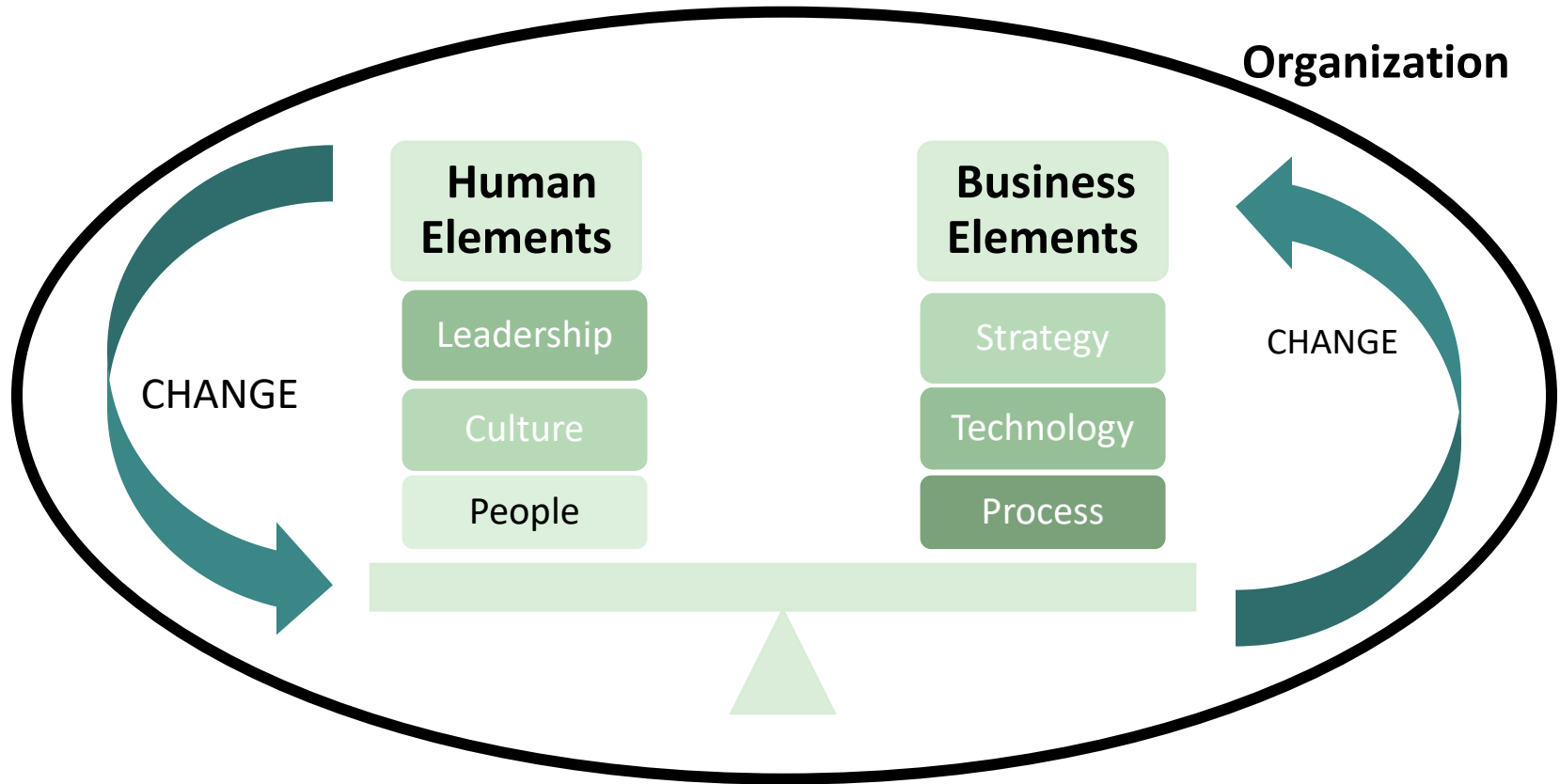
- ✗ Business Project Managers
- ✗ Business Process Owners
- ✗ “Additional Resources”
- ✗ Business Content Experts
- ✗ Metrics Owners / Providers
- ✗ Firefighters

We are Not Focused On...

- ✗ Reactive Engagement
- ✗ Change without a Business Case
- ✗ Providing Solutions without Problems
- ✗ Activity for activity's sake
- ✗ Owning Recurring Meetings

USEFUL GRAPHIC THAT SHOWS HOW FUNCTION WORKS

[Use if relevant, particularly good for a center of excellence (CoE) or support function]

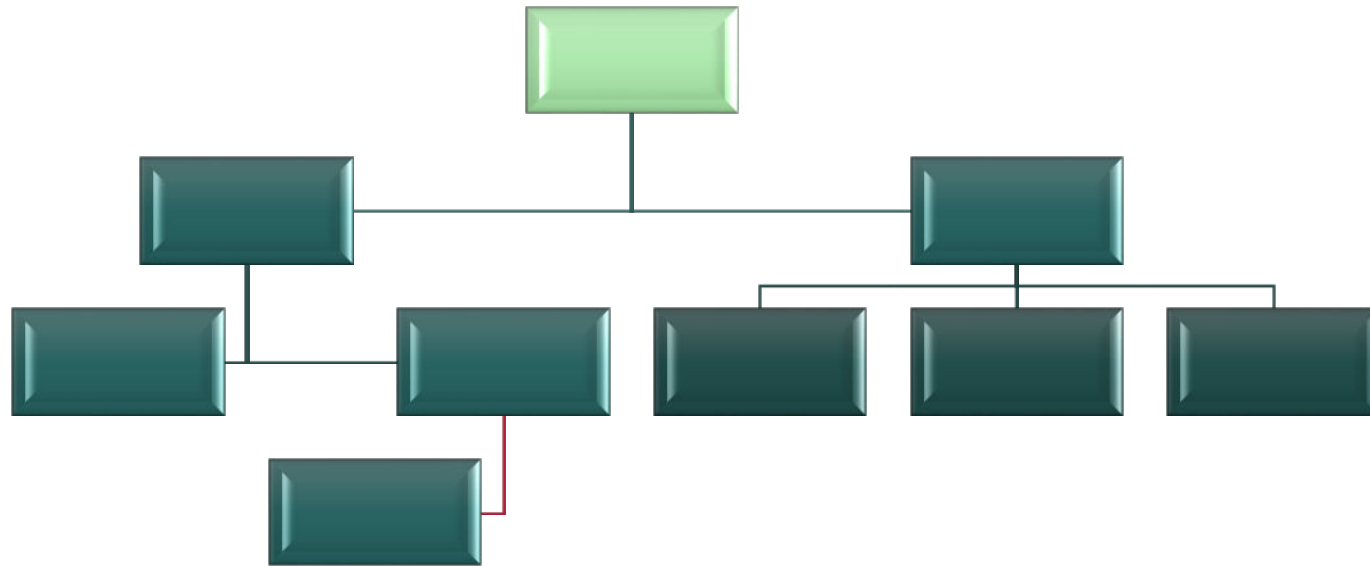


An aligned and balanced system has:

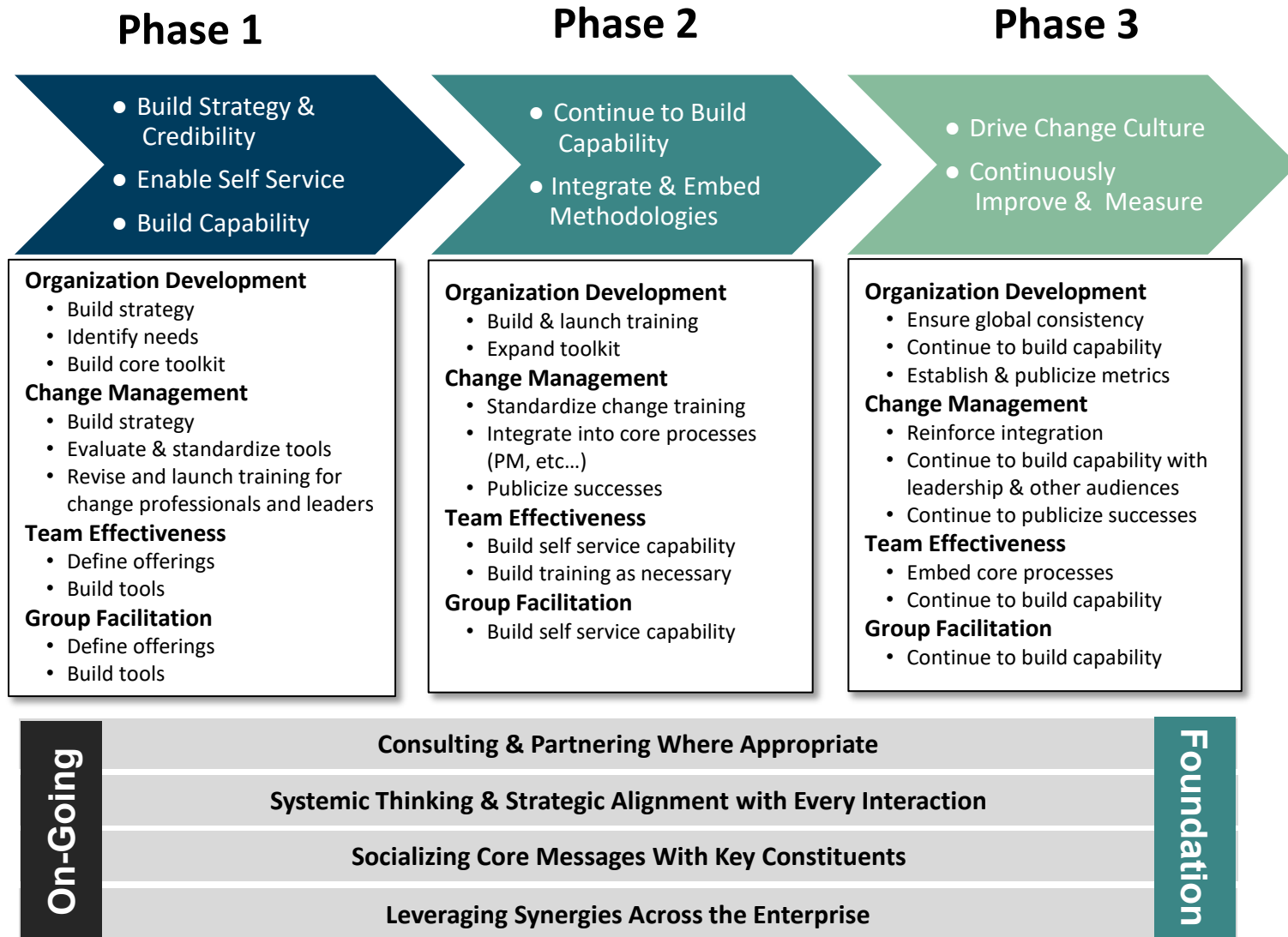
- *Engaged employees*
- *Shared vision*
- *High performing teams*
- *Reduced risk.*

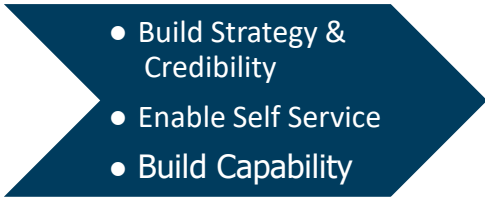
ORGANIZATION STRUCTURE

Include as much information as possible about who to go to for what



3 PHASE STRATEGY [COE EXAMPLE]





Build function from scratch

Align, integrate & improve

Available Before The Transaction Date

Organization Development

- Build overarching strategy and guiding principles either company can leverage
- Identify need for tools, support & consulting to prepare for the future
- Build toolkit to promote self service and begin building HRBP capabilities
 - Visioning & Strategy ▪ Leader Check-In
 - Organization Design ▪ RACI

Change Management

- Build strategy including clear definition and multi-year phased-in global approach
- Build community of practice
- Identify tool gaps and needs
- Evaluate tools being used & standardize in one place
- Build (revise) and enhance change management training

Available After The Transaction Date

Team Effectiveness

- Build strategy for use of tools (MBTI, HBDI, Hogan, etc... & interventions)
- Assess needs in this space (What are we solving for?)
- Build tools to promote self service and begin to build HRBP capabilities
- Integrate Team Effectiveness Toolkit

Group Facilitation

- Build strategy and define scope
- Build/buy tools to promote self service and begin to build HRBP capabilities





Organization Development

- Build & launch training for key OD needs
- Expand toolkit to increase self service and build capability in additional areas

Change Management

- Enhance change management training
- Work with L&D to build modular training for multiple audiences
- Standardize & launch training for change professionals & leaders
 - Project managers
 - Leaders of others
 - HRBP's
 - Change managers
- Integrate into core processes and training (Perf. Mgmt., Proj. Mgmt., Orientation, etc...)
- Publicize successes
- Begin to identify measures of success & sustainability

Team Effectiveness

- Identify what we are often asked to 'solve for' in team situations
- Build self service capability to solve frequent team issues
- Build training to support self service and build capability of HRBPs

Group Facilitation

- Build self service capability and train HRBPs on key areas



PHASE 3

- Drive Change Culture
- Continuously Improve & Measure

Organization Development

- Drive global consistency
 - Tools, methodology, approaches
 - Identify ways to drive global collaboration
- Continue to build capability of HRBPs in core areas
- Establish & publicize metrics

Change Management

- Reinforce integration in identified areas (Perf. Mgmt, Proj. Mgmt., Orientation, etc...)
- Integrate core change skills into core HR processes (performance management, TMR, etc...)
- Standardize and launch training modules for leadership & other audiences
- Measure & publicize successes and sustainability

Team Effectiveness

- Embed core processes and establish a team effectiveness baseline metric
- Embed a common language around personality type how people interact
- Continue to build capability and reinforce/enhance self-service

Group Facilitation

- Continue to build capability and reinforce/enhance self-service
- Focus on enhancing skills and revitalizing techniques



The following is being packaged for roll-out:

Organization Development

Organization Design Toolkit

- Successfully piloted
- In final stages of development

RACI Toolkit

- Successfully piloted
- In final stages of development

New Leader Assimilation

- Toolkit existed, but was not rolled out
- Will be formally rolled-out with launch of OD Tools

Coming in Q3:

- Visioning/strategy tool
- Team Effectiveness strategy & tools

Change Management

Simplified Change Tools

- Stakeholder Transition tool being piloted with NewCo Integration
- Inventory complete – > 20 tools identified in > 10 places globally
- Reducing to < 5 standard, simplified tools available in 1 place
- Will be launched with change training
- Focus on the story vs. the form

Revised Change Training

- Partnership with L&D
- Focus on HOW to navigate/manage change and refresh the model
- Audience = HRBP's, to use where appropriate
- Summer Series
 - 2 video modules
 - 1 live meeting refresher
 - 1 live meeting tools training

ANTICIPATED TIMELINE [COE EXAMPLE]

Task	Audience	June				July				August				September			
		Week				Week				Week				Week			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
Change Core Tools identified and revised	All Employees	█	█	█	█	█	█	█	█								
eMail from sponsor stating re: new tools are coming and will be broadly communicated to user organizations; this can be forwarded by BTO's/PMO's	BTO, EPMO, EUBTO	█	█														
Update/Refresh Change Management Website	CCE	█	█	█	█	█	█	█	█								
Messaging re: Change Management Tools available in July in Q3 HR Planner	All Employees		█	█	█												
Preview new OD tools (org design toolkit, RACI toolkit, new leader assimilation); Global Kickoff announcing change training dates (TBD) and new change tools	HRBPs					█	█	█	█								
Post Core Tools and Optional Tools on new Change management Site	All Employees					█	█	█	█								
Post all OD tools to Inside HR teamsite; link to OD / Change Management Sites	HRBPs					█	█	█	█								
eMail from sponsor announcing new tools are available and expectations going forward; this can be forwarded by BTOs/PMOs	BTO, EPMO, EUBTO					█	█	█	█								
Change and Transition Management PDI Ninth House Training	HRBPs							█	█	█	█						
Change Management Refresher and Tool Training - - Live Meetings. 4 sessions over 2 weeks	HRBPs									█	█						
Reminder of Tools Available in Q4 HR Planner	All Employees													█	█		
Change Training available to business at HRBP discretion	Employees at HRBP discretion																█
Scheduling TBD																	