Customise the implementation components and define the schedule

Context

In Task SETUP01, your executive team developed a project charter and high-level plan to ensure overall clarity of purpose, expectations, scope and impact of the implementation.

In this task, you will conduct an audit of your Management Operating System (MOS) to highlight current state issues, and allow you to make evidence-based decisions about the implementation:

1. Are we capable of managing it and the risks associated with it?
2. Are we ready to start it?
3. Do we need to do every task?
4. What are the right priorities to focus on and therefore should we adapt or extend the Task Outcomes?
5. How can we bring everyone on board to do this work successfully and also keep production going?

This task involves the General Manager and Unit Managers over a 2 week period to manage the audit, analyse the results, customise and schedule the implementation.

Accountability

The GM is accountable for the completion of this task

Prerequisites

You must have completed Task SETUP01

Purpose	Outcomes
To implement a management operating system that is exactly right for your business circumstances	• Management capability to manage the MOS implementation • A baseline measure of the current status and effectiveness of your MOS • A shared understanding of priorities, resource and time requirements • A schedule of implementation activities that integrates with other organisation activities • Implementation tracking measures

Purpose	Outcomes
	• Stakeholder analysis • Communications plan • Risk mitigation plan • All employees feel that they are included and will have a role in this process

Task Steps

Set up for success

Actions	Explanatory Detail	Further Guidance/Actions	Who	When	✓
1. GM selects the people who should participate in this task and introduces them to their role in all following steps.	Participants should be management stakeholders in your MOS.				
2. Any participant who has not yet done so is to complete two assessments (approx. 1 hour).	• An assessment of the extent to which your organisation currently has, supports and complies with a Management Operating System (Tool *SU MOS Assessment*). • The status and impact of behaviours and control on your business (Tool *SU High Trust Workplace*).				
3. Participants review the outputs from Task SETUP01.	Outputs include: • Completed assessments, as in the step above • The project charter • A list of actions to ensure readiness for, and success of, the project • A high-level plan for the MOS implementation				
4. GM prepares participants for this task.	Discuss the reasons each participant gives for their MOS and High Trust assessment results				

Actions	Explanatory Detail	Further Guidance/Actions	Who	When	✓
	Discuss the feedback, issues and concerns each participant may have relating to the outputs from Task SETUP01 and their role in the project				
	Discuss the Purpose and Outcomes of this task and coach as required to ensure full understanding of the need for this task. You may wish to adapt or expand the Outcomes to suit the style or focus required in your workplace.				
5. Develop your own brief statement of the practical need for this task—for use by all task participants as a consistent explanation for 'why we are doing this task'.	_____ _____ _____ _____				
6. Plan and schedule the steps of this task.	Aim to complete this task within two weeks.				
7. Get ready to start the supporting *Questions & Actions* routines.	Build the *Questions & Actions Checklist* below into appropriate stakeholders' routines and start following them.				
8. Develop and display two visual measure charts for this task.	• One chart for visual tracking of your progress through the task; e.g. print out this task, put it on a notice board and colour each step green as it is completed. • One chart to show achievement of the goal/outcomes. • Update these charts every day.				
9. Each participant develops their own 'elevator speech' as a brief summary of the message to get across to other stakeholders in a short time.	Participants should communicate often and deliberately include their peers and teams in this task. (*Tool SU Communication Plan* has a template elevator speech.)				
10. The CEO estimates the level of understanding by participants of the need for this task.	The CEO and GM coach if necessary to ensure understanding is greater than 80% before continuing with this task.				

Execute the Task

Actions	Explanatory Detail	Further Guidance/Actions	Who	When	✓
11. Conduct a diagnostic audit of the current status of all aspects of your management operating system.	Follow the instructions in Tool *SU MOS Status Audit*. This audit result provides: • A basis for decision-making in subsequent steps • A baseline measure against which you will compare later MOS audits. Make your assessment relative to each standard in column E and add comments to the *Key Gaps* (column I) in the audit. Note: Do not complete the *Actions* (column J) or *Priority* (column K) – this will be done in future tasks.				
12. Decide what must be prioritised and featured throughout the MOS implementation.	These decisions should be based on analysis of information from the diagnostic audit in the previous step. The audit will highlight priority issues in: • The standard of your MOS • How effectively the MOS is applied. Add these decisions to the Project Charter developed in Task SETUP01.				
13. Review the *Context*, *Purpose* and *Outcomes* of the **Strategy Deployment** tasks to determine if any of these tasks are not needed (or not high priority) in your organisation's current circumstances.	Consider that: • Tasks SD01, SD02 and SD03 are often substantially complete and only minor actions may be needed • Tasks SD04 and SD05 are important for full understanding and ownership of strategy at the work management level. You should confirm achievement of all task outcomes • Task SD06 is the initial opportunity to get workforce involvement in strategy deployment. It is critical to success and its outcomes must be achieved by following the right process detailed in the task's steps • Task SD07 is the execution of your strategy, task by task. You may have other ways to implement it				

Actions	Explanatory Detail	Further Guidance/Actions	Who	When	✓
	• Tasks SD08 and SD09 are important but not urgent. They can be left for at least 3 months. If you have any doubt about whether you need to do all or part of a specific **Strategy Deployment** task, read it in full before deciding. (You should expect to include all the other *The Right System* tasks as noted in the step below.)				
14. Draft your own MOS implementation schedule.	Use Tool *SU MOS Implementation Schedule* as a template and refer to the Tool *TRS Concepts* as necessary for context information • Review each *The Right System* task specification • Customise these (particularly the Task Outcomes) if necessary to ensure they have the correct focus on business priority needs you identified in the diagnostic audit above • Review the project charter and high-level plan developed in Task SETUP01 and add any necessary actions • Add any other actions you have now identified as necessary • Plan and resource each action in the schedule. This is a critical step in this task. It will take time to do it properly, but participants will be then extremely well informed about the MOS implementation process and able to complete all following steps effectively.				
15. Conduct a diagnostic audit of the stakeholders in your MOS.	Use Tool *SU Stakeholder Analysis* and develop actions as necessary to ensure support.				
16. Develop a communication plan to let everyone know about the implementation.	Use Tool *SU Communication Plan* to help develop your plan. Communication is required before the end of this task, as well as with every subsequent implementation task.				

Actions	Explanatory Detail	Further Guidance/Actions	Who	When	✓
	The purpose of the communication now is to ensure that everyone in the organisation feels that they are included in the implementation process right from the start. Therefore, as part of your overall communication plan, you should develop a brief information package that can be adapted to suit each level of the organisation that will let everyone know when and how they will be included.				
17. Identify the risks to successful strategy deployment and develop actions to manage them.	Use Tool *SU Risk Assessment Template*. Make sure you include stakeholder groups both within and outside the change group.				
18. Set up an agenda and schedule for weekly manager/subordinate review meetings to take place to monitor each person's role in the implementation.	At these meetings, each manager/subordinate pair reviews results and actions in a 5 to 10-minute, one-to-one session. The agenda should include highlights, lowlights, actions required, and activities upcoming. Pairs should cover GM/UM, UM/FLM, FLM/Supervisor.				
19. Combine all actions identified throughout this task into your complete implementation plan.	Confirm that each action in the schedule is properly planned and resourced. Ensure these actions integrate with production and other activities occurring in the organisation.				
20. Review and confirm that you have built high-trust behaviours into every action.	Use Tool *SU High Trust Workplace* as a checklist and, for each checklist item, ask yourselves the question, 'What can we build into this action that will support this high-trust behaviour?'				
21. Develop a set of measures to monitor the MOS implementation.	Include at least measures of: • Actual to Schedule progress • Anecdotal change • Observable behaviour change • Outcomes				
22. Complete the Tools *SU Change*	Compare and confirm that the scores have improved from				

Actions	Explanatory Detail	Further Guidance/Actions	Who	When	✓
Readiness and *SU DICE Assessment* again.	Task SETUP01. Identify any actions required to improve the scores and add these to your implementation schedule.				
23. Let everyone in the organisation know what is happening.	Use the information package developed with your communication plan above to ensure everyone feels included. Do not make big, formal announcements or have executives addressing large group meetings; this communication must be done by every direct manager from top to bottom as part of the day's business – e.g. at a normal weekly or start-of-shift meeting. Each manager must connect with their direct reports and let them know what is going on, and what their part in it will be. This must continue until every supervisor has done the same with their work team. You may need to have the Stratum II managers (i.e. First Line Managers or FLMs) coach their supervisors before the supervisors inform their work teams at a start-of-shift meeting. You may also need the FLM to attend these start-of-shift meetings to provide back-up support for the supervisors.				
24. Add an implementation progress report as an agenda item to weekly team meetings.	This is most critical at the Stratum III Unit Manager level.				
25. Collect and track measures for this task.	• The *Outcomes* above are delivered to standard • The *Task Steps* (or equivalent) are all completed • All items in the *Questions and Actions Checklist* below are completed to schedule and standard				
26. Complete the *Questions and Actions Checklist* below.	Note that these start during this task.				

Actions	Explanatory Detail	Further Guidance/Actions	Who	When	✓
27. Audit completion of this task and take action as required for 100% completion.	Confirm task completion with the Steering Committee.				

Related Tasks	Time	Resources
Earlier: SETUP01	Duration: 4 weeks	Tool SU MOS Assessment
During: NA	GM and UM: 8 hours	Tool SU MOS Status Audit
Later: Task SETUP03	Support staff: 24 hours	Tool SU High Trust Workplace
		Tool SU Stakeholder Analysis
		Tool SU Change Readiness
		Tool SU Communication Plan
		Tool SU DICE Assessment
		Tool SU MOS Implementation Schedule
		Tool SU Risk Assessment Template

Questions and Actions Checklist

Task SETUP02 Questions and Actions Checklist			
Who	**What**	**When**	✓
GM	For the first week after the task, follow up individually with each UM per day, asking about any issues or concerns with respect to implementing to schedule. Provide coaching as necessary and build any systemic actions into the Steering Committee role.	Daily	
Steering Committee	Each week, read, and then discuss at your meeting, at least two upcoming tasks to ensure shared understanding and clarity.	Weekly	

Who	What	When	✓
GM	At your weekly progress report, ask your team to report on the action plan and schedule developed at the workshop.	Weekly	
Participants	During this task, keep your peers and teams up to date on the task progress, ask for their input and ideas and set expectations for their ongoing greater involvement.	Daily	