



BusinessOptix T-Maps **Guidebook**

How to Implement

Guide to using T-Maps

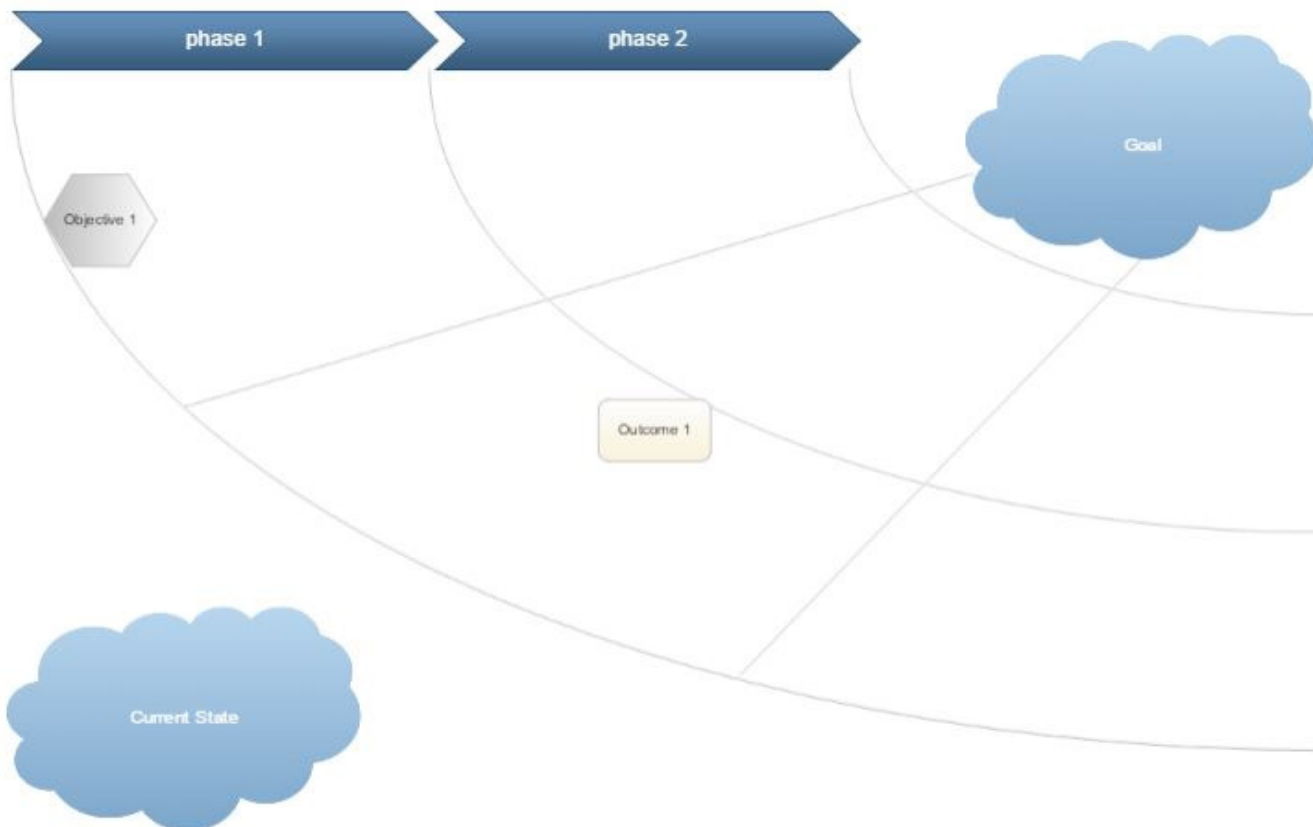
Introduction

You've recognized that your organization needs to implement a change or transformation program – such as as upping your performance from good to great, eliminating waste, maximizing an opportunity or mitigating a potential disruption. Now you need a robust way to plan your strategies before moving onto execution. Transformation Maps (or T-maps) provide a great way to define and then deliver change and transformation. Read on to find out how you can use T-maps to transform your business.

What it a Transformation Map?

A Transformation Map is a visual representation of the goal and strategic planning process. T-Maps include all of the important elements of successful strategic change: actions, milestones, timelines, results and impact. Think of a T-Map as a tool to present your way from strategy to execution, while at the same time ensuring organizational and leadership orientation. T-Maps turn the usual fear of change and reorganization into motivation to achieve clear and defined goals, with outcomes that also guide future decision making. And, as an added bonus, they're easy to create: literally get the template and get going.

An example T-Map template is provided below:



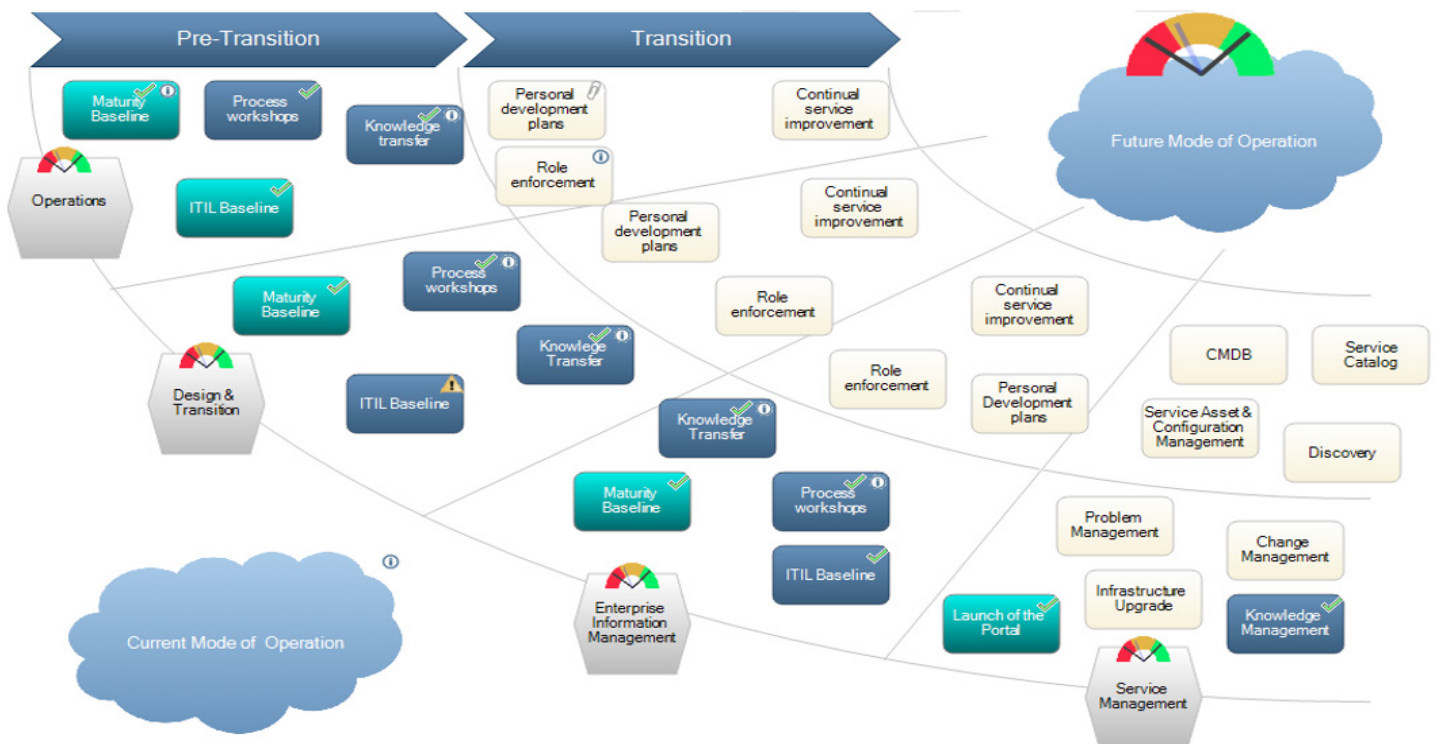
When should you use T-Maps?

T-Maps are useful when you want to agree on, communicate and track the multiple (and often complicated!) components of your strategic planning process with stakeholders. Whether looking at a program that will run for 6 months or a few years, T-Maps will help you set your strategy.

Initiatives where T-Maps can help include organization strategy, business unit or directorate strategy, major projects or initiatives e.g., change, transformation, restructuring/reorganisation, acquisition or merger, etc., etc.

Components of a T-Map

A completed T-Map will include a statement of the current and future state; timelines or phases or work; work-streams; activities and milestones – see example below.



Organization Current State

This is a short statement about where you are today and is typically represented in the bottom left-hand corner of the T-Map. It may read as “Digital is a secondary part of our business. Today we think branch first, digital second”.

Organization Future State (or Transformation Goal)

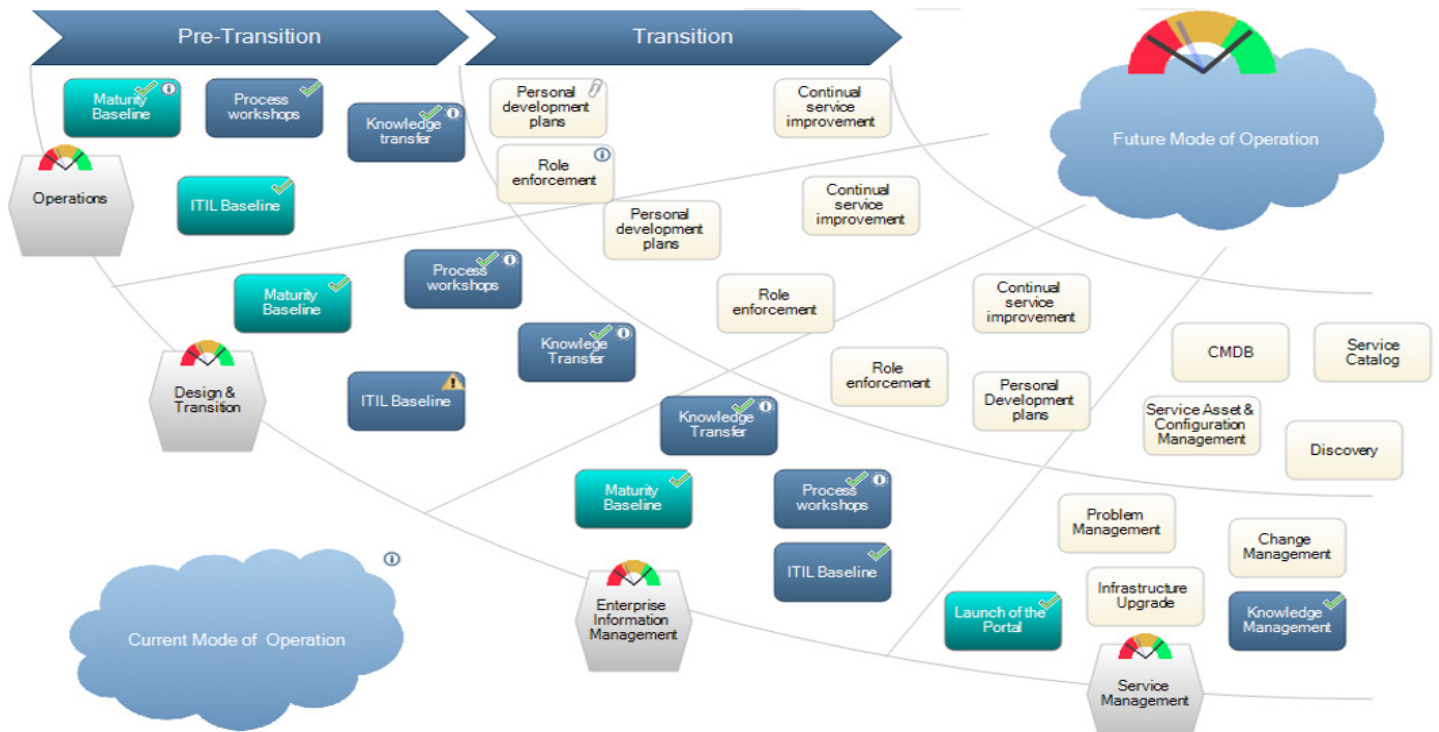
This is a short statement about where you want to be ideally, quantifiable in terms of value/volume and time, and is typically represented in the upper right-hand corner of the T-Map. It may read as “60% of all or customer interactions come through digital channels with the remaining 40% through branches and telephony.”

Timelines or Phases

These are the quantifiable phases or blocks in which you want to complete the work. For example, a two phase plan could be split into two blocks of 6 months if 12 months in total or two 3 month blocks if 6 months in total.

Workstreams

Logically, similar types of work should be grouped together in verticals, e.g. Operations or Design & Transition.



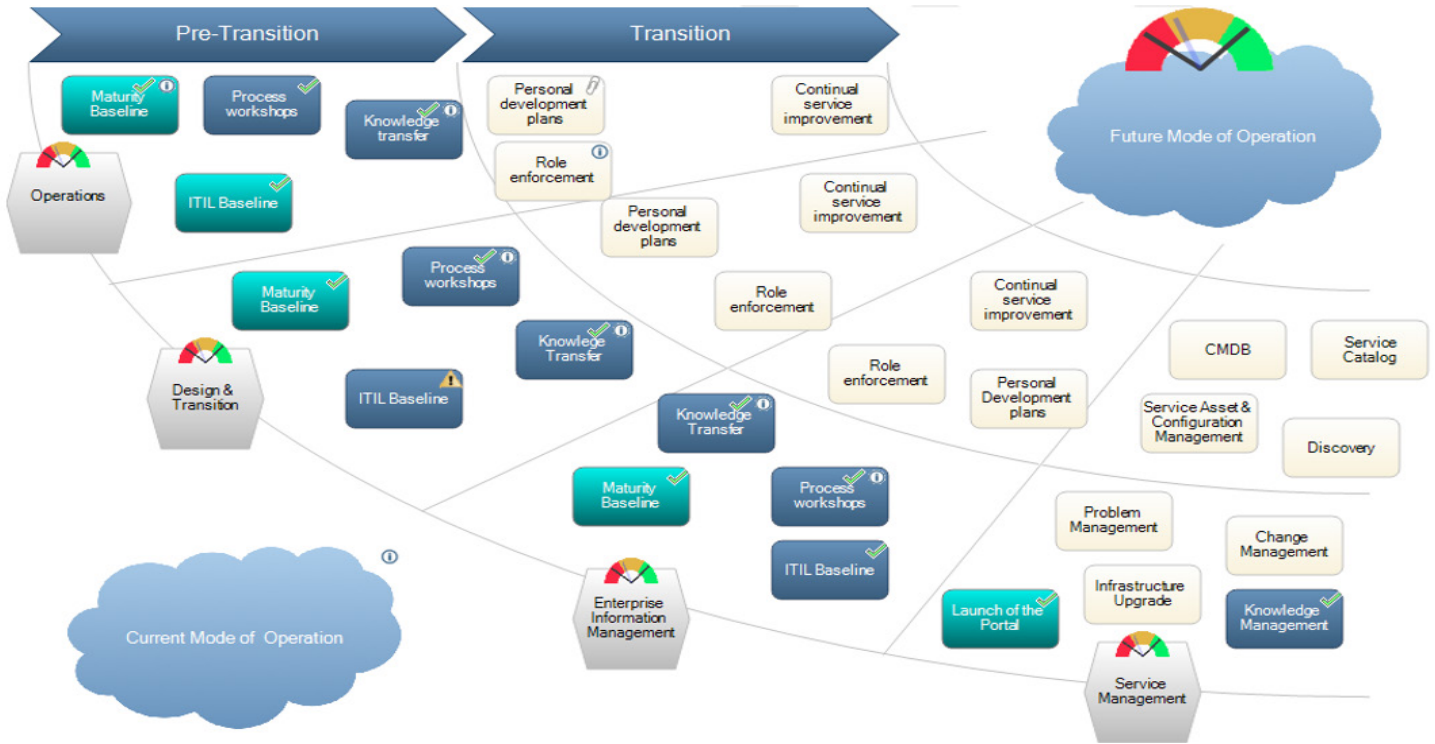
Business Outcomes

Business outcomes are key target points of achievement and/or decisions within each workstream or across the T-Map. These should be clear and precise, and once achieved, should mean that the transformation process can continue unhindered.

Sitting below each business outcome will be more detailed plans and sub-tasks. For example, within the 'Operations' workstream, you may have sub-tasks to create personal development plans, among other tasks.

Tracking Progress

Use indicators on your T-Map (see below) and or Transformation Dashboards to track the progress of your initiative at a global and workstream level. You obtain additional detail when you drill into each business outcome. Tracking should cover budgets and performance against timelines.

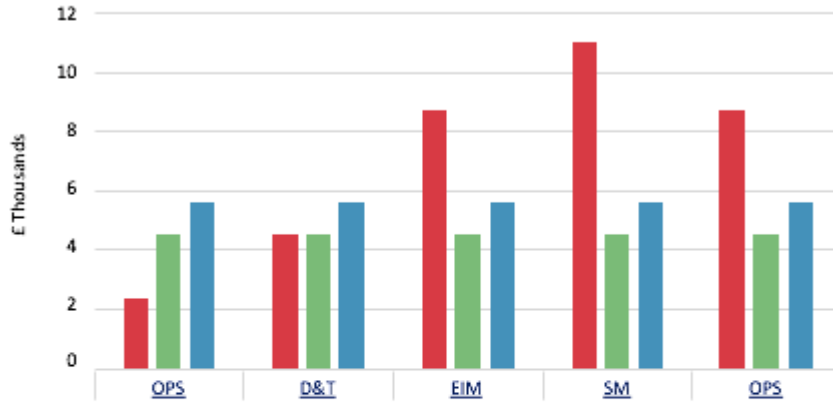


Transformation Dashboards provide a more detailed (drilldown) view of progress against specific priorities, activities and key metrics to ensure desired outcomes are achieved. At each level it can show:

- Status against plan, including percentage complete, with both time and cost overruns, and the impact of cost overruns
- Costs, Benefits and Net Present Value
- Cost vs budget analysis

Example types of more detailed insights you should be able to see are shown in the 3 sample graphs below.

TRANSFORMATION COST, BENEFIT & NPV

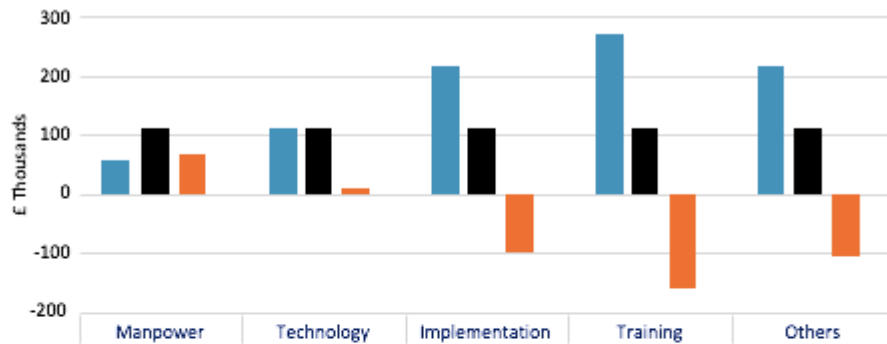


Tap on a strategic objective to drill down to its initiatives

		£ Cost	£ Benefit	£ NPV
OPS	Operations	21,000	43,000	56,000
D&T	Design & Transition	42,000	42,000	48,000
EIM	Enterprise Information Management	85,000	43,000	58,000
SM	Service Management	110,000	42,000	58,000
OPS	Operations	88,000	42,000	58,000

Cost, Benefits and Net Present Value pie charts (with drill-down from each segment)

OPS: OPERATIONS



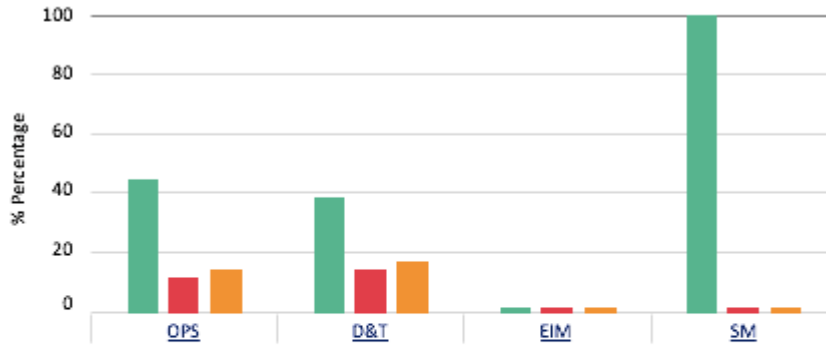
	£ Budget	£ Actual	£ Variance
Manpower	60,000	110,000	50,000
Technology	110,000	110,000	0
Implementation	210,000	110,000	-10,000
Training	270,000	110,000	-160,000
Others	210,000	110,000	-100,000

Tap on an initiative to drill down to its costs breakdown

OPS1	Maturity Baseline
OPS2	ITIL Baseline
OPS3	Process workshops
OPS4	Knowledge transfer
OPS5	Personal development plans
OPS6	Role enforcement
OPS7	Continual service improvement
OPS1	Maturity Baseline

Cost vs Budget Analysis chart

TRANSFORMATION STATUS



Tap on a strategic objective to drill down to its individual outcomes

		% Complete	% Overdue	% Cost Overrun
QPS	Operations	42	11	14
D&T	Design & Transition	38	13	17
EIM	Enterprise Information Management	0	0	0
SM	Service Management	100	0	0

Initiative Status (with drill-down from each outcome)

All these and other metrics - such as the number of non-value added processes removed, process improvement times, number of customers that have channel switched, customer satisfaction figures, reductions in the cost of doing business or increased revenues and or margins - can be traced directly back to the business outcomes and objectives defined in the T-Map.

How do you create a T-Map?

The construction of a T-Map should always be a group or team exercise. To achieve successful engagement and buy-in for your T-Map (and the strategy that informs it), it must be created by the team of people who are driving the change or transformation, have a stake in it and will be responsible for its implementation.

Your first step is to select the group of stakeholders that need to be at the table. This will either be a simple exercise of listing all the people you know need to be involved, or using a RACI matrix or stakeholder map (if there are many people who have a vested interest, yet too many with which to hold a productive session).

RACI Matrix

Process	Activity	Responsible	Accountable	Consulted	Informed
New Hire	Background Check	HR Admin	HR		HR Manager Business Unit Manager
New Hire	Provisioning		Systems		HR
New Hire	Provide Hardware	Systems	Systems	Business Unit Administrator	Business Unit Manager
New Hire	Provide Phone		Systems		
New Hire	Provide Desk		Systems		
New Hire	Create Account		IT		
New Hire	Provide Application Access		IT		HR
New Hire	Install at Desk		Systems		HR
New Hire	Interview	HR Manager Business Unit Manager	Hiring Manager		HR Admin
New Hire	HR Onboarding	HR Admin	HR	HR Manager	Business Unit Administrator
New Hire	Approval		Careers Direct		
HR Onboarding	Start on boarding process		HR Admin	HR Manager	
HR Onboarding	On boarding activities		HR Admin	Business Unit Manager	
HR Onboarding	End of on boarding activities		HR Admin		

Maintenance Planning - RACI Model

	Maintenance Supervisor	Maintenance Planner	Maintenance Technician	Maintenance Manager	Storeroom Manager	Purchasing Agent
Develop Job Plan Template	C	A/R	C	I	I	
Develop Job Plan for Specific Jobs	C	A	R		I	
Develop Library of Info for Planning	R	R	C	A	R	R
Keep Prints Updated and Secure	A	C	R	I	I	I
Stage Kitted Parts	C	R	C		A	R
Order Parts		R			I	A

■ RESPONSIBLE
 ■ ACCOUNTABLE
 ■ CONSULTED
 ■ INFORMED

At this stage you should also be in agreement about who the overall owner or sponsor will be-- typically this will be the most senior person involved; alternatively, this could be agreed between the senior level stakeholders.

Workshopping the T-Map

Once you have decided who needs to be involved, the next step is to set up and run a workshop where the T-Map for your initiative will be created. Here are some important points to consider:

- Canvas the attendees in advance to ensure they are up to speed with the initiative, and to gather their key thoughts and opinions.
- Pull together key themes, especially if your initial canvassing highlighted some specific areas of focus.
- Be cautious and don't overdo the above as you do not want to arrive at the session with what appears to be a ready-made T-Map. This may stunt the discussion and or leave people feeling that they are being railroaded down a particular path.
- Gauge how much the group want to participate in implementing the strategy, as opposed to being asked for approval for an already-defined plan.

Workshop Etiquette 101

Standard workshop activities and format apply here, e.g. introductions, setting the scene, defining the workshop purpose, breaking the initiative down into sections and driving discussion and agreeing actions against each. You should also create a parking lot for ideas outside the scope of or too big for the session. Don't forget to have a facilitator who is comfortable driving the discussion and ensuring that everyone has their say - and someone who can chivvy along the group when it gets into deep debate!

How do you use a T-Map (once planning is complete)?

With your T-Map agreed, you should be clear about the next practical steps and share those with the group - ideally this will not be via PowerPoints which cannot be updated, and instead via a portal that enables everyone to access the latest version.

As with all strategy-to-execution exercises, once you get going, your reality will look different to the plan. You must work with the team to update and adjust your strategy as you 'learn from doing'. This is where the business outcome checkpoints deliver value in providing opportunities to review progress and reset your direction if appropriate. That said, you should not simply wait until the checkpoints if your learnings tell you that a change needs to happen sooner.

With everyone able to access the latest version of the T-Map your initiative should be a living, breathing and actionable item that all can access and use. To support buy-in and continued engagement, you should also hold regular reviews and create a metrics-driven dashboard for tracking progress.

And finally, once you've reached your final outcome, close the T-Map.

Summary

Once you've agreed on - and visually described - all the elements of your strategic change process, your T-Map becomes a valuable asset to your business. T-Maps eliminate uncertainty in the change and transformation process and provide the boundaries for successful strategy execution. They support alignment of your leadership team and allow the transmission of key ideas and goals throughout the organization. Finally, they provide a solid anchor for progress meetings.

In review: The 6 Best Practice Rules when using T-Maps

1. Be clear about what the initiative has been set-up to achieve, but flexible in how you achieve it. Ideas will be generated from the first workshop and throughout the delivery.
2. Keep the top level view closely aligned to the execution view so you can track and adjust one against the other.
3. Set timeframes and or phases of work.
4. Be open and transparent.
5. Ensure the T-Maps is stored in a shared space that everyone in the team can access.
6. Adjust as new learnings are discovered.

Tools to Help

Ultimately, having all the right ideas about where you want to go is only the first step in successful business transformation; you also need to know the details of every step you're going to take along the way. The BusinessOptix platform was designed to help organizations implement best practice when creating and managing business maps, models and processes (including T-Maps), so if you need a tool and help implementing a transformation process in your business why not get in touch?

About BusinessOptix

At BusinessOptix, we help organizations Control Today, Navigate Tomorrow™ to achieve the next level of customer and operational excellence. Our cloud-based Business Process Transformation suite is used by hundreds of global firms to capture and redefine business operating and process models, accelerate transformations across the enterprise, improve operational efficiencies and streamline go-to-market processes.

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