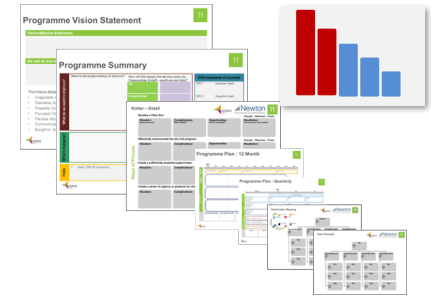


Why a Design Phase?!



So what needed to change?



Stakeholder Reviews

Tf

Questions
Generated

Interviews 1:1

Themes highlighted &
merged with deliverables

Themes reviewed with
Stakeholders

Themes agreed
with Group



"What do you want
from the programme?"
How should we work?"
Etc.....



So what needed to change?

Tf



So What Next?!



Assessing Opportunity

Tf

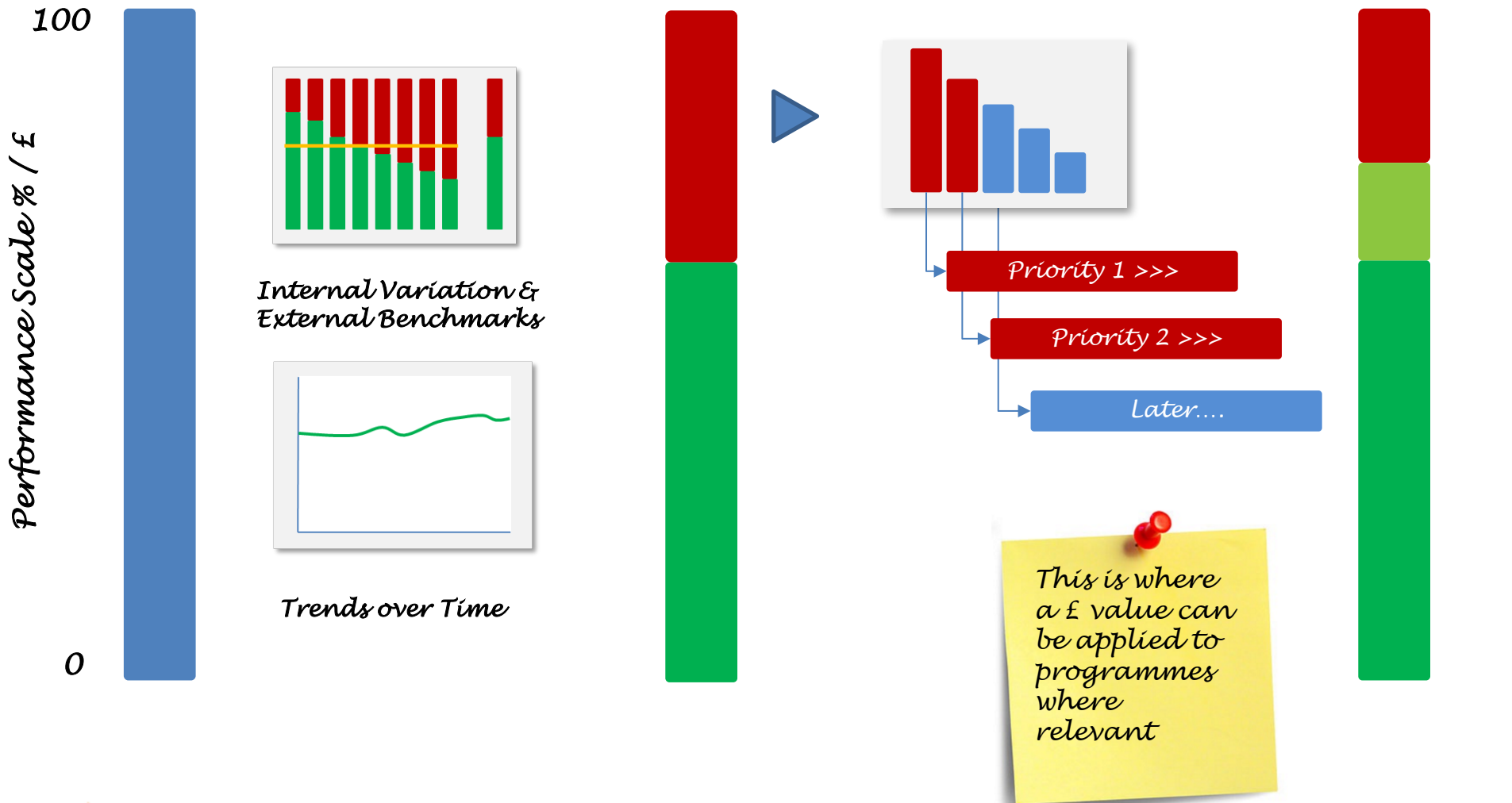
Performance (or
Cost) Scale

Variation in Performance
& Trends

Current Performance
Agreed

Sources of Variation
Identified and Prioritised

Plan to Resolve &
Impact Assessed



Expert Design Reviews



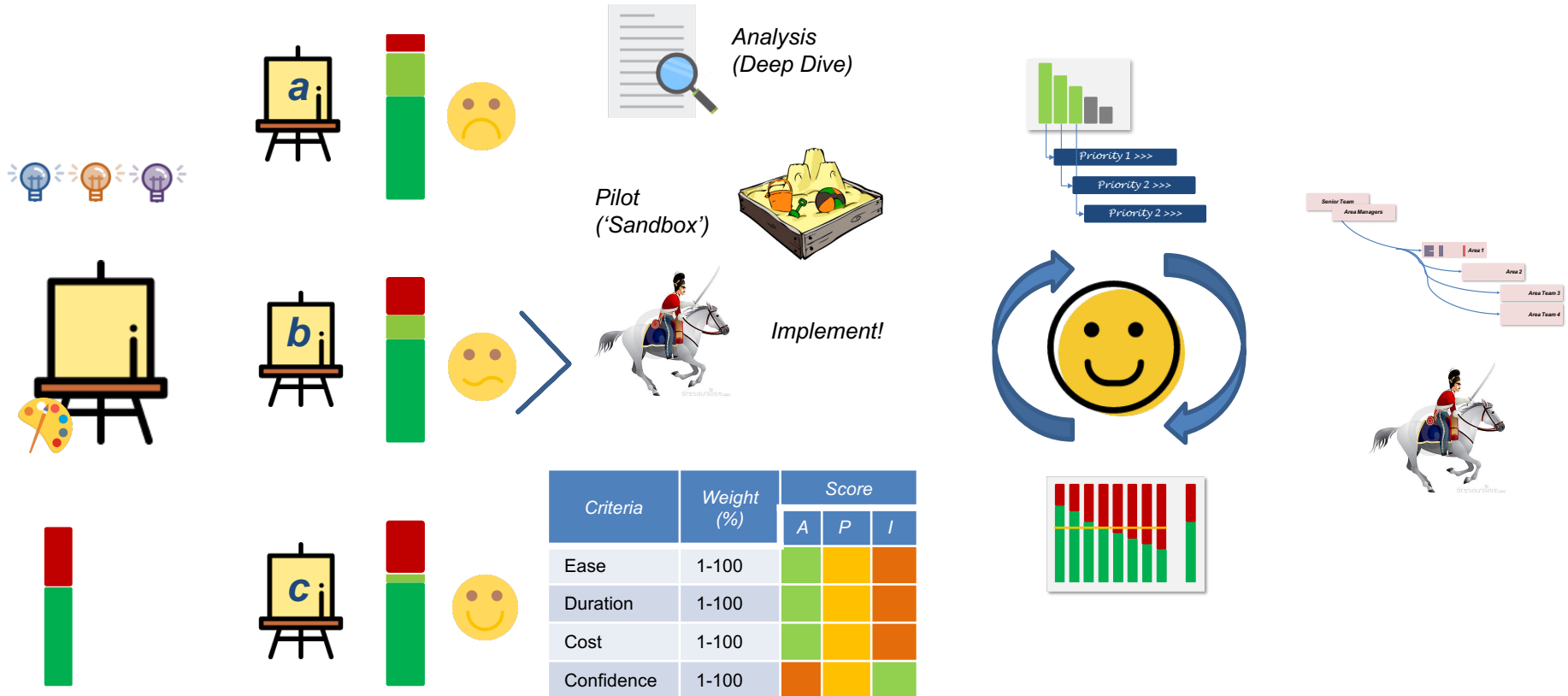
Options Generated

Impact Assessment (Cost, Staff, Quality etc)

How to Validate

Pilot Site / Team Chosen & Feedback loops setup

Amend and Review metrics



Evidence Based 'Expert Workshop'

Weighted Decision Matrix

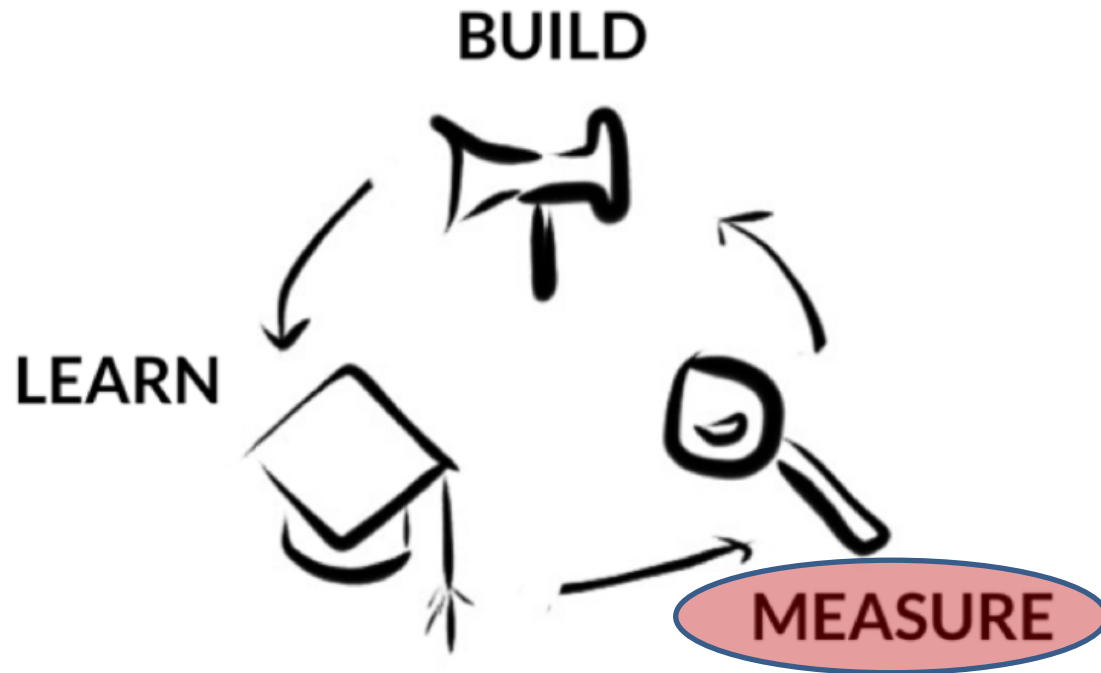
Ease vs Confidence!

Opportunity vs Engagement...

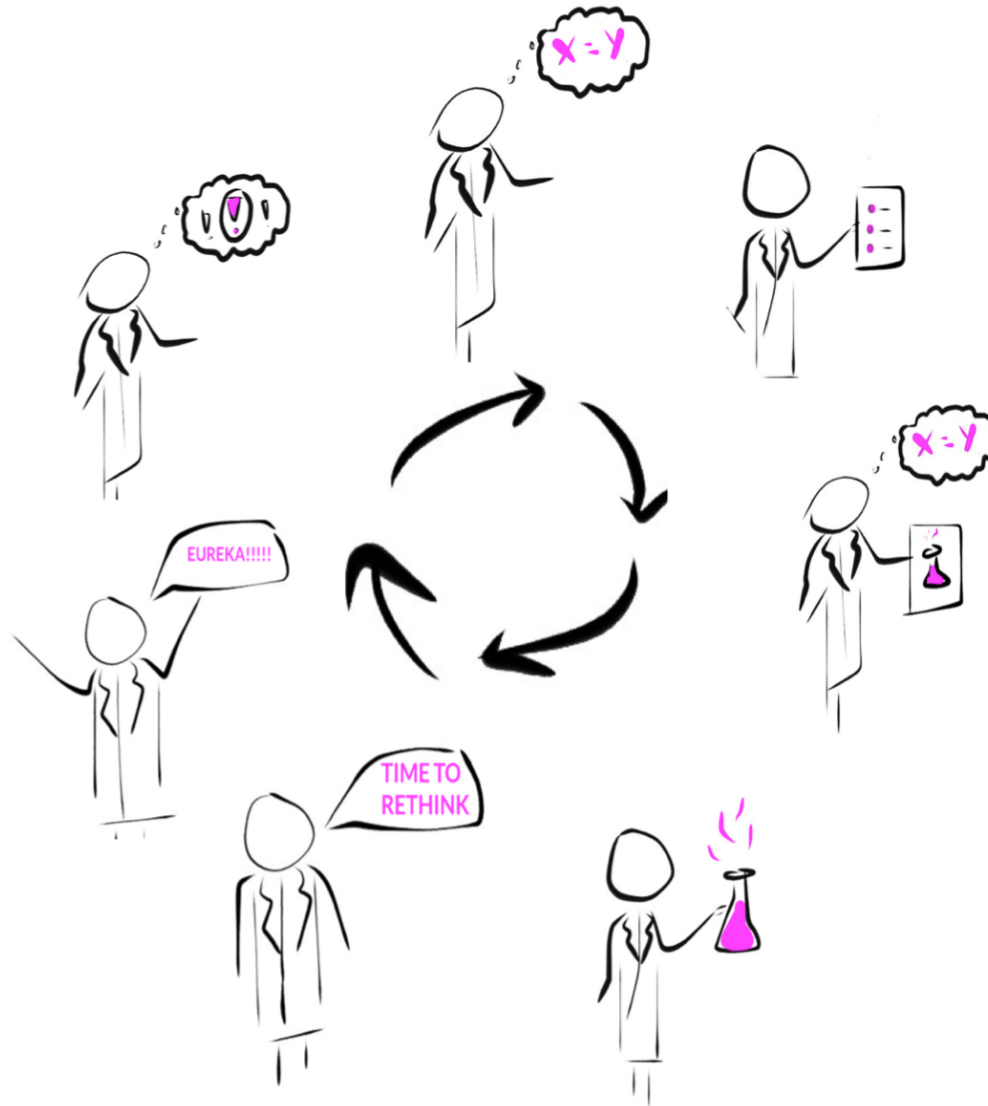
Enough but not too much!

Learning Fast....

Tf



Designing Experiments....



How?

Tf

Design Setup

Design Work

Testing Setup

Pilot Office Testing

Other Testing

*Implementation
Planning*

Governance & Structure

Supporting Documentation

What?

Tf

Design Setup

- Design Team recruitment, allocate time, training etc.
- Design Lead recruitment, allocate time, training etc.
- Agree product & scope definition
- Governance confirmation
- Begin agreeing pilot location w/ stakeholders
- Fixed, variable & environment KPIs agreed & understood
- Begin market engagement

Design Work

- Design workshops
- Define changes for testing
- Initial process design
- Rehearsal of concept
- Initial tracker building
- Initial improvement cycle design & governance definition
- Market testing
- Initial matrix production

Testing Setup

- Finalise detail for testing (pilot/ desktop/ assessments)
- Meet Pilot team, understand Team dynamic, introduce what is going to change
- For non-pilot office testing
 - Staff identification
 - Environment setup
 - Kick off events

Pilot Office Testing

Deliver

- Deliver change within pilot
- Monitoring KPIs to impact
- Run the improvement cycle

Evolve

- Proof that KPIs have moved
- Feedback and quality impact
- Modify/combine pilot as needed

Implementation Planning

- Product manual
- Risk register produced
- Staffing, roles & Structures agreed
- Systems & finance implications agreed
- Options for delivery, costs, benefits profiles
- Overlaps & dependencies mapped
- Draft roll out plan
- Service specification (or market spec) agreed

Other Testing

- Measure potential impact of change
- Identify appropriate staff & stakeholders required to carry out trials
- Set up environment/logistics
- Identify target & actual KPI
- Validate Target in trial

Governance & Structure

Supporting Documentation

Comms & Engagement

Environment for Change

Tf

People

Motivation



"I want that employee motivation study by Friday or you're sacked."

Skills



Time



Organisation

Information & Knowledge



Tools and Processes



Physical Environment



What's likely to Change?

Tf

People

Motivation

Now :

Should be...

Who Owns the Plan?

Skills

Now :

Should be...

Who Owns the Plan?

Time

Now :

Should be...

Who Owns the Plan?

Organisation

Information & Knowledge

Now :

Will be...

Who Owns the Plan?

Tools and Processes

Now :

Will be...

Who Owns the Plan?

Physical Environment

Now :

Will be...

Who Owns the Plan?

Example 1 : Comissioning



Commissioning

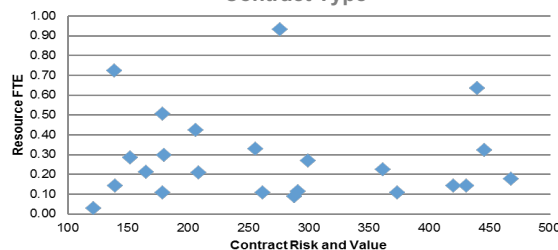
	<i>Cost</i>	=	<i>Workload</i>	x	<i>Efficiency</i>	x	<i>Pay</i>	
	<i>Staffing Cost</i>	=	<i>Number of Tasks</i>	x	<i>Effort (hours per task)</i>	x	<i>Efficiency</i>	x <i>Practitioner cost per hour</i> x <i>Management & Support On-cost</i>
Current	£5.3m	=	155	x	889	x	(18%)	x £25.63 x 49%
Future	£4.4m	=	155	x	744	x	(18%)	x £25.63 x 49%

52%
Delivery

48%
Change

"If everything is a priority, then nothing is a priority."

Correlation between the Risk and Value of a contract and Resource Allocation for one Contract Type



Correlation between Project Savings and Resource Allocation



The workload of Commissioning can be split between Change and Delivery. Commissioners however, are involved with other *Business as Usual* tasks which are not directly related to projects or contracts. Workload is not prioritised.

There is not currently a clear correlation between the contract type and the resource managing the contract. There is no consistent approach to contract management across the teams and consistent tools/systems are not being used to support

Commissioning projects are delivered through the PMO and follow a Commissioning Cycle. However, currently, approximately 90% of projects do not fully adhere to this process. Only 37% of current projects are expected to deliver a financial saving and 30% of current projects have experienced a delay.

Design Practice



By reducing the effort required down to the average per work type, an opportunity of £867k has been identified

Future

£4.4m

=

155

x

744

x

(18%)

x

£25.63

x

49%

Variable 1 –
reducing hours
per contract
type

	Ease	Cost	Duration	Stakeholder buy-in	Score	Priority
Weighting	1	1	1	2		
Desktop	2	2	1	3	11	2
Pilot	2	2	2	2	10	1
Full	3	3	3	2	13	3

A full test of variable 1 would involve adding more contracts to a team of Commissioners and facilitating their work and processes, through a Design team. This would help understand good contract management, and enable testing the variable quite clearly.

Future

£4.4m

=

155

x

744

x

(18%)

x

£25.63

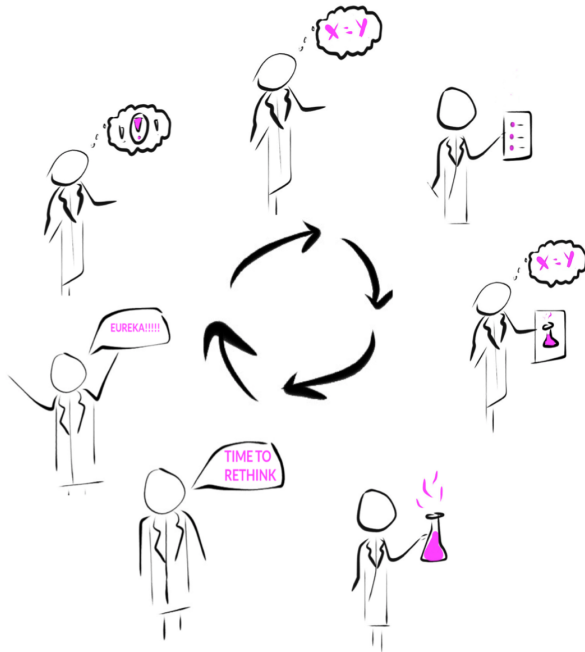
x

49%

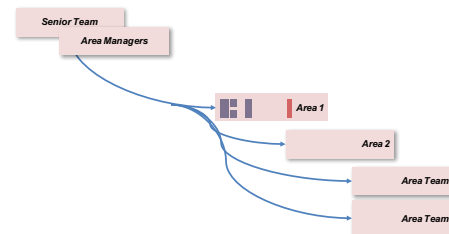
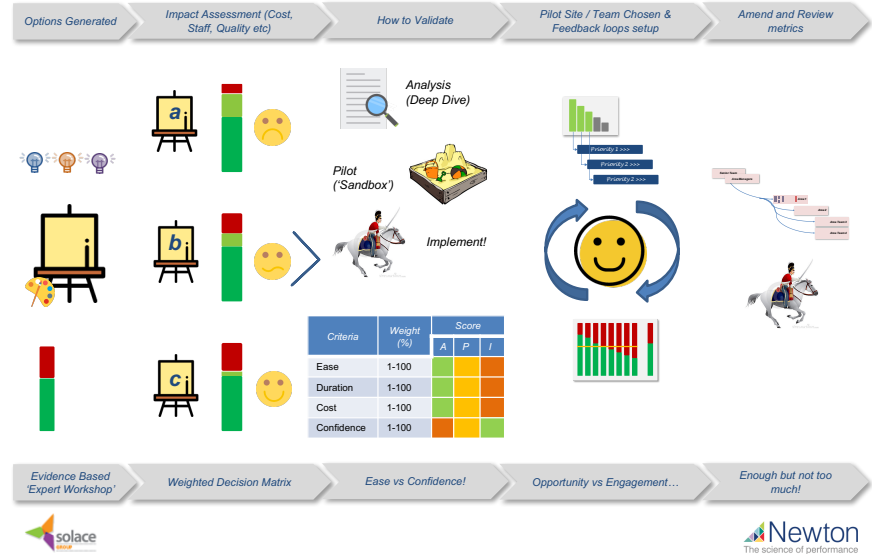
Variable 2 –
reducing
number of
tasks (project)

	Ease	Cost	Duration	Stakeholder buy-in	Score	Priority
Weighting	1	1	1	2		
Desktop	1	1	1	2	7	2
Pilot	2	2	3	2	11	1
Full	3	2	3	1	10	3

Application....



Expert Design Reviews



Design Setup

Tf

Design Setup

Design Work

Testing Setup

Pilot Office Testing

Other Testing

Implementation Planning

Design Setup

- *Design Team recruitment, allocate time, training etc.*
- *Design Lead recruitment, allocate time, training etc.*
- *Agree product & scope definition*
- *Governance confirmation*
- *Begin agreeing pilot location w/ stakeholders*
- *Fixed, variable & environment KPIs agreed & understood*
- *Begin market engagement*



Design Setup

Tf

Design Setup

Design Work

Testing Setup

Pilot Office Testing

Implementation
Planning

Other Testing

Design Setup

- *Design Team recruitment, allocate time, training etc.*
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- *Governance confirmation*
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Key Activities

- Decide on need for a client design team and level of involvement required (there are a large range of options and respective time commitment)
- Agree with senior stakeholders criteria for the roles within the design team (what skillsets, seniority, location, experience, existing stretch on team)
- Recruit people into those roles (may need encouragement through management)
- Clear time from their diaries with management
- Deliver training (typically 2 days of training content)
- Schedule design team workshops (typically 1 per week), book rooms, invite all attendees

Examples of Best Practice & Tools

- [Kent Children's Services phase 1 design team selection](#)
 - Including interview questions, selection process, flyers, emails
- [Newton "Hiring a Design Team"](#)
- [Lancs Design Team setup](#) - Training, role descriptions, application form, Key information
- [Lancs Design Team plan slides](#) & [Kent Phase 2 Design Team Files](#)
- [LG Learning Site](#) + [Client Capability site](#) – training content

Design Setup

Tf

Design Setup

Design Work

Testing Setup

Pilot Office Testing

Implementation
Planning

Other Testing

Design Setup

- *Design Team recruitment, allocate time, training etc.*
- *Design Lead recruitment, allocate time, training etc.*
- *Agree product & scope definition*
- *Governance confirmation*
- *Begin agreeing pilot location w/ stakeholders*
- *Fixed, variable & environment KPIs agreed & understood*
- *Begin market engagement*

Key Activities

- Decide whether the project will have Design Leads (typically team manager level, enthusiastic and experienced)
- Agree with senior stakeholders criteria for the Design Leads (what skillsets, seniority, experience, existing stretch on team).
- Recruit into those roles (may need encouragement through management)
- Clear time from their diaries with management
- Deliver training and start taking them on change journey

Examples of Best Practice & Tools

- [Lancs Design Lead setup](#)
 - Training, role descriptions, application form, Key information
- [Lancs Design Team plan slides](#) – includes process for Design Leads
- [LG Learning Site](#) – training content
- [Client Capability site](#) – training content

Design Setup

Tf

Design Setup

Design Work

Testing Setup

Pilot Office Testing

*Implementation
Planning*

Other Testing

Design Setup

- *Design Team recruitment, allocate time, training etc.*
- *Design Lead recruitment, allocate time, training etc.*
- **Agree product & scope definition**
- *Governance confirmation*
- *Begin agreeing pilot location w/ stakeholders*
- *Fixed, variable & environment KPIs agreed & understood*
- *Begin market engagement*

Key Activities

- Write down or draw the changes that will be made to fix the problems identified during the assessment – stating what we do and don't know yet and any assumptions made
- Tie these directly to an equation that shows what **numbers** we will be trying to affect
- List client groups, stakeholder teams, geographic areas, services and provider organisations that will or will not be included within the scope of the “product”
- Test and agree your scope and product definition with your peers, then your manager, then your senior stakeholder

Design Setup

Tf

Design Setup

Design Work

Testing Setup

Pilot Office Testing

Implementation
Planning

Other Testing

Design Setup

- *Design Team recruitment, allocate time, training etc.*
- *Design Lead recruitment, allocate time, training etc.*
- *Agree product & scope definition*
- **Governance confirmation**
- *Begin agreeing pilot location w/ stakeholders*
- *Fixed, variable & environment KPIs agreed & understood*
- *Begin market engagement*

Key Activities

- Agree programme governance
- Begin wider organisation engagement
- Define & agree milestones & stagegates
- Agree team requirements for governance meetings (boards or leadership team meetings)
- Explicitly agree who your senior stakeholder(s) are, what you'll need from them and how you'll report to them
- Explicitly agree who the rest of your stakeholders are
- Agree meeting frequency, agenda for catchups with all stakeholders (*aim to keep to as few as possible*)

Examples of Best Practice & Tools

- [Lancs Governance – Boards](#)
- [Lancs Governance - Finance](#)

Design Setup

Tf

Design Setup

Design Work

Testing Setup

Pilot Office Testing

Implementation Planning

Other Testing

Design Setup

- *Design Team recruitment, allocate time, training etc.*
- *Design Lead recruitment, allocate time, training etc.*
- *Agree product & scope definition*
- *Governance confirmation*
- ***Begin agreeing pilot location w/ stakeholders***
- *Fixed, variable & environment KPIs agreed & understood*
- *Begin market engagement*

Key Activities

- Generate a list of options for different potential pilot locations, listing pros and cons of each one
 - Pain, stretch, staffing levels, rural vs non rural, population size, office size etc.
- Take to senior stakeholder for decision
- Once agreed, start introducing the idea to service manager then team manager. Include Pilot team members in Design Team process
- Agree duration of pilot office testing – how long do we need to test for?

Design Setup

Tf

Design Setup

Design Work

Testing Setup

Pilot Office Testing

Implementation
Planning

Other Testing

Design Setup

- *Design Team recruitment, allocate time, training etc.*
- *Design Lead recruitment, allocate time, training etc.*
- *Agree product & scope definition*
- *Governance confirmation*
- *Begin agreeing pilot location w/ stakeholders*
- *Fixed, variable & environment KPIs agreed & understood*
- *Begin market engagement*

Key Activities

- Identify the headline KPI to change (people more independent, £ saved or cases through team)
- Agree the variables that make up that equation, test with peers and programme leads
- Engage with Business Intelligence to create a tracker that will give a live, day-by-day feed of the movement of each of your variables
- Make sure tracker is visible to programme team & key stakeholders so that changes can be seen during testing

Examples of Best Practice & Tools

- [Lancs Acute sandbox tracker](#)
- [Lancs Community Teams sandbox tracker](#)
- [Kent KEaH tracker \(not sandbox\)](#)

Design Setup

Tf

Design Setup

Design Work

Testing Setup

Pilot Office Testing

Implementation Planning

Other Testing

Design Setup

- *Design Team recruitment, allocate time, training etc.*
- *Design Lead recruitment, allocate time, training etc.*
- *Agree product & scope definition*
- *Governance confirmation*
- *Begin agreeing pilot location w/ stakeholders*
- *Fixed, variable & environment KPIs agreed & understood*
- *Begin market engagement*

Key Activities

- Agreeing with senior stakeholders which providers in the market will be a part of Design (preferably as few as possible)
- Agreeing a contact of appropriate seniority within provider organisations to engage with throughout design – they should be the “go-to” person to triage and/or answer questions
- Start and continue discussion with your “market stakeholder”, potentially with your senior stakeholder at first. Consider including them within your design workshops. If not, report design workshop progress to them.

Design Work

Tf

Design Setup

Design Work

Testing Setup

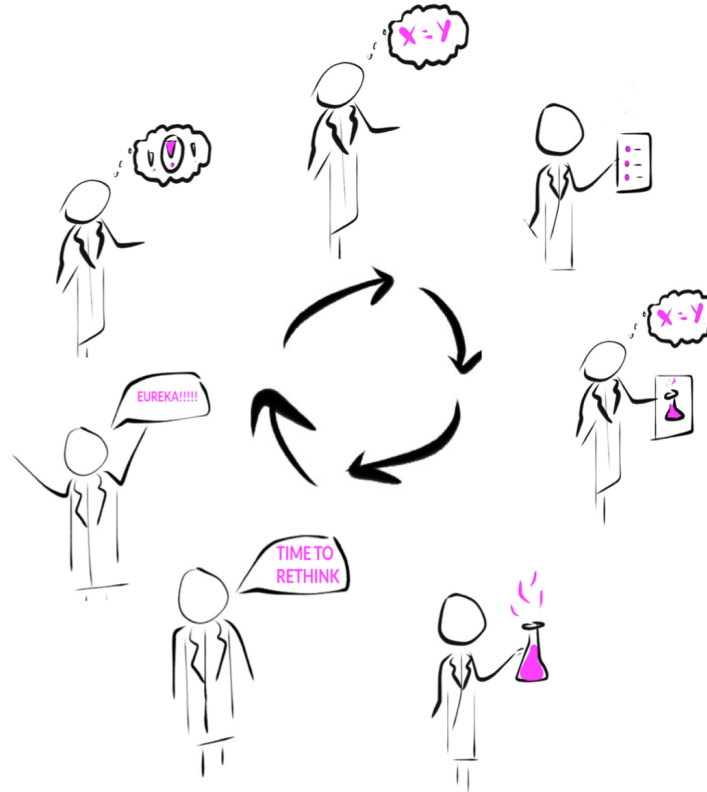
Pilot Office Testing

Implementation Planning

Other Testing

Design Work

- Design workshops
- Define changes for testing
- Initial process design
- Rehearsal of concept
- Initial tracker building
- Initial improvement cycle design & governance definition
- Market testing
- Initial matrix production



Design Work

Tf

Design Setup

Design Work

Testing Setup

Pilot Office Testing

*Implementation
Planning*

Other Testing

Design Work

- *Design workshops*
- *Define changes for testing*
- *Initial process design*
- *Rehearsal of concept*
- *Initial tracker building*
- *Initial improvement cycle design & governance definition*
- *Market testing*
- *Initial matrix production*

Key Activities

- Define the output from the workshops
 - I.e. a draft process map for new pathway; a spec for a new service; measure of how ideal service delivery is at present; etc.
- Write questions that will give that output
- Write activities that will best answer your questions (flipchart, case reviews, small group brainstorming, etc.)
- Test activities on a single attendee, attempt to extract output. If unsuccessful, re-write workshop activity or questions

Examples of Best Practice & Tools

- [Lancs “Informed Choices” \(Menu of service & Telecare workstreams\) workshops – summary here](#)
- [Kent ph2 Design Workshop](#)
- [Change management framework](#)

Design Work

Tf

Design Setup

Design Work

Testing Setup

Pilot Office Testing

*Implementation
Planning*

Other Testing

Design Work

- *Design workshops*
- **Define changes for testing**
- *Initial process design*
- *Rehearsal of concept*
- *Initial tracker building*
- *Initial improvement cycle design & governance definition*
- *Market testing*
- *Initial matrix production*

Key Activities

- Draw out the “current”: process, measure or service
- Draw out “ideal” process, measure or service
- Compare the two and list changes you need to make
 - I.e.: changes in ways of working, thinking, process, KPI, pathway
- Specify what things need to be measured or tested to achieve your ideal
 - Consolidate list into highest impact, minimum effort
- Create slides articulating what changes you will make during Design Phase, agree with Programme Leads then senior stakeholders

Examples of Best Practice & Tools

- [Change management framework](#)

Design Work

Tf

Design Setup

Design Work

Testing Setup

Pilot Office Testing

*Implementation
Planning*

Other Testing

Design Work

- *Design workshops*
- *Define changes for testing*
- ***Initial process design***
- *Rehearsal of concept*
- *Initial tracker building*
- *Initial improvement cycle design & governance definition*
- *Market testing*
- *Initial matrix production*

Key Activities

- Either with your design team or other client stakeholder groups, draw out your ideal process flow
- Put into slides, and iterate with other groups (including programme team)
- Agree with programme leads and senior stakeholders

Examples of Best Practice & Tools

- [KCC Ph2 Design LD Process Maps](#) & [LD Process Mapping Workshop](#)

Design Work



Design Work

- *Design workshops*
- *Define changes for testing*
- *Initial process design*
- ***Rehearsal of concept***
- *Initial tracker building*
- *Initial improvement cycle design & governance definition*
- *Market testing*
- *Initial matrix production*

Key Activities

- This can be seen as initial draft testing
- Having defined the changes for testing, identify appropriate way to carry out a dummy-run of those changes
- Can be done hypothetically or carried out with one practitioner in one day
- Ensure there aren't glaring or avoidable impracticalities or problems in your testing

Design Work

Tf

Design Setup

Design Work

Testing Setup

Pilot Office Testing

Other Testing

Implementation Planning

Design Work

- *Design workshops*
- *Define changes for testing*
- *Initial process design*
- *Rehearsal of concept*
- ***Initial tracker building***
- *Initial improvement cycle design & governance definition*
- *Market testing*
- *Initial matrix production*

Key Activities

- Write up and agree a specification with Design Team, programme team, & stakeholders
- Draw out a mock-up of what the tracker needs to look like – test this with the design team
- Engage with business intelligence to find approach feeding live data into the back-end of the tracker
- Build a draft of the tracker
- Test it with the Design Team
- Take feedback & iterate

Examples of Best Practice & Tools

- [Lancs Acute sandbox tracker](#)
- [Lancs Community Teams sandbox tracker](#)
- [Kent KEaH tracker \(not sandbox\)](#)
- [Tracker delivery checklist](#)

Design Work

Tf

Design Setup

Design Work

Testing Setup

Pilot Office Testing

*Implementation
Planning*

Other Testing

Design Work

- *Design workshops*
- *Define changes for testing*
- *Initial process design*
- *Rehearsal of concept*
- *Initial tracker building*
- *Initial improvement cycle design & governance definition*
- *Market testing*
- *Initial matrix production*

Key Activities

- Go and shadow a few well-functioning improvement cycle meetings on site (or off-site)
- Draft a proposal outlining frequency & attendees for the various levels of your Improvement cycle, run through with a programme expert for challenge & feedback
- Test with design team
- Run through with your senior stakeholder, and make sure appropriate time is allocated from each level of management to run these improvement cycles effectively
- Put together content (typically slides covering improvement cycle training and how they will run in your workstream) to deliver to the improvement cycle attendees at a later date

Examples of Best Practice & Tools

- [Lancs Childrens' Project Accuracy improvement cycle meeting](#)
- [Improvement cycle wiki](#)

Design Work

Tf

Design Setup

Design Work

Testing Setup

Pilot Office Testing

Implementation Planning

Other Testing

Design Work

- *Design workshops*
- *Define changes for testing*
- *Initial process design*
- *Rehearsal of concept*
- *Initial tracker building*
- *Initial improvement cycle design & governance definition*
- **Market testing**
- *Initial matrix production*

Key Activities

- Work with senior stakeholders to agree which provider organisations would be most appropriate for design phase testing
- Work to identify implications on contracting or capacity & mitigate any negative financial or operational consequence of testing
- Work with provider organisation to define approach to testing (this could be directly related to Pilot Office testing or not)

Design Work

Tf

Design Setup

Design Work

Testing Setup

Pilot Office Testing

Other Testing

*Implementation
Planning*

Design Work

- *Design workshops*
- *Define changes for testing*
- *Initial process design*
- *Rehearsal of concept*
- *Initial tracker building*
- *Initial improvement cycle design & governance definition*
- *Market testing*
- *Initial matrix production*

Key Activities

- Work with programme team to enter all equations and KPIs into an opportunity matrix
- Use tracker and business intelligence/performance to identify current (baseline) values for all fixed, variable, environmental KPIs

Testing Setup

Tf

Design Setup

Design Work

Testing Setup

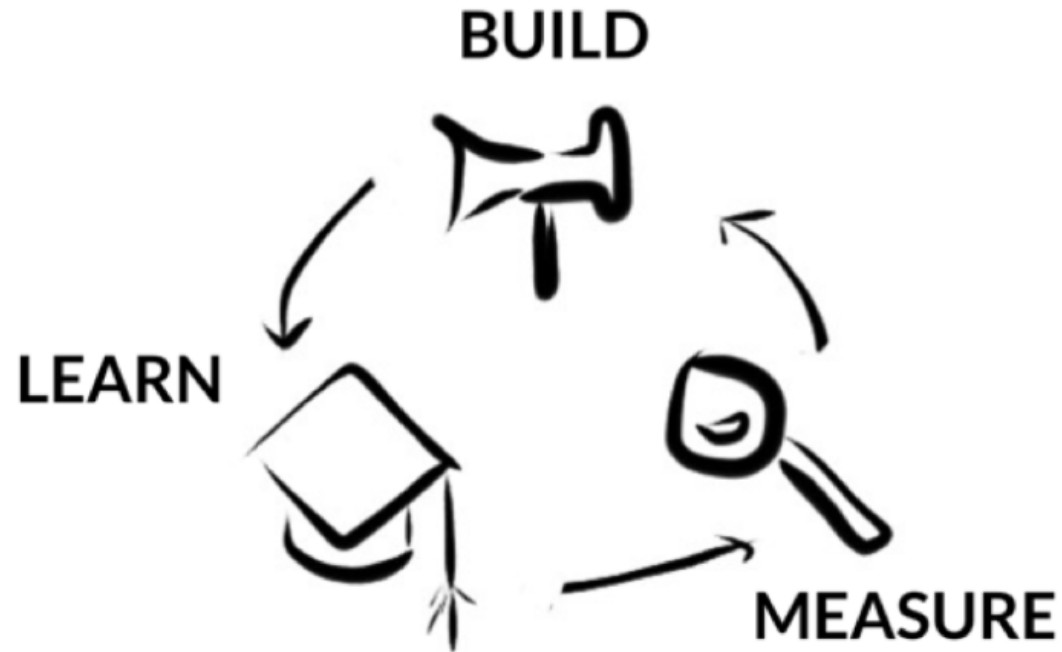
Pilot Office Testing

Other Testing

Implementation
Planning

Testing Setup

- Finalise detail for testing (pilot/ desktop/ assessments)
- Meet Pilot team, understand Team dynamic, introduce what is going to change
- For non-pilot office testing
 - Staff identification
 - Environment setup
 - Kick off events



Testing Setup



Testing Setup

- *Finalise detail for testing (pilot/ desktop/ assessments)*
- *Meet Pilot team, understand Team dynamic, introduce what is going to change*
- *For non-pilot office testing*
 - *Staff identification*
 - *Environment setup*
 - *Kick off events*

Key Activities

- Agree with programme team and senior client stakeholder the method of testing each variable/fixed KPI within workstream equations
- Confirm duration of Pilot office testing – how long does the pilot need to go on for?

Testing Setup

Tf

Design Setup

Design Work

Testing Setup

Pilot Office Testing

Implementation
Planning

Other Testing

Testing Setup

- *Finalise detail for testing (pilot/ desktop/ assessments)*
- *Meet Pilot team, understand Team dynamic, introduce what is going to change*
- *For non-pilot office testing*
 - *Staff identification*
 - *Environment setup*
 - *Kick off events*

Key Activities

- Spend a few days a week for the fortnight leading up to the start of any testing with the pilot team
 - Developing relationships, identifying potentially difficult team members, introducing and humanising the programme
 - Introduce what is going to change during testing – and why it matters
 - If necessary, do some case reviews to point out that there is significant room for improvement
 - Define roles and responsibilities within team – in particular with team manager – during testing
- For pilot testing: order resources required (whiteboards, flips, etc)

Examples of Best Practice & Tools

- [Change management framework](#)

Testing Setup

Tf

Design Setup

Design Work

Testing Setup

Pilot Office Testing

Implementation
Planning

Other Testing

Testing Setup

- Finalise detail for testing (pilot/ desktop/ assessments)
- Meet Pilot team, understand Team dynamic, introduce what is going to change
- For non-pilot office testing
 - Staff identification
 - Environment setup
 - Kick off events

Key Activities

- Dependent on type of testing (studies, desktop assessments, face-to-face assessments etc.):
 - Identify a group to carry it out
 - Free up required resource with management
 - Organise sessions (rooms, refreshments, content etc.)
 - Take group on “the change journey so far”
 - Carry out testing & feedback results

Examples of Best Practice & Tools

- [LG Learning Site](#) – training content
- [Client Capability site](#) – training content
- [Newton Sustainability Wheel](#) & [McKinsey 7S](#)

Pilot Office Testing

Tf

Design Setup

Design Work

Testing Setup

Pilot Office Testing

Implementation
Planning

Other Testing

Pilot Office Testing

Deliver

- Deliver change within pilot
- Monitoring KPIs to impact
- Run the improvement cycle

Evolve

- Proof that KPIs have moved
- Feedback and quality impact
- Modify/combine pilot as needed



"I want that employee motivation study by Friday or you're sacked."



Pilot Office Testing

Tf

Design Setup

Design Work

Testing Setup

Pilot Office Testing

Implementation
Planning

Other Testing

Pilot Office Testing

Deliver

- *Deliver change within pilot*
- *Monitoring KPIs to impact*
- *Run the improvement cycle*

Evolve

- *Proof that KPIs have moved*
- *Feedback and quality impact*
- *Modify/combine pilot as needed*

Key Activities

- Start the pilot testing with a step-change in the way of working
- Support change in working with change in environment (install whiteboards or other equipment near start of testing)
- Ensure programme & pilot team have appropriate visibility of KPI they are working to affect
- Kick off improvement cycle meetings
- Review KPIs within improvement cycle meetings, and drive (resourced, SMART) actions.

Examples of Best Practice & Tools

- [Lancs Acute sandbox tracker](#)
- [Lancs Community Teams sandbox tracker](#)
- [Improvement cycle](#)
- [Change management framework](#)

Pilot Office Testing



Pilot Office Testing

Deliver

- Deliver change within pilot
- Monitoring KPIs to impact
- Run the improvement cycle

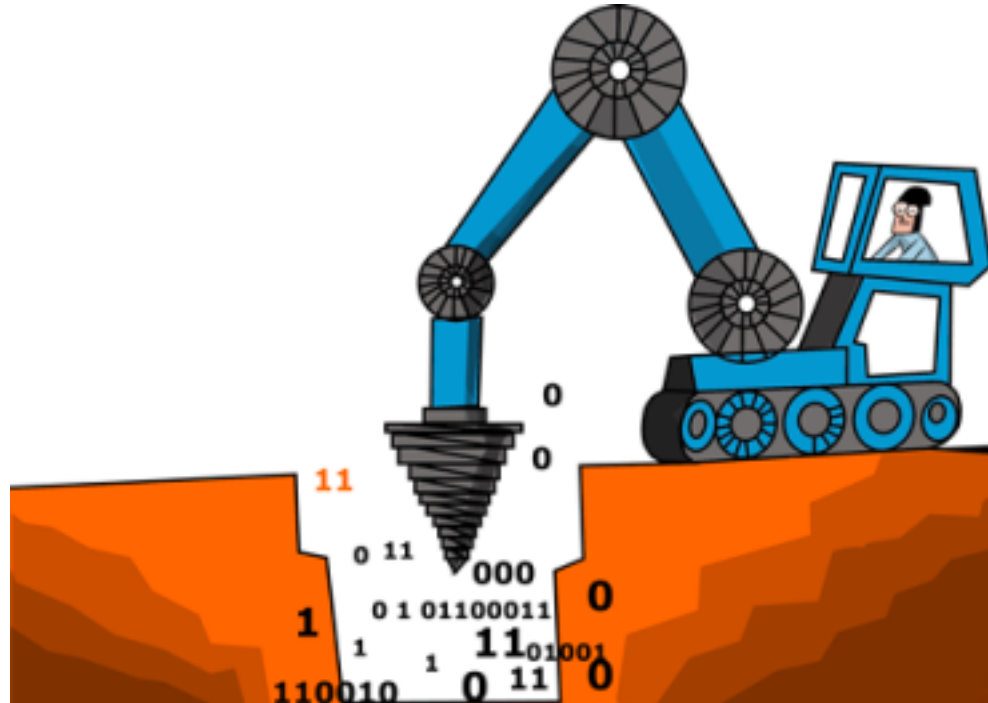
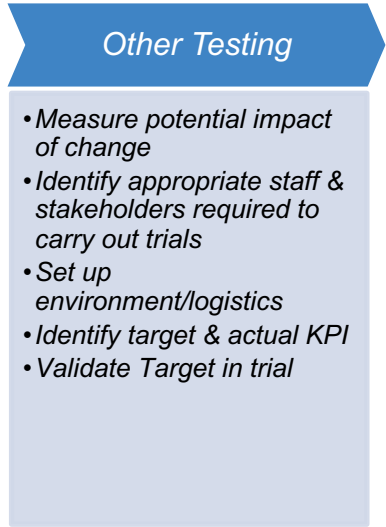
Evolve

- Proof that KPIs have moved
- Feedback and quality impact
- Modify/combine pilot as needed

Key Activities

- Identify shift in KPI
 - Capture baseline KPI (typically at least 6 weeks before Pilot)
 - Take movement in KPI after >4 weeks of Pilot testing (smaller durations than this can be unreliable) and understand why the KPI has changed
- Compare shift in KPI to ideal (this could be captured from Assessment findings or desktop assessments)
 - Identify if and how testing could be improved
- Capture and summarise customer and pilot team feedback to measure impact on the change in the way of working and service quality
- Peer review pilot tests to identify interdependencies
 - Combine pilots to test interdependencies

Tf



Other Testing

Tf

Design Setup

Design Work

Testing Setup

Pilot Office Testing

Implementation Planning

Other Testing

Other Testing

- *Measure potential impact of change*
- *Identify appropriate staff & stakeholders required to carry out trials*
- *Set up environment/logistics*
- *Identify target & actual KPI*
- *Validate Target in trial*

Key Activities

- Agree “representative sample” criteria with senior stakeholders (i.e. ensure sample populations are representative by demographic, as well as large enough in number)
- Carry out case reviews, desktop assessments, or live assessments

Other Testing



Other Testing

- *Measure potential impact of change*
- *Identify appropriate staff & stakeholders required to carry out trials*
- *Set up environment/logistics*
- *Identify target & actual KPI*
- *Validate Target in trial*

Key Activities

- Agree appropriate team to carry out tests
- Ensure resource is freed up for the team to support testing

Other Testing

Tf

Design Setup

Design Work

Testing Setup

Pilot Office Testing

*Implementation
Planning*

Other Testing

Other Testing

- *Measure potential impact of change*
- *Identify appropriate staff & stakeholders required to carry out trials*
- **Set up environment/logistics**
- *Identify target & actual KPI*
- *Validate Target in trial*

Key Activities

- Setup or build tools for team to carry out tests
 - Case review forms or agree approach to “live assessments” with stakeholders
- Book rooms for sessions

Examples of Best Practice & Tools

- [Lancs LD Assessment forms](#)

Other Testing

Tf

Design Setup

Design Work

Testing Setup

Pilot Office Testing

Implementation Planning

Other Testing

Other Testing

- *Measure potential impact of change*
- *Identify appropriate staff & stakeholders required to carry out trials*
- *Set up environment/logistics*
- **Identify target & actual KPI**
- *Validate Target in trial*

Key Activities

- Measure or calculate actual KPI
- Calculate target KPI from testing

Other Testing

Tf

Design Setup

Design Work

Testing Setup

Pilot Office Testing

Implementation Planning

Other Testing

Other Testing

- *Measure potential impact of change*
- *Identify appropriate staff & stakeholders required to carry out trials*
- *Set up environment/logistics*
- *Identify target & actual KPI*
- *Validate Target in trial*

Key Activities

- If required (confirm with stakeholders), trial the change in way-of-working on a small scale (with one employee on a handful of cases)

Implementation Planning



Design Setup

Design Work

Testing Setup

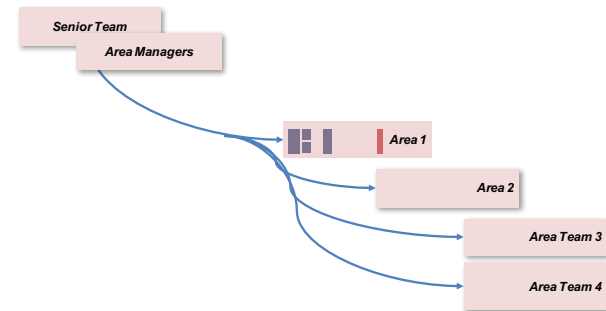
Pilot Office Testing

Other Testing

Implementation Planning

Implementation Planning

- Product manual
- Risk register produced
- Staffing, roles & Structures agreed
- Systems & finance implications agreed
- Options for delivery, costs, benefits profiles
- Overlaps & dependencies mapped
- Draft roll out plan
- Service specification (or market spec) agreed



Implementation Planning



Implementation Planning

- *Product manual*
- *Risk register produced*
- *Staffing, roles & Structures agreed*
- *Systems & finance implications agreed*
- *Options for delivery, costs, benefits profiles*
- *Overlaps & dependencies mapped*
- *Draft roll out plan*
- *Service specification (or market spec) agreed*

Key Activities

- Agree level of detail required for Product Manual with programme team and stakeholder team
- Draft with design team, design lead, pilot team
- Iterate in response to feedback
- Note: be aware of the appropriate level of detail: too much detail in design manuals can become very destructive during duration – as it can give a fixed impression of what the product will look like, which will inevitably change and iterate throughout implementation

Examples of Best Practice & Tools

- [Lancs Adults Acute Design Document](#)
- [Lancs Front Door Design Document](#)
- [Lancs LD Social Work Teams Design Document](#)
- [Newton Sustainability Wheel](#) & [McKinsey 7S](#)

Implementation Planning



Implementation Planning

- *Product manual*
- **Risk register produced**
- *Staffing, roles & Structures agreed*
- *Systems & finance implications agreed*
- *Options for delivery, costs, benefits profiles*
- *Overlaps & dependencies mapped*
- *Draft roll out plan*
- *Service specification (or market spec) agreed*

Key Activities

- Risk registers are less important than the process of considering weighing up and revisiting risks
- Structure the consideration of risks, keep track of their potential impact and act as an audit trail for the decisions made to mitigate them
- Assign client team owners to risks
- Agree format with programme/client team
- Collate and update all risks from any existing logs and notes
- Open to challenge from design/pilot team, programme team and client team
- Iterate until agreed as exhaustive

Examples of Best Practice & Tools

- [Lancs OPPD RAID Register](#)

Implementation Planning



Implementation Planning

- *Product manual*
- *Risk register produced*
- **Staffing, roles & Structures agreed**
- *Systems & finance implications agreed*
- *Options for delivery, costs, benefits profiles*
- *Overlaps & dependencies mapped*
- *Draft roll out plan*
- *Service specification (or market spec) agreed*

Key Activities

- Engage with HR & finance from early on
- Define changes in job roles
- Draft changes/additions in client training
- Present decisions for client team to make

Implementation Planning



Implementation Planning

- *Product manual*
- *Risk register produced*
- *Staffing, roles & Structures agreed*
- **Systems & finance implications agreed**
- *Options for delivery, costs, benefits profiles*
- *Overlaps & dependencies mapped*
- *Draft roll out plan*
- *Service specification (or market spec) agreed*

Key Activities

- Activity mapping through implementation to define when we'll need support from systems and finance
- Agreeing detail around assumptions and interdependencies for programme KPIs

Implementation Planning



Implementation Planning

- *Product manual*
- *Risk register produced*
- *Staffing, roles & Structures agreed*
- *Systems & finance implications agreed*
- *Options for delivery, costs, benefits profiles*
- *Overlaps & dependencies mapped*
- *Draft roll out plan*
- *Service specification (or market spec) agreed*

Key Activities

- Work with design team, client team and programme team to generate a range of options for delivery
- Provide options for delivery with pros and cons, approximate costs, benefit profiles and risks

Examples of Best Practice & Tools

- [Lancs example cash profile](#)

Implementation Planning



Implementation Planning

- *Product manual*
- *Risk register produced*
- *Staffing, roles & Structures agreed*
- *Systems & finance implications agreed*
- *Options for delivery, costs, benefits profiles*
- *Overlaps & dependencies mapped*
- *Draft roll out plan*
- *Service specification (or market spec) agreed*

Key Activities

- Work with programme team to identify interdependencies and overlaps between workstreams (potentially at an internal Review Day)
- Identify impact on any opportunity or benefit calculations, costs, market impact, commissioning activity, ways of working and structure
- Work with programme team to produce logistic and comms plan for implementation phase to avoid clashes and overlapping

Examples of Best Practice & Tools

- [Lancs OPPD Savings Forecast and Benefits profile](#)

Implementation Planning



Implementation Planning

- *Product manual*
- *Risk register produced*
- *Staffing, roles & Structures agreed*
- *Systems & finance implications agreed*
- *Options for delivery, costs, benefits profiles*
- *Overlaps & dependencies mapped*
- **Draft roll out plan**
- *Service specification (or market spec) agreed*

Key Activities

- Expectation manage & agree level of detail that will go into roll-out plan
 - Typically a 10-bar Gantt with enough thought behind it to defend it, but not a set-in-stone Implementation plan
- Work with programme team to produce logistic and comms plan to avoid clashes through overlaps

Implementation Planning



Implementation Planning

- *Product manual*
- *Risk register produced*
- *Staffing, roles & Structures agreed*
- *Systems & finance implications agreed*
- *Options for delivery, costs, benefits profiles*
- *Overlaps & dependencies mapped*
- *Draft roll out plan*
- *Service specification (or market spec) agreed*

Key Activities

Examples of Best Practice & Tools

- [Newton Sustainability Wheel](#) & [McKinsey 7S](#)

Supporting Documentation



Design Setup

Design Work

Testing Setup

Pilot Office Testing

*Implementation
Planning*

Other Testing

Governance & Structure

Supporting Documentation

Comms & Engagement

Stages in a Design Phase

Tf

Design Setup

- Design Team recruitment, allocate time, training etc.
- Design Lead recruitment, allocate time, training etc.
- Agree product & scope definition
- Governance confirmation
- Begin agreeing pilot location w/ stakeholders
- Fixed, variable & environment KPIs agreed & understood
- Begin market engagement

1

Design Work

- Design workshops
- Define changes for testing
- Initial process design
- Rehearsal of concept
- Initial tracker building
- Initial improvement cycle design & governance definition
- Market testing
- Initial matrix production

2

Testing Setup

- Finalise detail for testing (pilot/ desktop/ assessments)
- Meet Pilot team, understand Team dynamic, introduce what is going to change
- For non-pilot office testing
 - Staff identification
 - Environment setup
 - Kick off events

3

Pilot Office Testing

- Deliver**
 - Deliver change within pilot
 - Monitoring KPIs to impact
 - Run the improvement cycle
- Evolve**
 - Proof that KPIs have moved
 - Feedback and quality impact
 - Modify/combine pilot as needed

4

5

Implementation Planning

- Product manual
- Risk register produced
- Staffing, roles & Structures agreed
- Systems & finance implications agreed
- Options for delivery, costs, benefits profiles
- Overlaps & dependencies mapped
- Draft roll out plan
- Service specification (or market spec) agreed

6

Other Testing

- Measure potential impact of change
- Identify appropriate staff & stakeholders required to carry out trials
- Set up environment/logistics
- Identify target & actual KPI
- Validate Target in trial

Governance & Structure

Supporting Documentation

Comms & Engagement

Stagegate Reviews

Tf



Stagegate	Will have:	Will not have:
1	Defined initial product scope Started recording KPIs at Pilot location Trained design teams and design leads	Agreed detail of scope and product Built trackers
2	Built a tracker (not going to be the finished product) Drafted content for improvement cycles (agenda etc) Draft process flows Draft working opp. matrix + sustainability matrix	Tried to move KPIs Confirmed or fully defined future ways of working
3	Introduced pilot team to changes to existing process “Road-tested” trackers with pilot & programme team Defined approach for testing every part of your KPI Start producing supporting documentation	Changed anything yet

Supporting Documentation



Design Setup

Design Work

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Pilot Office Testing

*Implementation
Planning*

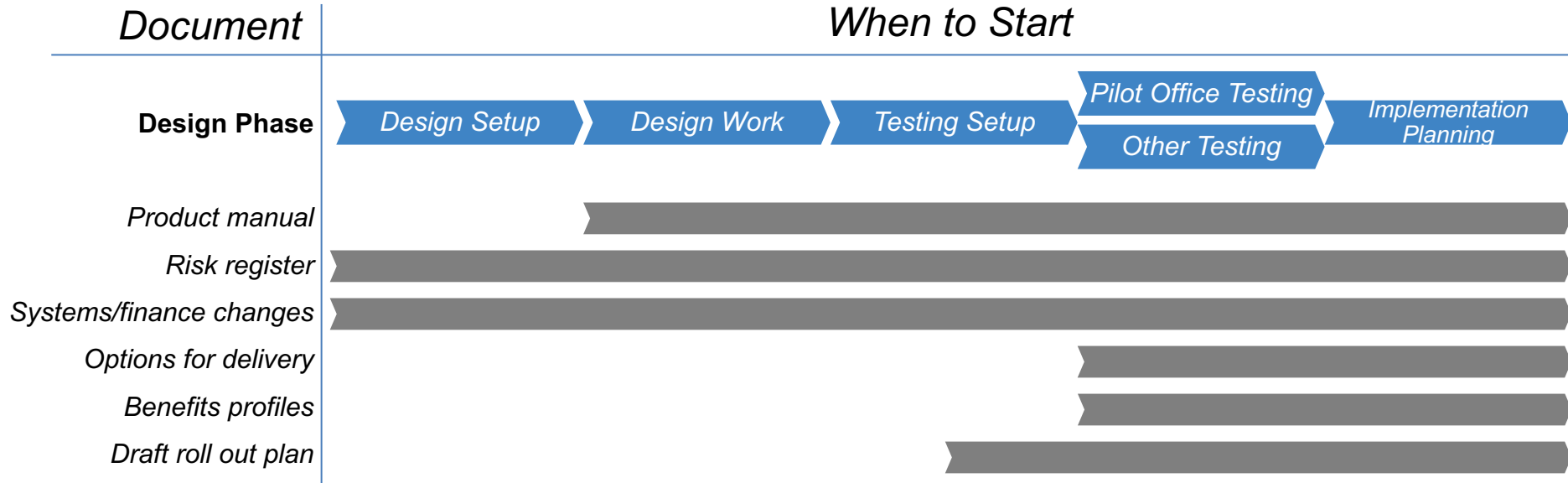
Other Testing

Governance & Structure

Supporting Documentation

Comms & Engagement

Supporting Documentation



Supporting Documentation



Design Setup

Design Work

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Planning*

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