

Self-Organisation

Health Check

By
Eugen Oetringer
eugen@comdys.com

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ComDyS Business Services B.V., Papendrecht, The Netherlands, www.comdys.com, Phone: +31-78-644 0199

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How to apply this health check

- Keep asking until there is confidence each issue/problem is well understood.
- This health check is designed for a quick check. For your initiative, you need to identify *the environment specific issues/problems*.
- For the environment specific issues/problems, consider using a technique that prevents getting lost in hundreds of issues/obstacles and endless discussions.

If employees/clients suffer from bureaucracy or complexity today

Getting lessons learned and tips ‘n tricks speeds up the transformation while reducing risks. Examples:

- How to ensure things working well remain intact.
- How to make the transformation happen with minimal interruption for clients and employees.
- How to use the existing bureaucracy to get self-organisation implemented quickly.
- How to avoid a massive training program and a massive re-writing of your documentation.
- How to get beyond the tipping point where self-organisation gets durable and fallback into old habits unlikely

The 42 issues of this health check led to ‘Guided Self-Organisation’

Guided Self-Organisation turned out to be a compilation of the best traditional and ‘new’ practices. That’s without the bureaucratic overload. Key elements are:

- As much freedom as possible
- As much guidance and direction as needed to act as one organisation, avoid re-inventing the wheel and to keep risks low
- Decision making at the optimum level

Labels Used

✓	Solved	↗	Add-on solutions, outside the scope of Guided Self-Organisation, can be built on top
(✓)	Largely solved; may be impossible to solve completely	((⚠))	Drives for solutions within or outside Guided Self-Organisation
(☑)	Partially solved		

Abbreviations

SME	Subject Matter Expert
GS	Guided Self-Organisation

Root cause 1: Too many Repositories						
Issues/ Problems	One Solution: Guided Self-Organisation™ (GS)			Is a current Issue/ Problem (Yes No)	Solution Proposal X	
	Solution Needs	Issues Left	Expected Status		Issues Left	Expected Status
Multitude of different Web places and repositories to use	One trusted central repository		✓			
Different look and feel to each repository	One look and feel		✓			
Unclear applicability of content	Repository dimension defines applicability		✓			
Unclear importance of content	Tiered structure and compliance flag for each document Other process elements provide additional trust		(✓)			
Lost trust in repositories	One repository only Traffic lights List of known issues		(✓)			

Root cause 2: Documentation Quality						
Issues/ Problems	One Solution: Guided Self-Organisation (GS)			Is a current Issue/ Problem (Yes No)	Solution Proposal X	
	Solution Needs	Issues Left	Expec- ted Status		Issues Left	Expec- ted Status
Lack of documentation standards	<p>One standard format for all Directives</p> <p>Repository structure drives for certain content in certain documents</p> <p>Through traffic lights and the Dashboard, corrective actions are triggered as issues surface</p>	No format for specific documentation, for example, regarding a solution. However, the need for this is drastically reduced.	<p>(✓)</p> <p>↗</p> <p>((△))</p>			
Unsuitable wording and document structures for compliance verification	<p>One "use" and "avoid" -type format for all Directives</p> <p>Directive verification/fast-track approval drives for proper instructions</p> <p>Through traffic lights and the Dashboard, corrective actions are triggered</p>		<p>(✓)</p> <p>((△))</p>			
Insufficient background information to understand why the strategy makes sense	<p>The Directive format drives for this kind of information</p> <p>Through traffic lights and the Dashboard, corrective actions are triggered if needed</p>	Lack of writing, culture or language skills of those having the knowledge	<p>(✓)</p> <p>((△))</p>			

Root cause 2: Documentation Quality						
Issues/ Problems	One Solution: Guided Self-Organisation (GS)			Is a current Issue/ Problem (Yes No)	Solution Proposal X	
	Solution Needs	Issues Left	Expected Status		Issues Left	Expected Status
Out of touch with user needs	Fast-track approval drives the developers to connect with those in the field from the beginning Through traffic lights and the Dashboard, the process drives for corrective actions as issues surface	Budget, skills and resources for non-trivial needs	(✓) ↗ ((△))			
Outdated material	Automatic aging triggers corrective action through traffic lights and Dashboard The aging status is shown in the repository	Budget, skills and resources for non-trivial needs	(✓) ((△))			
Insufficient information about the document's current status	Traffic lights plus instructions in the repository show reasonably current status information.	Delays in updating the status information	(✓)			
Lack of technological guidance	Directive format drives for the creation of this information Request feature through the repository and Dashboard drives for technology guidance	Budget, skills and resources for non-trivial guidance development	(☑) ↗ ((△))			
Lost trust in documentation	One repository + traffic lights + corrective instructions as appropriate within the repository		(✓)			

Root cause 3: Lack of Process between Development and Production						
Issues/ Problems	One Solution: Guided Self-Organisation (GS)			Is a current Issue/ Problem (Yes No)	Solution Proposal X	
	Solution Needs	Issues Left	Expec- ted Status		Issues Left	Expec- ted Status
Confusion resulting from the lack of integration between development and production processes and organizations	GS provides one common structure, linking development and production Disconnects are likely to show up in the Dashboard, triggering corrective actions	Management issues (budget, risk taking, politics, etc.)	(✓) ↗			
Organizational changes creating confusion between development and production	The fundamental process structures remain intact; it is a matter of getting the new organization connected to GS As confusion surfaces, it can be expected that this shows up in the Dashboard, which triggers corrective actions	Management issues (budget, risk taking, politics, etc.)	(✓) ((⚠))			
Unclear approval process	A fundamental approval structure		(✓) ↗			

Root cause 3: Lack of Process between Development and Production						
Issues/ Problems	One Solution: Guided Self-Organisation (GS)			Is a current Issue/ Problem (Yes No)	Solution Proposal X	
	Solution Needs	Issues Left	Expected Status		Issues Left	Expected Status
Bureaucracy for company-wide approval needs	Tries to achieve the right balance – as much as needed, as little as possible		(✓) ↗			
Conflicting directions or solutions from different organizations	This is likely to show up in the Dashboard, triggering corrective actions		(✓) ((⚠))			
Inadequate structures to ensure needs and feedback are to be trusted and properly prioritized	Community structures empower the feedback Traffic lights and the Dashboard trigger corrective actions		(✓) ((⚠))			
Disregard of important feedback from local to central organizations	Consistent follow-up takes place through the Dashboard		(✓) ↗			

Root cause 3: Lack of Process between Development and Production						
Issues/ Problems	One Solution: Guided Self-Organisation (GS)			Is a current Issue/ Problem (Yes No)	Solution Proposal X	
	Solution Needs	Issues Left	Expected Status		Issues Left	Expected Status
Excessive filtering of technical needs as they go through the management chain	Direct links of technicians and SMEs through the technical community Embedding of SMEs in decision-making Traffic lights and the Dashboard trigger corrective actions		(✓) ((⊖))			
Broken communication chains	Through the repository self-registration feature, everybody can register for automatic notification of updates to the repository. Excuses such as “did not know” become unacceptable.		✓			
Unrealistic non-compliance instructions, forcing everyone to ignore them	Non-compliance approval is delegated to the appropriate level, filtering out only important matters for higher-level approval		(✓)			
Disregard of compliance instructions	With root causes largely solved, this issue becomes much smaller Compliance verification		(✓)			

Root cause 3: Lack of Process between Development and Production						
Issues/ Problems	One Solution: Guided Self-Organisation (GS)			Is a current Issue/ Problem (Yes No)	Solution Proposal X	
	Solution Needs	Issues Left	Expected Status		Issues Left	Expected Status
Lack of compliance verification	A matter of building it into few but crucial places Non-compliance feedback through the community structures		(✓)			
Control mechanisms timed too late in an approval process	The need for control mechanisms becomes insignificant		(✓)			

Root cause 4: Information Overload						
Issues/ Problems	One Solution: Guided Self-Organisation (GS)			Is a current Issue/ Problem (Yes No)	Solution Proposal X	
	Solution Needs	Issues Left	Expected Status		Issues Left	Expected Status
Root cause 1+ root cause 2 + too many internal Web pages to use + too many external Web pages to use + too many e-mails	One 3-tier documentation structure with common usage and handling instructions One format for all Directives Automatic aging Status flags and corrective instructions at document level Corrective action triggering from status flags Consistent usage through structures embedded in crucial places of other processes and decision- making	Tier-4 documentation (operational documents, etc.) Tier-5 information (e-mail, communication bulletins, etc.) Out-of-scope information	(☑)			
Web search functions delivering too many hits to find and act on the proper ones	Easy repository navigation through scope limitation, repository entry pages and integration of individual documents into document sets	Out-of-scope information	(☑)			

Root cause 4: Information Overload						
Issues/ Problems	One Solution: Guided Self-Organisation (GS)			Is a current Issue/ Problem (Yes No)	Solution Proposal X	
	Solution Needs	Issues Left	Expected Status		Issues Left	Expected Status
Inability to distinguish the "relevant" from the "irrelevant" information	One 3-tier documentation structure The Directive format distinguishing less important Directives from more important Directives and from other information Document status flags listing current status Involvement of the user community	Out-of-scope information	(☑)			

Observe: Guided Self-Organisation accepts that a culture-change project is extremely difficult and takes a long time, but it asks the question, "Is there a simple solution to make things happen anyhow?" The key features used are:

- Motivating colleagues to act because they like it. This usually is done through incentive techniques (for example, quick approval if the investment or project is compliant with the Directives; strong business case otherwise)
- Aligning to human nature and human interaction as much as possible (for example, one repository)
- Providing one simple set of ground rules for everybody
- Heading for *the right balance*; avoiding extremes
- Providing a safety net that triggers corrective action (traffic lights + Dashboard + incentive techniques)

Root cause 5: Cultural Differences						
Issues/ Problems	One Solution: Guided Self-Organisation			Is a current Issue/ Problem (Yes No)	Solution Proposal X	
	Solution Needs	Issues Left	Expected Status		Issues Left	Expected Status
Many different cultures	Common ground rules, incentive techniques and instructions for incentive techniques Issues in relation with technical documentation are expected to show up in the Dashboard, triggering corrective action.	Cultural differences are a fact of life	(☑) ↗ ((⚠))			

Root cause 5: Cultural Differences						
Issues/ Problems	One Solution: Guided Self-Organisation			Is a current Issue/ Problem (Yes No)	Solution Proposal X	
	Solution Needs	Issues Left	Expected Status		Issues Left	Expected Status
Time and effort required to effect culture change	Incentive techniques (make people do things because they like it)		(✓) ✎			
Expectation that one's culture will work in foreign cultures	This is likely to show up in the Dashboard, triggering corrective action.	Many years of international work experience needed	(☑) ✎			
Insufficient time to properly review/agree on Directives and solutions	A matter of sufficient and high enough incentive techniques	Other priorities, budget, etc.	(✓) ✎			
"Not invented here" syndrome	A ground rule, built into crucial places; for example, "Is the project/investment compliant with the content of the technology repository?" Solution verification Incentive techniques		(✓) ✎			

Root cause 5: Cultural Differences						
Issues/ Problems	One Solution: Guided Self-Organisation			Is a current Issue/ Problem (Yes No)	Solution Proposal X	
	Solution Needs	Issues Left	Expected Status		Issues Left	Expected Status
"Silo" solutions	Solution verification Those solutions are likely to show up in the Dashboard, triggering corrective actions	Budget, skills and resources	(☑) ((⚠))			
Lost "lessons learned"	Issues listed in the document status in the repository contain many lessons learned. They show up in the Dashboard, triggering corrective actions. The document format drives for lessons learned to be provided with the Directives.	Budget, skills and resources for non-trivial corrections	(✓) ✂ ((⚠))			

Root cause 6: Lack of Investment						
Issues/ Problems	One Solution: Guided Self-Organisation			Is a current Issue/ Problem (Yes No)	Solution Proposal X	
	Solution Needs	Issues Left	Expected Status		Issues Left	Expected Status
Central organization projects perceived to be of insufficient value	This issue is a logical consequence of the previous root causes. Through their resolution, trust is re-established and these issues become much smaller. Through the Dashboard, evidence is provided to support budget and resource assignments.	Funding Time gap until central organization can prove value and trust is re-established	(☑) ((⚠))			
Central organization cuts projects because of insufficient value	(See previous row)	Funding Time gap until central organization can prove value again	(☑) ((⚠))			
Lack of investment in IT solutions	(See previous row)	Funding Time gap until confidence in investments is regained	(☑) ((⚠))			
Insufficient budget to solve root causes	In contradiction to many projects trying to solve the same issues one by one, the Strategy Management Process provides one solution to common needs. The cost should, therefore, be a fraction of the “many projects” alternative.	Funding	((☑))			

Root cause 6: Lack of Investment						
Issues/ Problems	One Solution: Guided Self-Organisation			Is a current Issue/ Problem (Yes No)	Solution Proposal X	
	Solution Needs	Issues Left	Expected Status		Issues Left	Expected Status
Insufficient resources to address issues	GS is relatively simple, requiring few resources The Strategy Management Process is expected to free up resources	Funding Time gap until resources become available	((☑))			
Lack of investment into people and skills	Through the Dashboard and for the development side, evidence is provided in support of such investment	Funding Recruiting Education Investment needs at the production side	((☹))			