

Introduction

The public sector is subject to continual change. Increasing cost pressures, use of technology and changing expectations of service users means having to constantly look at new ways of working to drive efficiencies, be more agile and develop skill sets to work across traditional boundaries.

The traditional view of corporate service functions – such as finance, HR, IT, procurement, legal services and communications – is changing as the organisations they serve change. New approaches to delivery can take many forms, including sharing services with other organisations, merging, outsourcing or reconfiguring other parts of your service. Whichever form your transformation takes, the need for tools, processes and advice increases, as does the need to use limited resources wisely.

This toolkit is designed as a practical guide to support your transformation and to give you the guidance and tools to decide what this could look like; how it can be agreed, planned and implemented, while at the same time, delivering the expected benefits. Recognising that many organisations have been working on transformation for some time, the aim is to share lessons learned, top tips and practical tools that have been found to be beneficial. Everyone's journey is different and parts of the process can be challenging for some organisations but not for others. This toolkit can be used both as an end-to-end 'how to' guide, or as a bank of resources to dip into as required. It references best practice methodologies and tools that are helpful for both large-scale transformation and small change projects.

Although transformation can be defined as any change or conversion, it is generally accepted that it is a large-scale change that will result in a very different look, culture or way of working that is visible both to those who work within the organisation or service and to its service users, tax payers and the wider community.

The objectives of the toolkit are to:

- Give end-to-end guidance to support the planning, design, implementation and delivery of a transformation project.
- Provide practical advice and useful tools for each stage of the transformation, covering both logical plans and processes and people-related aspects – vital to ensure change really happens in practice.
- Underpin the tools and process with lessons learned and case studies from practitioners and experts, share learning and top tips.

The toolkit has four key sections, representing the main phases of a transformation programme. Each phase is subdivided into specific stages, containing useful tools, tips and checklists for the project. Also included are case studies from organisations that have made significant transformational change in their organisations. Finally, there is a checklist to support progress monitoring.

Toolkit structure

Introduction to the toolkit	
Practical tools	
A: Prepare	A.1 Analyse the drivers for transformation
	A.2 Assess how ready your service is for change
	A.3 Build a vision for success
	A.4 Explore your options for transformation
B: Design and plan	B.1 Design the change at a high level
	B.2 Gain acceptance for the transformation
	B.3 Plan the detail of the transformation
C: Implement your transformation	C.1 Launch your transformation
	C.2 Evaluate, build and adjust your transformation
D: Sustain and improve	D.1 Make your transformation sustainable
	D.2 Realise the benefits and add more value
Transformation case studies	
Checklist summary	
References	

Contents

SECTION A: PREPARE	1
A1: ANALYSE THE DRIVERS FOR TRANSFORMATION	1
A2: ASSESS HOW READY YOUR SERVICE IS FOR CHANGE.....	8
A3: BUILD A VISION FOR SUCCESS	14
A4: EXPLORE YOUR OPTIONS FOR TRANSFORMATION	25
SECTION B: DESIGN AND PLAN	43
B.1: DESIGN THE CHANGE AT A HIGH LEVEL	45
B.2: GAIN ACCEPTANCE FOR THE TRANSFORMATION	64
B.3: PLAN THE DETAIL OF THE TRANSFORMATION.....	73
SECTION C: IMPLEMENT YOUR TRANSFORMATION	95
C.1: LAUNCH YOUR TRANSFORMATION	96
C.2: EVALUATE, BUILD AND ADJUST YOUR TRANSFORMATION.....	106
SECTION D: SUSTAIN AND IMPROVE	117
D.1: MAKE YOUR TRANSFORMATION SUSTAINABLE	118
D.2: REALISE THE BENEFITS AND ADD MORE VALUE.....	128
TRANSFORMATION CASE STUDIES	137
CHECKLIST SUMMARY	147
REFERENCES	151