Innovation & Organization Alignment

5 Best Practices to turn ONA data into action:

①

Build enthusiastic **senior level engagement** from the beginning of the ONA

②

Improve the **target unit first**, then work on collaboration across units

③

Connect formal leaders with informal influencers (connectors and brokers)

④

Identify **concrete, unique** strategies specific to that team and organization

⑤

Embed an action plan into existing meetings and governance structures for sustainable results

Building Networks for Growth and Agility

Part II: Implementing Collaboration Networks

Executive Summary

In Part I of the case study, *Strategically Targeting Network Development*, we described how Health-Incite, a high-growth leader in healthcare innovation, used organizational network analysis (ONA) to identify strategic targets for building their networks and improving collaboration where it would have the greatest impact. Now, in Part II, we describe how they turned ONA data into action and are implementing a plan to purposefully build collaboration across boundaries. The main actions that they undertook include working selectively with the highest-impact business units and facilitating cross-collaboration meetings to identify specific, concrete actions to build collaboration. Key success factors include creating a strong group of ONA advocates early in the process, involving both informal influencers (connectors and brokers) and formal leaders in the hierarchy, and embedding changes in governance structures to ensure sustainability.

BACKGROUND | The Problem

HealthIncite's success, and their four-year run of double-digit growth, was built on their ability to re-spond quickly to client needs with innovative, technology-driven solutions. But a growing client base was stretching their resources thin, and products were becoming increasingly more complex, placing greater demands on the organization to rapidly share expertise and coordinate on product delivery. Recognizing that continued growth would rely on strengthened collaboration, we conducted an ONA aimed at identifying strategic targets for collaborative network development.

The ONA revealed three main priorities:

1. **Reduce collaborative overload.** The company relied heavily on the top dozen connectors—peo-ple who were historically the "go-to" sources—and needed to create awareness of alternative sources to avoid bottlenecks that could slow response time to clients. A more pervasive over-load, which affected over a third of the population, created a situation in which people wanted to collaborate with their colleagues but felt too overloaded to do so.

2. **Make expertise more easily available through the network.** Employees found it difficult to locate the experts they needed. Of the ONA respondents, 47% cited not knowing whom to reach out to as a top impediment to collaborating. This presented the company with an opportunity to increase visibility of underutilized experts at the fringe of the network.

3. **Create agility by connecting across high-impact organizational boundaries.** HealthIncite had a major opportunity to better connect the client-facing and operational sides of the business. The ONA identified under-connected units and employee "wish lists" for improved collaboration, which were then used to identify the intersections where investments in network development would provide the most value.

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IMPLEMENTATION PROCESS | Converting Data into Action

After conducting the ONA analysis, we created a process for converting data into action. Foundational to the process was our ability to call upon a strong group of ONA advocates. At every phase of this engagement, we deliberately engaged people who could support our cause. Beginning with a set of initial stakeholder interviews to set ONA priorities, and including survey design and socialization, advocates for ONA emerged and ultimately became our champions for change.

The ONA identified for us the business units with the greatest need for increased collaboration. HealthIncite's strategy was to **start with one pivotal unit (Business Unit 6) and its three key business partners.** Business Unit 6 was selected because it emerged as the unit that was suffering the most from a lack of collaboration across organizational boundaries (as seen in the Density Index Chart in Part I). The other three units indicated that greater collaboration with Business Unit 6 was critical to the success of the business.

Another important part of our strategy was to **enhance internal collaboration first and then work across units.** We began with a deep dive into Business Unit 6 to determine best practices to leverage expertise more broadly as well as areas to reduce overload. In focusing on their own unit first, the group could feel that they were on firm footing internally, with a consensus on how to drive collaboration and gain momentum with other units.

We involved both **informal influencers**, identified through the ONA, and **formal leaders** from the hierarchy. The informal influencers were the brokers (people highly connected across organizational boundaries) and central connectors (people highly connected within their units) in the network. They provided us with insight into the challenges and constraints faced day-to-day within and across units as well as shared their best practices and identified opportunities to reduce overload. Representing the formal leadership, we involved the management team, who were there as decision makers as well as sponsors for embedding collaborative practices into their teams in the long term.

We met with the groups—first separately and then together—to develop formalized action plans. The following provides a description of how the main priorities were addressed through these plans.

Reduce Collaborative Overload

Experience shows that before people can think about reaching out to others more effectively, they need to address their existing sources of overload. Thus, before conducting the first working session, we asked everyone who attended the meeting to complete the Connected Commons Collaborative Overload Assessment. We then launched the first half-day meeting with Business Unit 6's management team, top brokers, and top connectors, and, as part of the meeting, discussed how to address the findings.

FIGURE 1: Aggregate Ratings on Beliefs to Challenge

A strong belief around "The Need to help" created inefficiencies and overload

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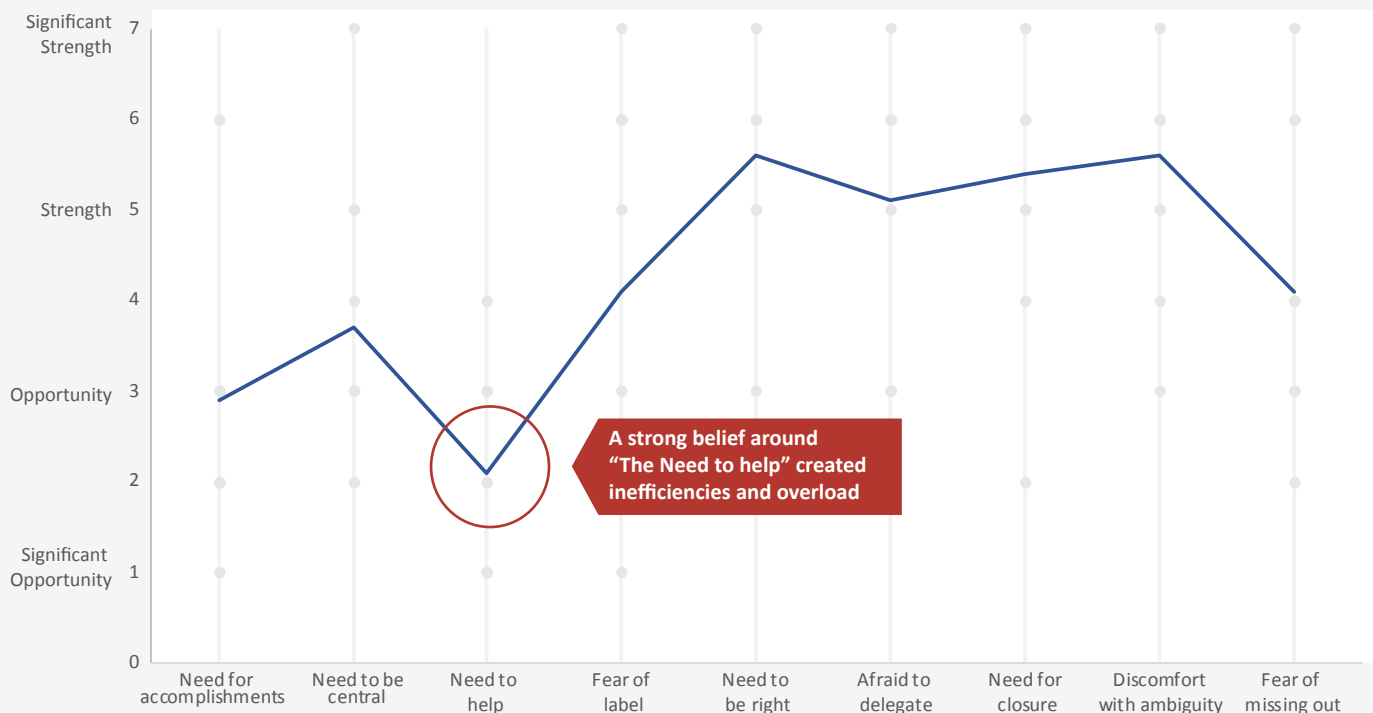
As shown in in Figure 1, the diagnostic identified a key belief around "The Need to Help" that was creating inefficient behaviors, serving neither Business Unit 6 nor their business partners well. Business Unit 6 was dedicated to showing up as a "team player" and being responsive to the needs of others, but their behavior had become one of saying "yes" to all requests, without questioning priorities or generating dialogue around them. As a result of good intentions, Business Unit 6 was becoming buried in work, obscuring a more strategic view, and ultimately burning themselves out. In thinking about how to maintain a reputation of being helpful while managing their workloads, they came up with the concept of being "Service Partners" rather than "Service Providers." This was a key shift in their mindset: Rather than "taking orders," they shifted to working hand-in-hand with business partners to prioritize and think strategically together.

Make Expertise More Available through the Network

The ONA data revealed that the three other business units requested more access to Unit 6's area of expertise. The group engaged in discussion around this and realized that they could do a better job of sharing their expertise when working within and across teams. The most successful connectors and brokers, for example, would share expertise with colleagues and then ask them to further share with their teams. The group also identified ways to make expertise available without relying on people (e.g., online resources) that would still be user-friendly for other units.

Create Agility across Organizational Boundaries

After Business Unit 6 developed strategies to build collaboration *internally*, it was time to identify collaboration best practices *across* business units. Our plan was to do this in a series of Business Unit Collaboration meetings—one with each of the units. Again referring to the ONA data, we identified the top brokers and connectors from the three other business units. We also identified one sponsor/ONA advocate from each of the other business units to provide the formal oversight and sustainability for these efforts.

Before launching the cross-unit meetings, we hosted another half-day session with Business Unit 6 to prepare the group for dialogue with their colleagues in other units. Early in the meeting, we noticed that there was some anxiety about engaging in discussions with other units. Some people described past efforts at collaborative discussions across business units and how the outcomes inevitably placed Business Unit 6 back into the "service provider" or "order taker" role. Given these experiences, the group decided to take three pre-emptive actions: engage an outside facilitator to help run the meetings, establish clear norms, and engage the unit leaders in advance.

The meeting norms (Figure 2) ensured that both units were able to make requests of the other and were willing to commit to changes in working together.

Before sending out the meeting invitations, the Business Unit 6 leader met with each of the other business unit sponsors one-on-one to share the importance and purpose of the joint collaboration meetings, gain their buy-in, and ask them to communicate those messages down to their brokers and sponsors who also would be attending.

Overall, the planning session gave participants a clear sense of the meeting agenda (Figure 3) and their roles in the process as well as ensured that the discussions would be more productive this time around. Further, during this discussion, the management team recognized that the Business Unit 6 collaboration goals fit neatly into their existing business unit strategy. This was critical to sustaining the collaboration efforts over time, as they would not be viewed as a separate initiative but, rather, as a building block to achieve their existing strategy.

We conducted the three Business Unit Collaboration meetings, and each one yielded ideas about how to collaborate on priorities across business units, how to spread expertise and knowledge more broadly, and how to increase communication, especially when faced with competing priorities.

FIGURE 2: Meeting Norms

» Engage with a curious mindset and listen with empathy

» Stay in scope (If the facilitator can't understand the conversation, we're not on track)

» Keep the conversation solution-focused and appreciative (How can we replicate and leverage what's already working?)

» Allow all voices to be heard on the call

» Both sides are to make requests and offers (It's a two-way street)

FIGURE 3: Sample Agenda for Business Partner Collaboration Meetings

» Set the context for the meeting

» Introduce team members

» Explain the goal of meeting: How do we become effective partners with universal understanding?

» Identify key areas related to to HealthIncite's Strategic Objectives

» Discuss recommendations/ ideas to effectively partner together

» Assess against key measures

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OUTCOMES

We followed up with the Business Unit 6 management team about two months after the last Business Unit Collaboration meeting to assess progress, refine strategies, and help them to remain focused on the collaboration efforts. Overall, they were able to embed many of the suggestions into their daily behavior and structures, and, importantly, the actions they identified were **concrete and specific** to their team and organizational culture. Below are samples of HealthIncite's outcomes:

Mindset shift

Shift from service providers to service partners: Instead of thinking of themselves as support *for* the business, they realized they *are* the business. As a result, they listened to requests differently and developed strategies with joint ownership for delivering outcomes.

Teach others how to fish: They shifted from having *the* answer and "giving others a fish" to "teaching others how to fish." In other words, they taught others how to think critically and to understand the desired outcome so that they could come up with their own solutions.

Structural shifts

Post Project Review: They wove collaboration discussions into existing processes. Instead of focusing solely on the technical aspects of the project (what worked and what should change), they also reflected on how they collaborated both among themselves and with other units.

Strategize Together: They met jointly with other Business Units and reviewed their strategy and priorities in partnership. They planned ahead and anticipated how the priorities might shift. They set up measures to address predictable "urgent requests" on a monthly basis and established joint metrics to measure success.

Behavior shifts

Think & Ask WHY: They encouraged staff to think about requests (rather than blindly accepting them) and ask questions to better understand the context and purpose behind the request.

Create a Ripple Effect: During small team meetings, where knowledge-sharing was typically limited to those present, they began explicitly requesting that team members go back to their teams after the meeting and transfer the knowledge to others who could benefit from the information.

As with most change initiatives, ongoing attention is needed for HealthIncite to maintain focus on collaboration both within and across the business units. Overall, actions taken on the basis of the ONA kick-started changes in mindset and behaviors, which, along with changes to work process and governance, will continue to propagate through the network.
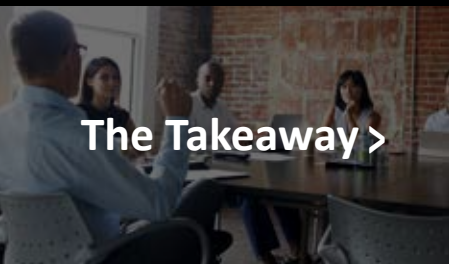
The Takeaway >

Assess:
Identify critical ONA areas to improve collaboration

Connect:
Learn from the "bright spots." Set up forums to allow the top connectors and brokers to analyze what's working and what to improve

Create:
Co-create action plans to reduce burnout and increase effectiveness within and across teams

About the Authors

Laura Mendelow, MAOD, PCC, owner of MCG, is an executive coach, leadership trainer, and facilitator since 1994. From working with a broad spectrum of leaders in Fortune 500 companies, non-profit and government agencies, she has come to the conclusion, "when you 'get' people, you get results." Leveraging the ONA and other assessment tools, she works with leaders and teams to uncover key success factors beneath the surface to develop strategies with lasting results.

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About the Connected Commons

The Connected Commons is a community of people who believe that in an interdependent world, networks are the organizing principle of our social and organizational lives. We seek to develop network ideas that advance the performance and well-being of individuals, organizations and society as a whole.