ROSTONE WORKING TOOLS

Organisational Design Plan

A planning sheet for the owner and management team to work through the ten steps of organisational design.



BUSINESS _____ DATE _____ LEAD _____

Steps 1–3 Diagnose

1 Set the strategic objectives and the case for change

What does the business need to achieve over the next two to three years? What is the reason for change?

Output: Written objectives and the reason for change

Notes · who · by when

2 Agree design principles

Which requirements must any proposed design meet? For example, "decisions on pricing are made within a day without the owner".

Output: Short list of principles, each with what and why

Notes · who · by when

3 Assess current ways of working

Where does work wait? Who do people really go to for decisions? What works well? One way: follow one job from enquiry to final invoice. Record baselines.

Output: Current picture, strengths, gap and baseline figures

Notes · who · by when

Steps 4–7 Design

4 Map the work the business needs to do

Which activities will the future business need: winning work, planning and scheduling, delivery, service and maintenance, purchasing, finance, people, compliance? Any new ones?

Output: Grouped activities with an estimate of workload

Notes · who · by when

5 Define roles and decision rights

Build roles from the work, not the people in post: purpose, main responsibilities, decisions made without referring upwards. Who is responsible and accountable (RACI), and what approval limits apply?

Output: Role outlines, RACI matrix, approval limits

Notes · who · by when

6 Develop three or four design options

How does each option group the work? How many layers? Where do shared services sit? Which systems and measures support it?

Output: Three or four options, each with chart and hand-offs

Notes · who · by when

7 Test the options and choose one

Against the principles and scenarios (a key manager leaves, the order book doubles). Can the business afford the roles? Does it have, or can it recruit, the managers? Can it be put in place while jobs are still being delivered?

Output: The chosen design, with the reasons

Notes · who · by when

Steps 8–10 Deliver

8 Plan the transition

Order of change, timings, who leads each part, and how day-to-day work continues. Changes to terms or roles need particular care.

Output: Phased plan with owners and dates

Notes · who · by when

9 Communicate and implement

What is changing, why, what it means for people, and when? Which practices change with it: job descriptions, meeting rhythms, reporting, measures and, where needed, pay?

Output: New structure, roles, decision rights and routines working

Notes · who · by when

10 Review and adjust

Against the principles and the step 3 baseline, for example at three and twelve months. Possible measures: price turnaround, jobs awaiting approval, rework or return visits, gross margin, owner escalations.

Output: Review against the measures and a list of adjustments

Notes · who · by when

A planning aid built from the article "Organisational Design: What It Is and the 10-Step Process" on rostoneopex.com. It sets out one practical framework; other sequences exist. It is not a diagnosis of any business and not legal or HR advice. Where changes affect employees' terms or could lead to redundancies, check the current Acas and GOV.UK guidance.