



## **Organizational Reviews - "It's the process that matters!"**

One thing I've learned over the years is the process you use to review organizational issues is key to achieving optimal results. While no process is perfect, there are several key factors that need to be included to help ensure success. These include:

- Support of a senior project sponsor and identification of an invested project manager – No project will be successful without the endorsement and support of a senior project sponsor. Whether this is the City/Town Manager, Department Director, etc., this person is key to helping initiate the review and is critical when it comes time to implement the recommendations. Likewise, the identification of a key and invested project manager is critical to help ensure the project stays on track and achieves the desired results.
- Involvement and input of employees (and other key stakeholders) – Over my 30-plus year career, I can think of many organizational review processes that failed and only a handful that were successful. Of the successful ones, they all had a common denominator. The employees of the Organization, Department, or Work Unit were fully involved and engaged in the process. In most cases, they participated by sharing both their perspective of the issues and generating ideas to help resolve the issues. In addition, other key stakeholders were also asked for their input to help inform the process and the issues.
- Complete and honest identification of the issues to address – The systematic and complete identification of the issues to be addressed in the review are critical to its success. This occasionally takes some extra time and effort to accomplish because you need to be open to hearing and understanding all the factors driving an issue, not just those the most senior or experienced person in the room may think. The information gleaned is critically important to really understanding what's creating the issue, who's involved, and its impacts. Likewise, it is also extremely important to design your process to allow those involved to feel both free and comfortable in sharing their feedback open and honestly.
- Involved development of ideas and strategies to resolve the issues – As with employee involvement in the process to help identify issues, it is also important to have them involved in helping to create and shape the best ideas and strategies to resolve the issues. In too many cases, the project leader or lead project team wants to jump quickly to solutions without involving others in the process because they think they know what's best, are afraid their employees may come up with radical ideas that they would not be able to support, or they are pressed for time and need to finish the process quickly to move to implementation.
- Development of an action plan to help move the work forward – In order to move the review and recommendations work forward, develop an action plan by writing down your follow-up goals and next steps, assigning follow-up responsibilities, establishing follow-up timelines, and developing specific metrics to measure your progress. Too often this step is short changed or omitted and leads to many good ideas dying on the vine and project participants feeling the process was a failure because no follow-up occurred.

Provided below are a couple of organizational/departmental review projects I'm currently working on that have been designed with thoughtful consideration of the key factors mentioned above and are producing meaningful and actionable results for my clients. Please feel free to contact me for a no obligation consultation if you are interested in learning more. It truly is the process that matters!



## Winston Salem Department of Transportation Review

Project Purpose and Goals: The City of Winston Salem Department of Transportation engaged Westmoreland Strategic Enterprises, LLC to conduct an organizational review of the Department and to assess the following items:

- Departmental decision-making protocols with a goal of pushing decision making to the right levels in the organization
- Departmental project management and delivery needs with a goal of enhancing overall project management and delivery capacity, efficiency, and effectiveness
- Departmental workload and functional assignments with a goal of optimizing the effective/necessary work and functions of staff and to minimize or eliminate all unnecessary work and functions of staff
- Development needs of key team members and staff with a goal of having all team members properly skilled and equipped to do their jobs confidently, competently, and effectively and to be prepared for upward advancement when opportunities present themselves in the Department
- Strategic plan implementation and overall work/performance tracking with a goal of ensuring the Department is measuring and reporting on right metrics to more fully inform the community on overall Department services and impact.

Project Contact: Toneq' McCullough, Department of Transportation Director ([toneqm@cityofws.org](mailto:toneqm@cityofws.org))

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## Town of Morrisville Project Management and Delivery Systems Review

Project Purpose and Goals: The Town of Morrisville engaged Westmoreland Strategic Enterprises, LLC to conduct a review of Town's current project management and delivery systems by assessing the following items:

- Review project status of certain key capital projects with goal of ensuring project status, schedules, and estimated costs are complete, updated, and reliable.
- Review Town's current project management and delivery systems structure, processes, resources, and tools with goal of identifying organizational needs and enhancements to improve overall capabilities, effectiveness, and impact of systems.
- Recommend new strategic tools and resources with goal of enhancing overall community, council, and staff support and trust in the Town's project management and delivery systems.

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