


## DEVELOPING A SHARED VISION FOR A SPECIFIC COLLABORATION

Tools T&V3.01 to T&V3.07 will have helped you move from a strategic position of “what shall we share” to “let’s choose which ones to start with”. This is the next step in working with one of your chosen services.

This tool enables your workgroup, service users and the leaders in the partnership to “paint a picture” of what the “*new world*” would **feel like** as a result of the new shared service being in place.



You cannot write a shared service business case if there is no shared vision between the partners...

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### What are the benefits of these tools to you and your colleagues?

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[Dominic.Wallace@sharedservicearchitects.co.uk](mailto:Dominic.Wallace@sharedservicearchitects.co.uk)

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These are pathway seminars to the Postgraduate Certificate in Collaborative Transformation at Canterbury Christ Church University

# Tool: T&V4.01

## DEVELOPING A SHARED VISION FOR A SPECIFIC COLLABORATION

*A shared vision document must have pictures, it must have personalised stories of how users will benefit (for example, “A day in the life of a user”)*

Tools T&V3.01 to T&V3.07 will have helped you move from a strategic position of “what shall we share” to “let’s choose which ones to start with”. This is the next step in working with one of your chosen services.

Tool T&V4.01 enables your workgroup, service users and the leaders in the partnership to “paint a picture” of what the “new world” would **feel like** as a result of the new shared service being in place.

The outcome of this activity will feed into the drafting and publication of the shared vision document which will drive the business case.

### The role of a shared vision document

A shared vision document<sup>1</sup> will help to flesh out the project definition and support the business case development, which in-turn will define the detailed requirements.

Returning to the vision document during the project can make sure partners are staying true to the project's goals. This is important because shared visioning is more complex than for a single organization.

The Planning Advisory Service are clear that, “Agreeing a shared vision and set of outcomes in an individual organization can be challenging. Generating and agreeing a shared vision in collaboration can be even more so.”<sup>2</sup>

The evidence in this book is that you cannot have effective shared vision formed by a group of partners unless they possess:

- a common agenda for change<sup>3</sup>
- a common language<sup>4</sup>

<sup>1</sup> Grey, B. (2008) p668. “A critical task for launching a new partnership is that of visioning, which involves recognising the potential value of a collaborative alliance, imagining how the parties can collaborate, and conveying this vision to them.”

<sup>2</sup> Planning Advisory Service (2008) p8. The PAS also recommend that projects should “think big, act small” meaning within the vision should be areas of early success and quick wins.

<sup>3</sup> Tools 1.01, 1.02, 1.03

- absolute in-house support from key decision makers in their organization<sup>5</sup>
- a belief that it is within the powers of the partners to deliver a new service that cannot be derailed by external influences<sup>6</sup>

This is the reason why the shared vision document work appears towards the end of this book. At its simplest, if there is not even a common language between partners, there cannot be a common shared vision.

### What should be in a shared vision document?

Lambeth Council’s Transformation Academy<sup>7</sup> suggests that the document...

- be a compelling picture of the future, creating a shared need and urgency for change
- “push” people into action, but the vision steers them in the right direction.
- provide a ‘motion picture’ of the behaviours required for success at all levels so as to clarify the general direction for change.
- act as a beacon that assists in identifying the behaviours that must be enhanced as well as those behaviours that must be eliminated.

Therefore a vision document is an “emotional, inspiring document” not a dry vaguely aspirational statement in MSWord or a PowerPoint presentation.

A shared vision document must have pictures, it must have personalised stories of how users will benefit (for example, “A day in the life of a user”)<sup>8</sup>.

<sup>4</sup> Tools 2.05 & 2.06

<sup>5</sup> Tools 2.07, 3.01, 3.02, 3.05, 3.06 & 3.07

<sup>6</sup> Tools 3.08 & 3.09

<sup>7</sup> Lambeth Council Transformation Academy (2009).

<sup>8</sup> Moore, et al (1999). Cited in Gray, B. “Visioning is a process in which people build consensus on a description of their preferred future – the set of conditions they want to see realised over time.”

## Step 4 - Creating the shared vision

*You must invite service users, current delivery staff and final decision makers from across the partners to take part in this activity.*

It should have personalised stories of how staff in the partners will be able to deliver a better service to users.

There should be an excitement in the potential outcome, even for staff who are concerned about their future, if the vision is implemented.

### Embedding vision in reality

However, a vision document cannot divorce itself from the reality of the cost of delivery. It must be able to evidence that it mixes improved delivery with the ability to deliver more, for the same or less resource than at present. Professor Dexter Whitfield sums it up as: “A progressive shared services strategy should... focus on innovation and best practice, sharing investment costs, minimising transaction costs and service improvement strategies!”

### Developing the passion and commitment

The best way to develop the passion and commitment for a shared vision is through a creative workshop setting, in which people are on their feet and debating issues with each other on a range of subjects.

There has to be a buzz, an exchange of views, minds changed and joint working towards common goals<sup>2</sup>. Personal experience stories have to be shared and laughter has to be generated in the gentle irony of the public sector culture.

Tool T&V4.01 demands that to work up this vision in the room there must be:

- Service users, ie residents, students, patients or colleagues if it is an internal staff-to-staff service
- Decision makers who want to contribute and will champion the vision at board level
- Staff who operate the service and are hungry for improvement

<sup>1</sup> Whitfield, D. (2006) p26.

<sup>2</sup> Tomkinson, R. (2007) p129 “The abilities of partners and potential partners to compromise and to give some ground for the greater good is essential to forming a strong rapport that will facilitate progress.”

### How to use this tool:

This “future scenario” technique has been used effectively by shared services workgroups. It provides a safe space for everyone present to share their wisdom and emotions, and innovate, without the impediment of existing ways of working.

You must invite service users, current delivery staff and final decision makers **from across the partners** to take part in this activity. There could be 20 or more people in the room for this important visioning process.

### Preparation activity

You will need an A1 pad, with at least three sheets of paper, for each of the stakeholder groups who are to be involved. (eg one for residents, one for staff, one for decision makers etc.)

Before the workgroup come into the room, prepare the three sheets.

1. **Leave the top sheet blank.** Its purpose is to cover up the other sheets whilst you are setting the scene and introducing the activity.
2. **Page 2 on your pad.** On this sheet write “What are the XXX saying about it, that made the judges award your shared service the prize for ‘best XXX experience’? Substitute the ‘XXX’ on each chart with one of your stakeholder groups, eg students, staff, decision makers. (See opposite page)
3. **Page 3 on your pad:** Set this out as shown in Step 3 over the page. Your session group will use this page to convert their suggestions to a “story” of what the new service should feel like and therefore what the business case should focus on.

How to use the tools is set out on the following pages.

# Tool: T&V4.01

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### Step 1

What are the service users saying about it, that made the judges award your shared service the prize for 'best user experience'?

All the services I need are now in the library

I can go into any of the partners' centres to solve a problem

The same person sorted out all my problems with three organisations

On the second page, of each AI pad, set out the question for the relevant stakeholders in the format shown...

- **Service users:** What are the students (or residents, or patients, or colleagues who use the system, professional agents, etc) saying about it?
- **Service staff:** What are the staff who will work to deliver it, saying about working in the new service?
- **Decision makers:** What are the leadership of the partners (councillors, principals, chief execs, VP, etc) saying about the new service?

Ask your vision session group (many of whom will be these people) what those individuals will want from the new service...

**Ask each person to put at least three suggestions (one per post-it note) onto all of the AI pads.**

#### Opening the complaints file...

You may also wish to reveal, just before this exercise, a list of repeated problems and complaints in the way the service is currently delivered. They could be the catalyst for suggestions on how the new service will resolve them.

### Step 2

Then ask the stakeholders in the room to gather around the AI pad that is about them.

Eg All staff together, all decision makers together...

- Ask them to discuss the post-it notes and cluster them into common themes (there is no limit to the number of themes)
- They can also add new post-its or themes too
- Finally ask them to circle the cluster and sum up the theme in a phrase and write it beside the cluster.

What are the staff in the new service saying about it, that made the judges award your shared service the prize for 'best staff experience'?

3 days maximum for registration

More flexible working hours

Can be operated from anywhere

A common performance dashboard

A single, online application form

### Step 3

Rip off the second page on your AI pads.

Then ask your groups to translate each cluster theme into a mini-story on page 3 of their AI pad. For example:

- *“I can now go into the contact centre nearest to where I live, even though it is not my own college, and they help sort out any problems.”*
- *I now have a choice of locations where I can work from, which is really good for picking up my daughter on a Thursday.*
- *“The new common performance dashboard helps me understand not only our activity each week, but the partners’ as well which helps strategic decision making.”*

Each stakeholder will have many stories from the post-it note themes in Step 2.

### The service users’ story

*Under the new,  
better service:..*

Draw a picture  
of the user here...

1. *I can now ...*

2.

3.

Name:

4.....

5.....

6.....

7.....

#### Some important notes

1. Each group of stakeholders in your sessions (eg service users, service staff, decision makers, etc) should work on the story relating to themselves.
2. All of the mini-stories should be full sentences, and in the first person. Eg *“I can now do this...”, “I am able to...”*. The personalisation gives them higher impact.
3. Ask each group to draw a picture and name the person whose story they have created. It will add some fun to what is a serious and intensive task, but also will help you in the next step.

## Step 4 - Creating the shared vision

### When step three is complete...

- The visioning session should last most of a morning or afternoon.
- Once your stakeholders have completed Step 3, explain to them that your workgroup will do the next step (see below) and feed back to them with a first-draft vision document made up of their mini-stories.
- Thank them for coming and promise a deadline for sending them the draft.

## Step 4

### Turning the vision into compelling stories of a better service.

1. Using the stakeholders' mini-stories, and the knowledge of the problems that exist in the current way things are done, develop realistic vision stories that set out what the new service will feel like as a user, member of staff in the service, decision maker, etc.

The vision stories should reflect the clustered themes from the visioning session.

They should also explain how past problems are resolved by the new service.

2. Set them out, one page per stakeholder in an eye-catching design (see below). For example using pictures of fictional stakeholders to enhance the story.
3. You can then use these visions in the next tool, to prepare a vision document.



*“On Monday a resident phoned to ask for help with his elderly mother who was leaving hospital and needed support. I was able to go straight into the system and trigger the pro-active “independence” service across all the concerned agencies.*

*Under the old system we had to contact four different agencies and each had their own application form too. It was complex and often took over a week for anything to happen.*

*The most sensible thing we ever did was to create a shared service for supporting people back into independence.*

*Whether it’s a young person leaving care, a prisoner returning into the community or elderly person leaving hospital, the joined-up service structure has transformed their experience, and ours in dealing with these issues.”*

**Christine Dethan**  
**General Practitioner**

# Tool:T&V4.0 I

## USER LOG

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| Project & date tool used | What was the desired outcome of using this tool? | What actually happened? | What would you do differently next time? |
|--------------------------|--|-------------------------|--|
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