UNDERSTAND WHAT NEEDS TO CHANGE

An organization is more than its reporting lines

A new organization chart can make a change look clear before the work underneath it is understood. Who will make decisions? Who will carry the handoffs? What will happen to the responsibilities that do not fit neatly into a job description?

When you are growing

Hiring can bring needed capacity and expertise. It can also add coordination work, stretch managers, and multiply confusion about ownership. Ask whether the constraint is too little capacity, a missing capability, or a process that needs to change.

When you are getting smaller

Removing a role does not remove its work. If every commitment stays in place, a smaller team can inherit an impossible workload. Decide what will stop, become simpler, happen less often, or receive fewer resources. Make the tradeoffs explicit.

People's questions belong in the planning

Will I still have a place here? Will my responsibilities change? Will I have the support to do what is being asked of me? These questions concern identity, trust, and livelihood. Be clear about what is decided, what people can influence, and when they will hear more. Avoid promises you cannot keep.

A workable structure connects priorities, capacity, decision-making, and relationships. It gives people a realistic way to deliver what the organization is asking of them.

Use the next pages to explore one team, function, or service. Begin with the work and involve the people who understand how it happens.

BEFORE YOU REDRAW THE ORGANIZATION

Start with these questions

Agree on the scope and planning period. Separate what you know from what you are assuming, especially about demand, funding, and available capacity.

01 / What must this organization deliver?

Which outcomes matter in the next chapter? What commitments are essential, and what can change? Name the reason for redesign and the constraints it must address.

02 / What work should grow, change, or stop?

Map the recurring work, informal responsibilities, and handoffs. What creates value? What is duplicated or no longer needed? If resources are shrinking, name the work you will reduce along with them.

03 / What capacity and capabilities do we need?

Compare demand with the time and skills available. Include coordination, management, learning, leave, and transition work. Where do you need more expertise? Where does the plan depend on sustained overload?

04 / How should ownership and decisions work?

Define responsibilities before assigning people. Who owns each outcome, who can decide, and who needs to contribute? Test the handoffs and the support managers can realistically provide.

05 / What will help people navigate the change?

What will change for each group? Plan communication, knowledge transfer, learning, and support. Clarify who leads the transition and how you will notice if the new structure is not working.

The goal is a structure that can do the work you are choosing to keep.

What if the questions reveal something bigger?

Capacity problems can involve unclear roles, competing priorities, or processes your team has outgrown. The Roadmap helps you see how those pieces fit together and decide what needs attention before you change the structure.

Explore the Roadmap | Book a Call

Two situations. The same starting point: the work.

Scaling up / Demand has outgrown the team

Imagine a service team with a growing backlog. The first proposal is to add two generalist roles. Mapping the work reveals that routine requests and complex cases share one queue, and every exception waits for the same manager.

A more deliberate next step

The leader clarifies decision authority, separates the queues, and measures the remaining gap. That evidence helps define the expertise and capacity a new role should add. The plan includes onboarding time and checks on response quality, workload, and manager capacity.

Scaling down / The budget can no longer support the plan

Imagine a team asked to reduce staffing while keeping every service unchanged. Mapping the work shows that doing so would depend on overtime and leave one person responsible for several critical activities.

A more deliberate next step

The leader revisits the service commitments, reduces lower-priority work, and names owners and backups for what remains. The transition plan makes room for knowledge transfer and support for affected people. It checks workload, service quality, and cost against the revised commitments.

A CONVERSATION ABOUT THE WORK AHEAD

Map the change you need

Complete this with people who understand the work. Use a separate sheet for each major workflow if you need more detail.

The team, function, or service we are exploring

What is changing, why, and over what planning period? Who contributed?

Our essential outcomes

What must we deliver? What commitments or assumptions need to be revisited?

The work we will grow, simplify, reduce, or stop

Be specific about activities and service levels, including informal work and handoffs.

The capacity and skills we need

Where is the gap? What evidence supports it? Include management and transition time.

The responsibilities and decisions we need to clarify

Who owns each outcome? Who decides? Where are handoffs or backup arrangements missing?

FROM A PROPOSED STRUCTURE TO A WORKABLE CHANGE

Plan the transition

Choose a next step that tests your assumptions. Before finalizing staffing changes, identify the HR and legal review needed for your situation.

Our proposed change and tradeoffs

What will change? What will we stop or deprioritize so the plan is realistic?

The people and support

Who is affected? What communication, learning, handover, or support will they need?

The owner, sequence, and timing

Who leads? What must happen first? Who needs to contribute before decisions are final?

How we will know it is working

When will we review workload, quality, cost, and people's experience? What would prompt a revision?

Let's make a plan for what comes next.

You don't need a finished organization chart before asking for help. Our Roadmap helps you understand the work ahead, align roles and capacity with your priorities, and plan the changes your people will need to navigate.

Explore the Roadmap

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