



Strategic Vision to Delivery

How to Break Down Work Effectively

-Kevin Sutherland



Example



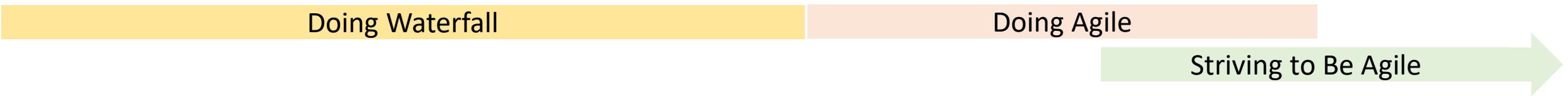
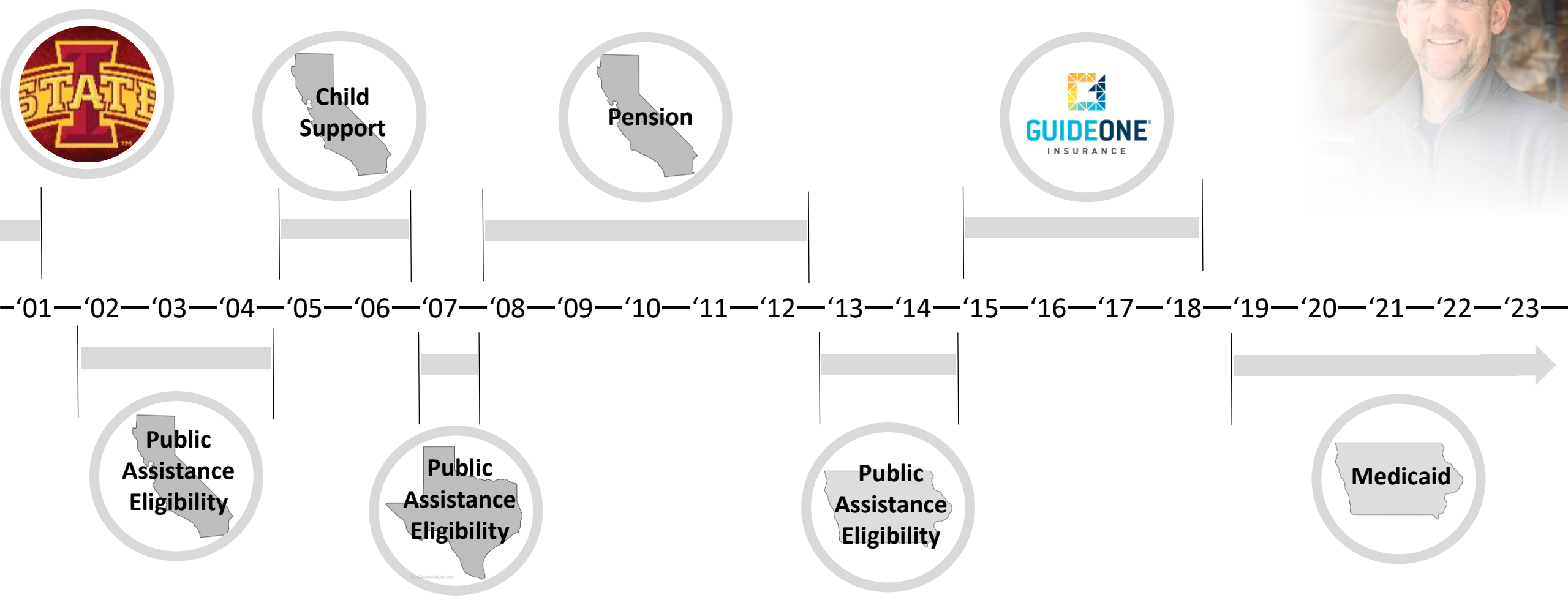
Department of the Treasury
Internal Revenue Service

IRS gets \$15M to find out if it can create online tax return system so Americans can file for free

Third party will weigh in on feasibility



About me...

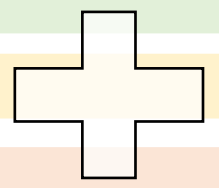


How do we achieve this???

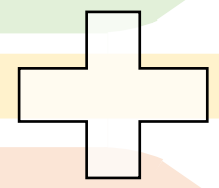
Being Agile



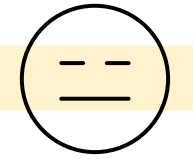
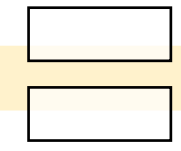
Major Transformation



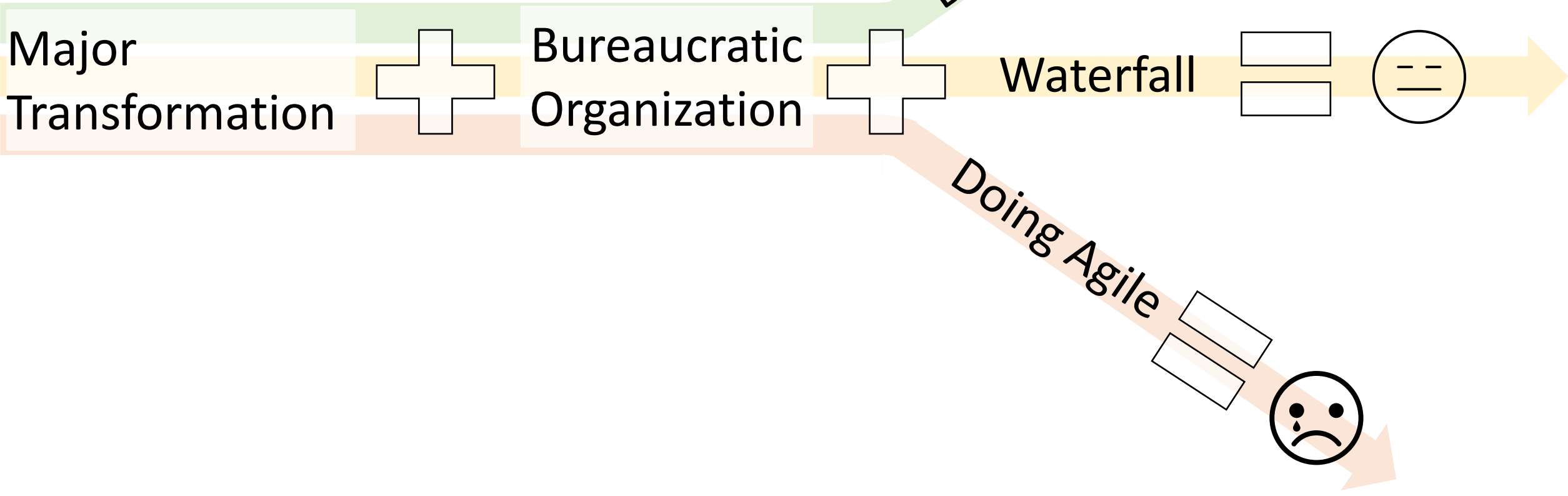
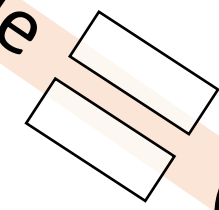
Bureaucratic Organization



Waterfall



Doing Agile





Strategic Vision to Delivery

Learning Objectives

By the end of this session, you should be able to:

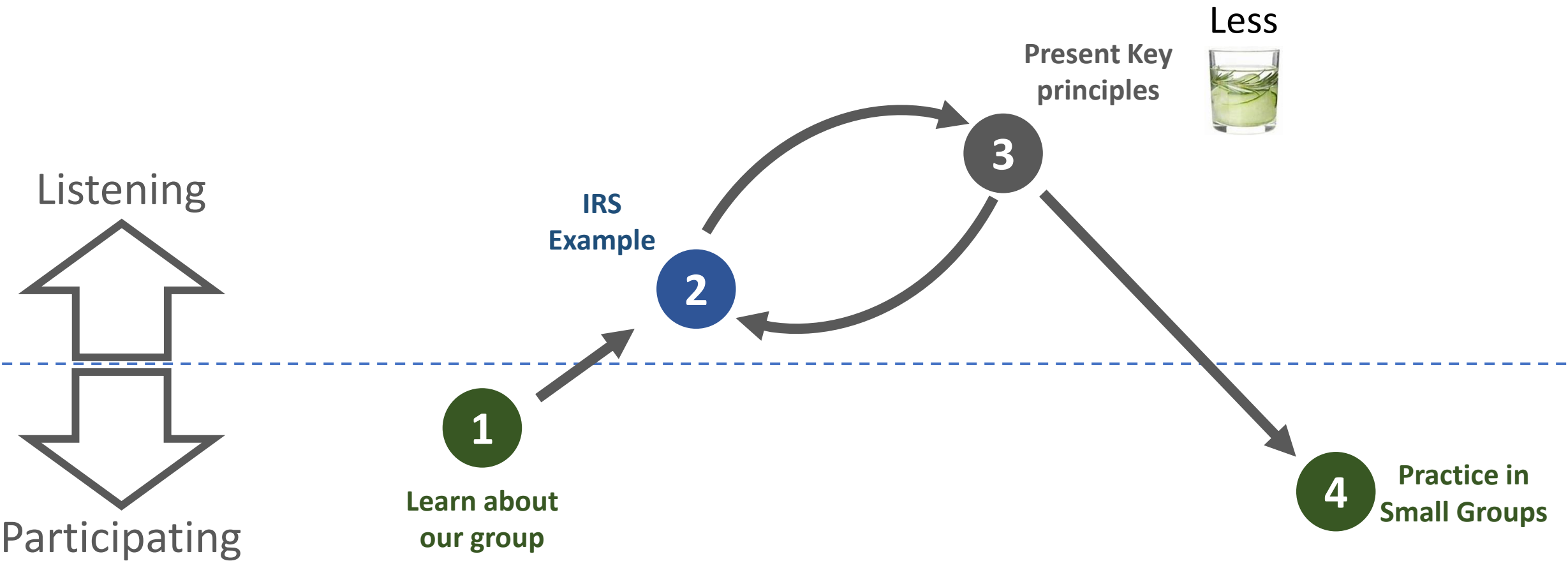
- Categorize the domain and management approach for your work
- List and describe principles for effective work delivery
- Apply three work breakdown approaches to your work situation



Less



Presentation Flow





**What are you
working on?**

**What is the strategic vision / high-level
organizational goal is your team focused on
achieving?**





**What are you
working on?**

How would you categorize your work?



The Westrum Model

Model for assessing organizational culture based on information flow through the organization

Pathological

(Power-Oriented)

Bureaucratic

(Rule-Oriented)

Generative

(Outcome-Oriented)

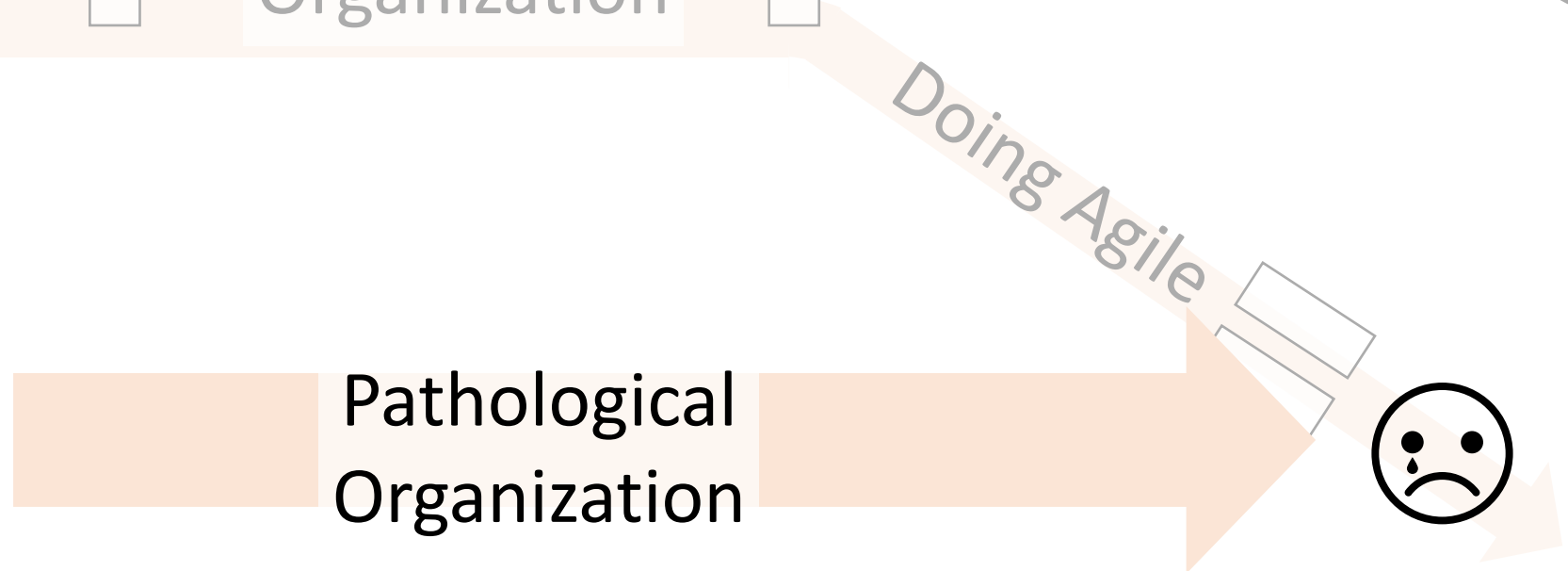
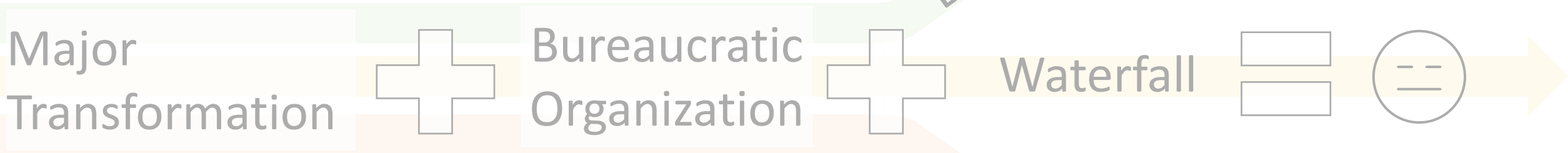
Assessed based on how we:

- Collaborate
- Respond to bad news
- Address risks
- Support cross-functional engagement (bridging)
- Handle failure
- Respond to novelty

The Westrum Model

Model for assessing organizational culture based on information flow through the organization

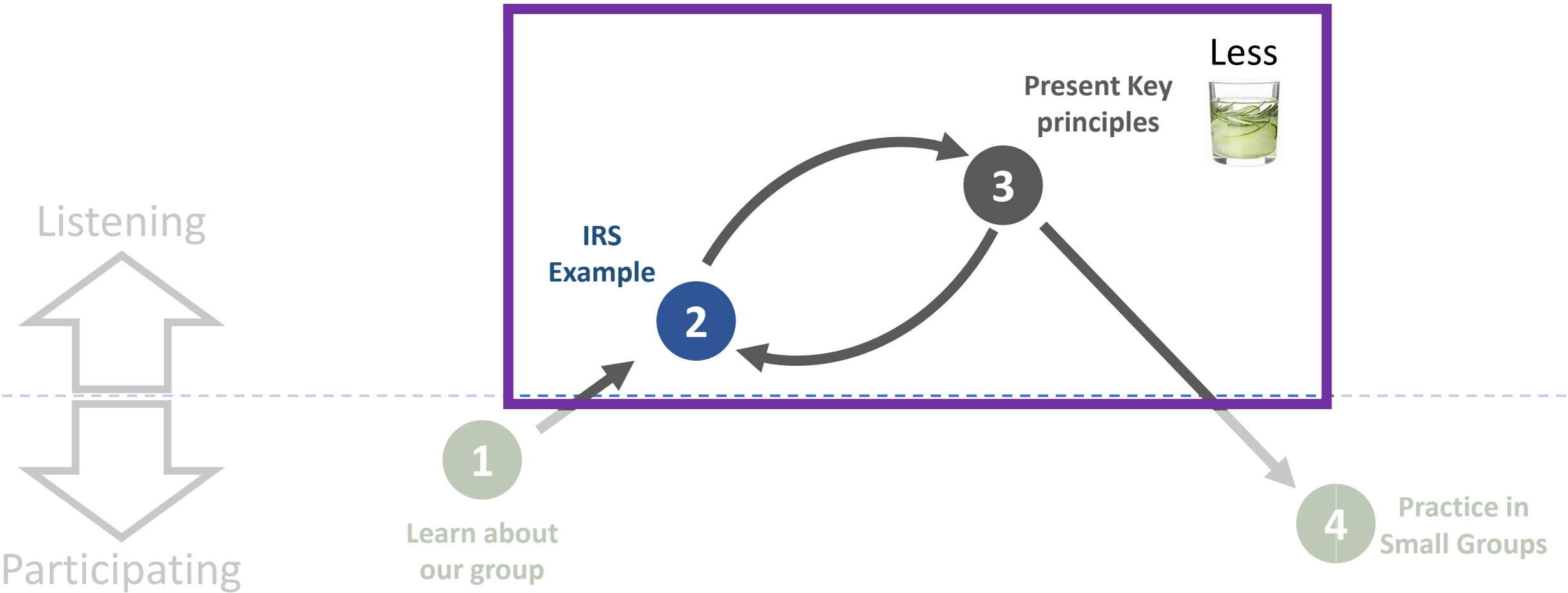
	Pathological (Power-Oriented)	Bureaucratic (Rule-Oriented)	Generative (Outcome-Oriented)
Collaboration	Low	Modest	High
Response to Bad News	Messenger Shot	Messenger Neglected	Messenger Encouraged
Risks	Avoided	Assigned	Shared
Bridging (Reducing Silos)	Discouraged	Tolerated	Encouraged
Failure Leads To	Scapegoating	Justice	Inquiry/Learning
Response to Novelty	Crushed	Creates Problems	Implemented



Being Agile

Doing Agile

Presentation Flow



Example



Department of the Treasury
Internal Revenue Service

Primary purpose: Collect tax revenue



~\$4.5 Trillion (Estimate ~500B unpaid)



~335M Citizens + Businesses



~80,000 employees



~7,000 IT staff

Current status:



Limited digital presence



Complex / conflicting policy



Tightly coupled, antiquated systems

Example



Department of the Treasury
Internal Revenue Service

We've been allocated \$15M to figure out how to spend \$80B...

What should we do next?



Create a 5-year strategic plan



Initiate an agile transformation



Perform enterprise architecture analysis



Launch an outcome-focused, empowered team

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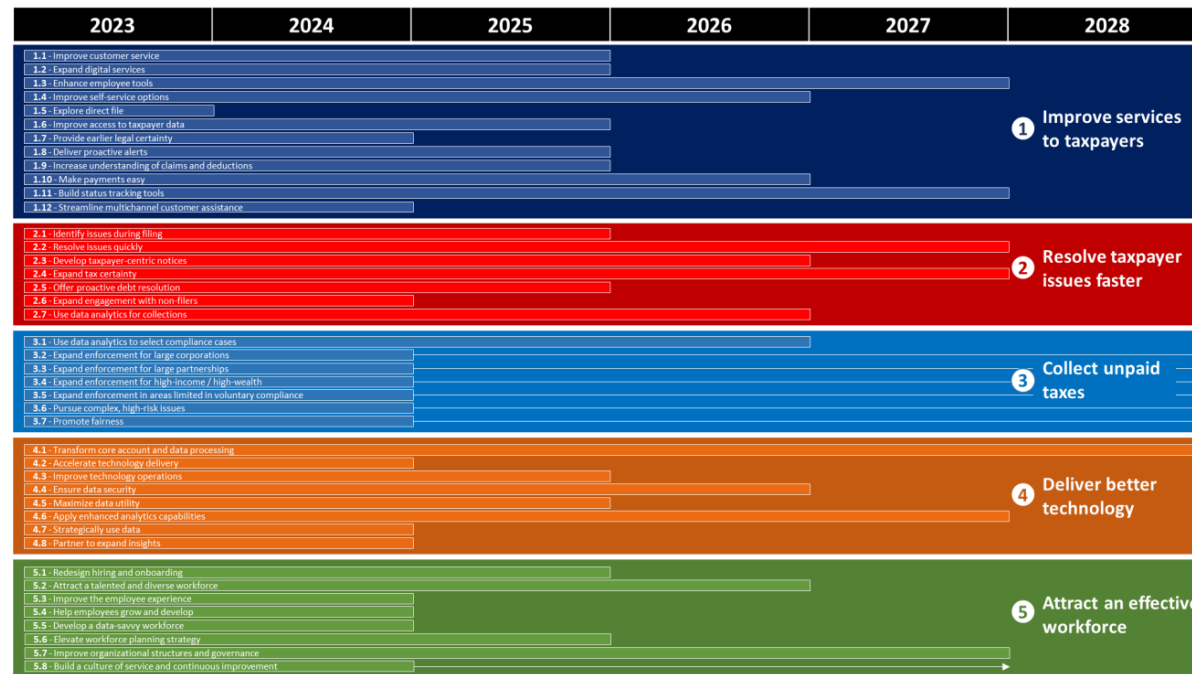
Example



Department of the Treasury
Internal Revenue Service



Create a 5-year strategic plan



5 objectives
42 initiatives
195 projects
199 milestones

Example



Department of the Treasury
Internal Revenue Service

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Less

Principles for effective delivery of complex work



Prioritize **SAFETY**



Lead with **VISION**



Focus on **OUTCOMES**



Do **LESS**



Do it **SOONER**



Do it **BETTER**



Do it **TOGETHER**



LEARN and repeat



Principles for effective delivery of complex work

Applicable to work breakdown



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LEARN and repeat

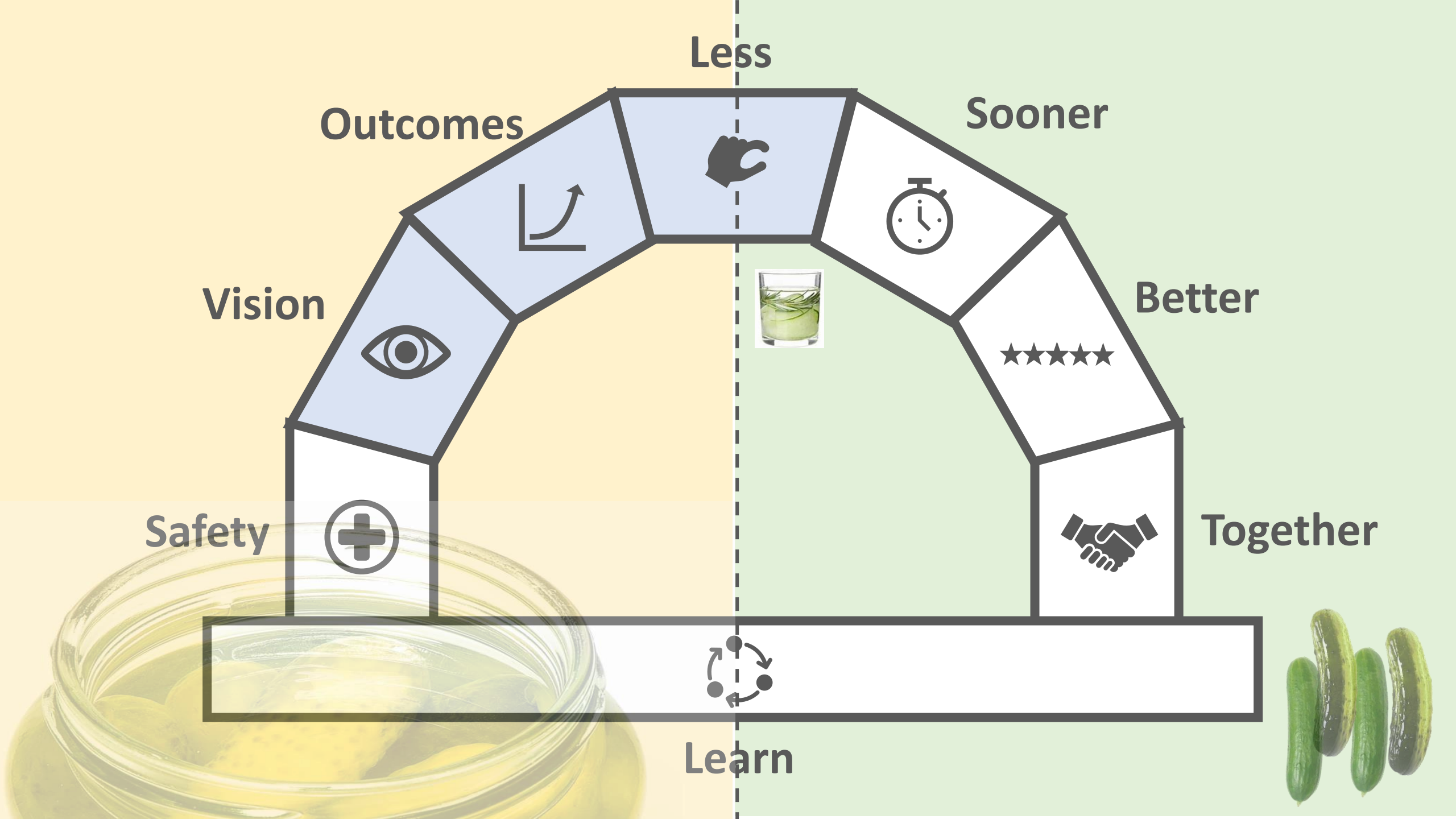


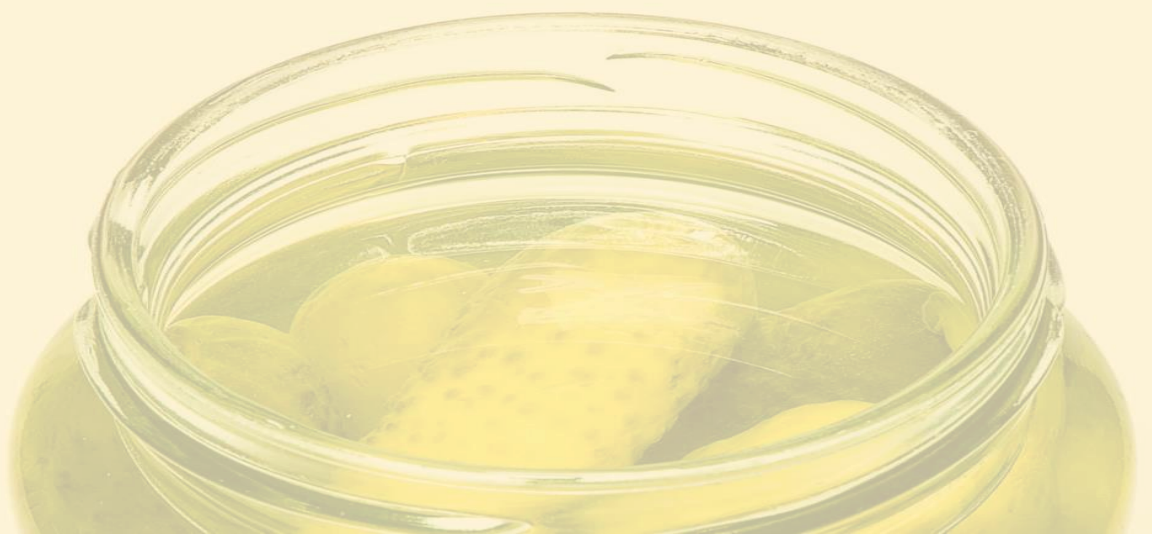
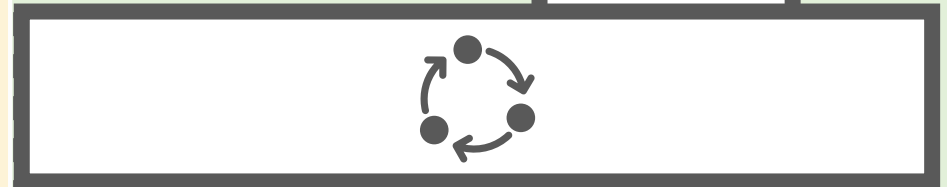
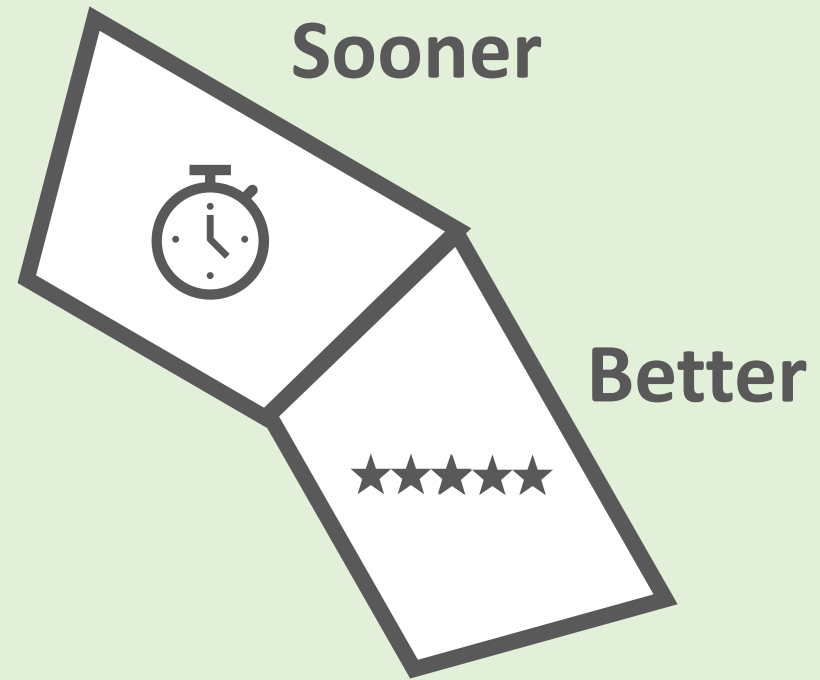
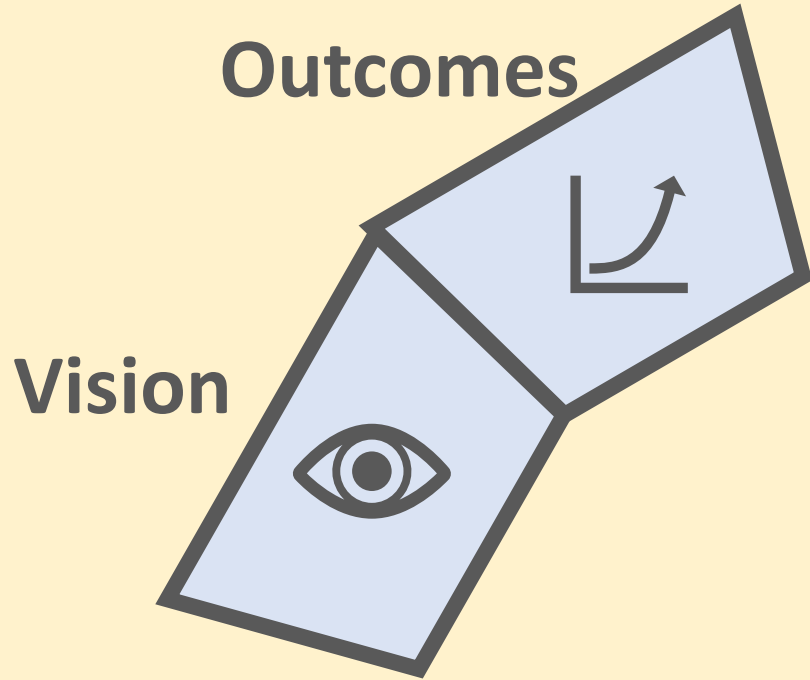
Prescott Pickle Principle

“Cucumbers get pickled more than the brine gets cucumbered”

-Jerry Weinburg, Secrets of Consulting







2023	2024	2025	2026	2027	2028 - 2033
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1.1 - Improve customer service			6 projects, 5 milestones		
1.2 - Expand digital services			7 projects, 6 milestones		
1.3 - Enhance employee tools				4 projects, 6 milestones	
1.4 - Improve self-service options			6 projects, 4 milestones		
1.5 - Explore direct file	3 projects, 2 milestones				
1.6 - Improve access to taxpayer data			3 projects, 4 milestones		
1.7 - Provide earlier legal certainty	2 projects, 3 milestones				
1.8 - Deliver proactive alerts			4 projects, 3 milestones		
1.9 - Increase understanding of claims and deductions			8 projects, 10 milestones		
1.10 - Make payments easy			4 projects, 5 milestones		
1.11 - Build status tracking tools				5 projects, 5 milestones	
1.12 - Streamline multichannel customer assistance	4 projects, 5 milestones				

1 **Improve services to taxpayers**
(\$4.3B)
 12 initiatives
 56 projects, 58 milestones

2.1 - Identify issues during filing			3 projects, 2 milestones		
2.2 - Resolve issues quickly				6 projects, 4 milestones	
2.3 - Develop taxpayer-centric notices			6 projects, 3 milestones		
2.4 - Expand tax certainty				4 projects, 5 milestones	
2.5 - Offer proactive debt resolution			5 projects, 4 milestones		
2.6 - Expand engagement with non-filers	4 projects, 4 milestones				
2.7 - Use data analytics for collections			6 projects, 5 milestones		

2 **Resolve taxpayer issues faster**
(\$3.2B)
 7 initiatives
 34 projects, 27 milestones

3.1 - Use data analytics to select compliance cases			6 projects, 4 milestones		
3.2 - Expand enforcement for large corporations	1 projects, 3 milestones				
3.3 - Expand enforcement for large partnerships	2 projects, 3 milestones				
3.4 - Expand enforcement for high-income / high-wealth	1 projects, 3 milestones				
3.5 - Expand enforcement in areas limited in voluntary compliance	1 projects, 3 milestones				
3.6 - Pursue complex, high-risk issues	4 projects, 3 milestones				
3.7 - Promote fairness	3 projects, 4 milestones				

3 **Collect unpaid taxes**
(\$47.4B)
 7 initiatives
 18 projects, 23 milestones

4.1 - Transform core account and data processing					5 projects, 11 milestones
4.2 - Accelerate technology delivery	4 projects, 2 milestones				
4.3 - Improve technology operations			4 projects, 6 milestones		
4.4 - Ensure data security				4 projects, 8 milestones	
4.5 - Maximize data utility			5 projects, 8 milestones		
4.6 - Apply enhanced analytics capabilities				5 projects, 5 milestones	
4.7 - Strategically use data	8 projects, 6 milestones				
4.8 - Partner to expand insights	4 projects, 4 milestones				

4 **Deliver better technology**
(\$12.4B)
 8 initiatives
 39 projects, 50 milestones

5.1 - Redesign hiring and onboarding			8 projects, 7 milestones		
5.2 - Attract a talented and diverse workforce			5 projects, 9 milestones		
5.3 - Improve the employee experience	6 projects, 4 milestones				
5.4 - Help employees grow and develop	9 projects, 5 milestones				
5.5 - Develop a data-savvy workforce	4 projects, 3 milestones				
5.6 - Elevate workforce planning strategy			6 projects, 2 milestones		
5.7 - Improve organizational structures and governance				4 projects, 3 milestones	
5.8 - Build a culture of service and continuous improvement	6 projects, 8 milestones				

5 **Attract an effective workforce**
(\$8.2B)
 8 initiatives
 48 projects, 41 milestones

Principles for effective breakdown of complex work



Lead with **VISION**



Focus on **OUTCOMES**



Do **LESS**



Existing enterprise architecture

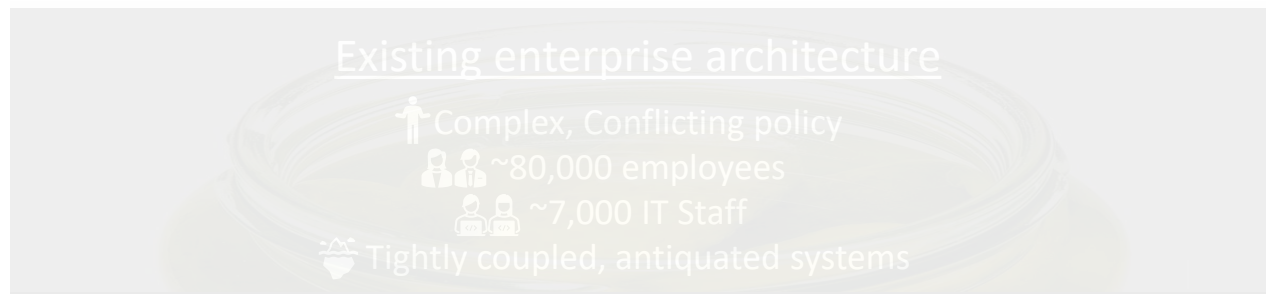
- Complex, Conflicting policy
- ~80,000 employees
- ~7,000 IT Staff
- Tightly coupled, antiquated systems

Principles for effective breakdown of complex work

	2023	2024	2025	2026	2027	2028
1.1	Improve customer service					
1.2	Expand digital services					
1.3	Enhance employee tools					
1.4	Improve					
1.5	Expand					
1.6	Improve					
1.7	Improve					
1.8	Improve					
1.9	Improve					
1.10	Improve					
1.11	Improve					
1.12	Improve					
2.1	Identify					
2.2	Identify					
2.3	Identify					
2.4	Expand					
2.5	Offer proactive debt resolution					
2.6	Expand engagement with non-filers					
2.7	Use data analytics for collections					
3.1	Use data analytics to collect compliance					
3.2	Expand enforcement for large corporations					
3.3	Expand enforcement for large partnerships					
3.4	Expand enforcement for high-income filers					
3.5	Expand enforcement in areas limited to a					
3.6	Expand compliance high-risk cases					
3.7	Dominate business					
4.1	Accelerate technology delivery					
4.2	Improve technology operations					
4.3	Improve data security					
4.4	Improve data quality					
4.5	Apply enhanced analytics capabilities					
4.6	Strategically use data					
4.7	Partner to expand insights					
5.1	Redesign hiring and onboarding					
5.2	Attract a talented and diverse workforce					
5.3	Improve the employee experience					
5.4	Help employees grow and flourish					
5.5	Develop a data-driven workforce					
5.6	Revise workforce planning strategy					
5.7	Improve organizational structure and governance					
5.8	Build a culture of service and continuous improvement					

Create a simple, world-class user experience for tax-payers that effectively collects all taxes due, equitably, with minimal effort from taxpayers and IRS support staff

- Improve the taxpayer experience
- Improve IRS staff experience
- Increase tax burden equity
- Increase collection of unpaid taxes (\$500B Annually)
- Advance national interests



Lead with **VISION**



Focus on **OUTCOMES**



Do **LESS**

Principles for effective breakdown of complex work



Lead with **VISION**

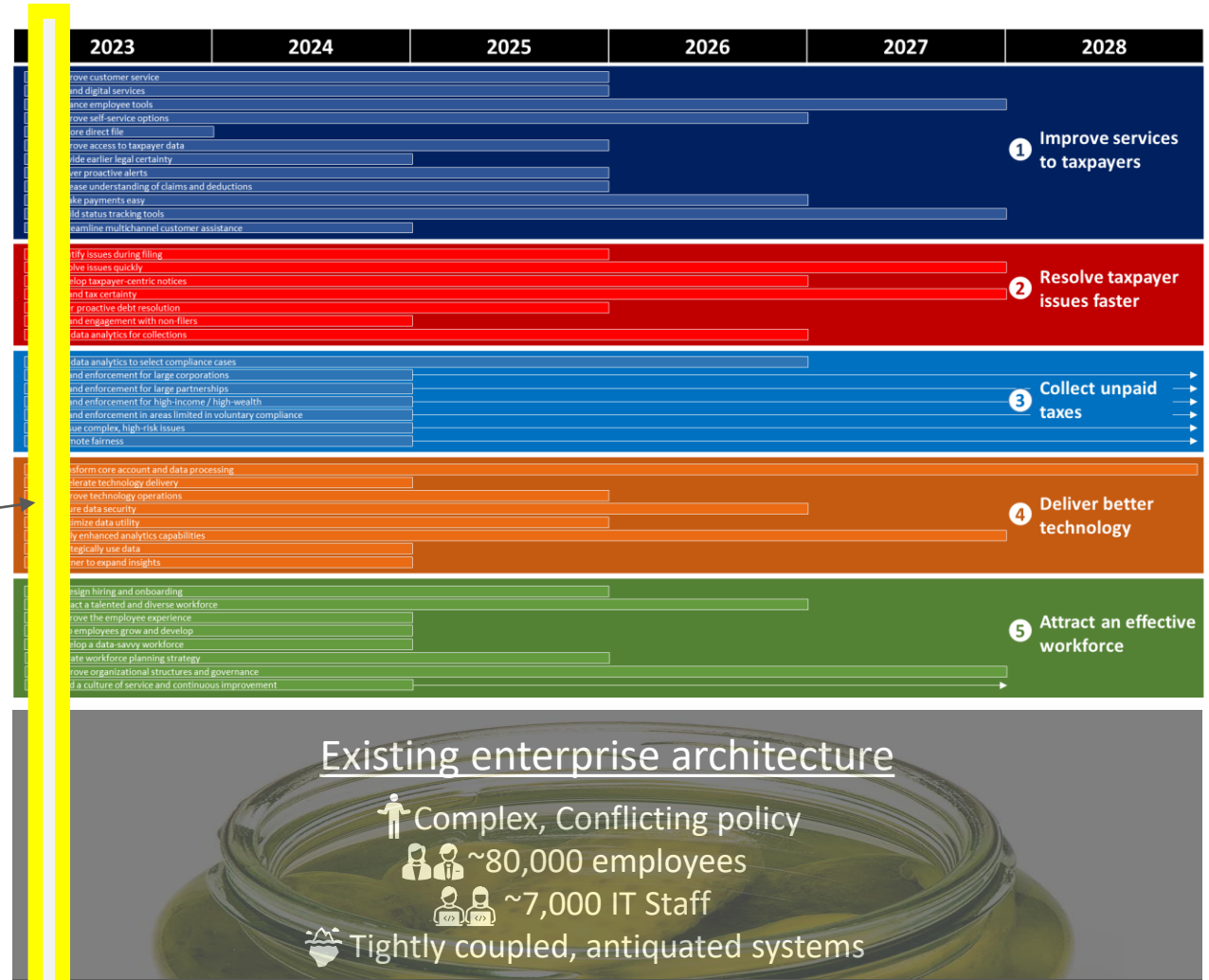


Focus on **OUTCOMES**



Do **LESS**

- Outcome hierarchy
- Scope segmentation
- Minimum viable product (MVP)

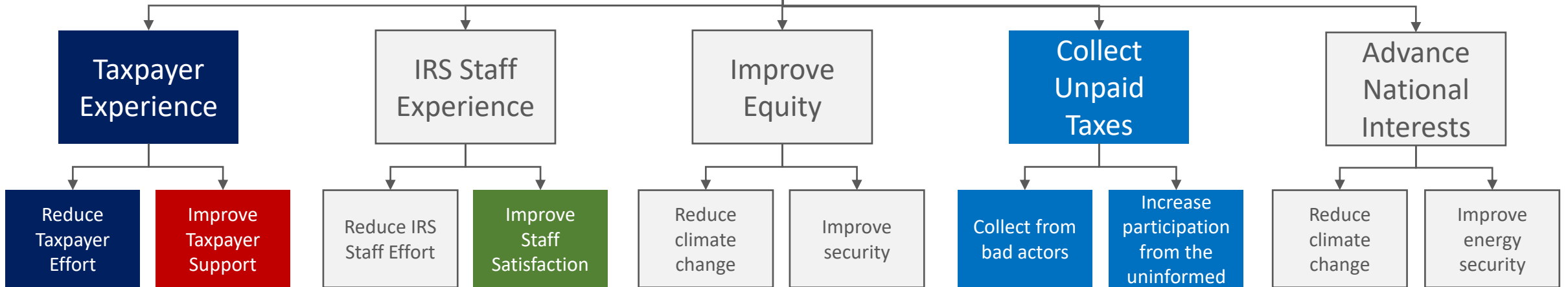




Do Less – Work Breakdown Methods

Create a simple, world-class user experience for taxpayers that effectively collects all taxes due, equitably, with minimal effort from taxpayers and IRS support staff

Outcome Hierarchy

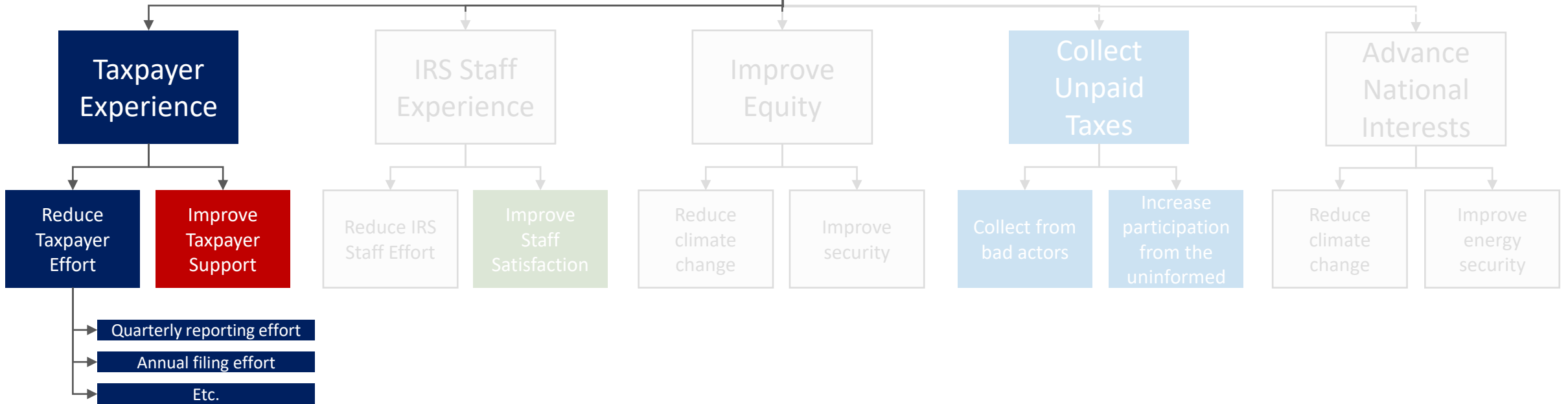




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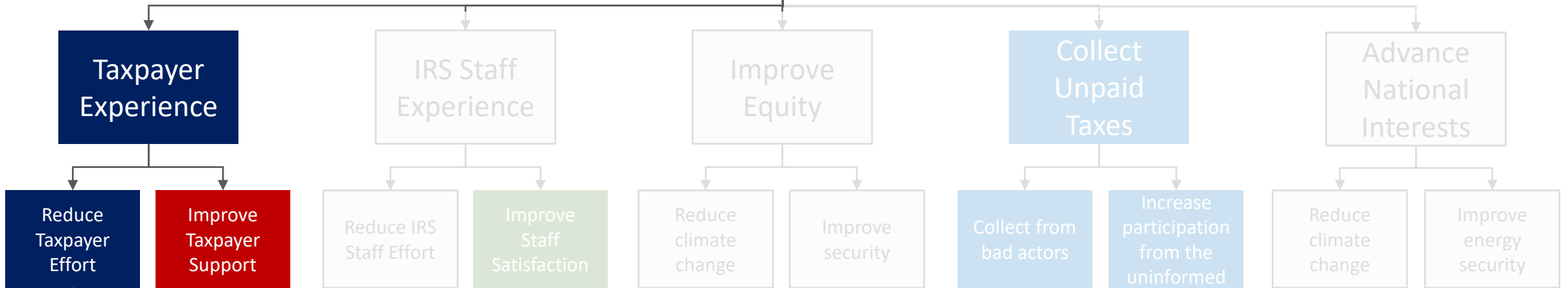




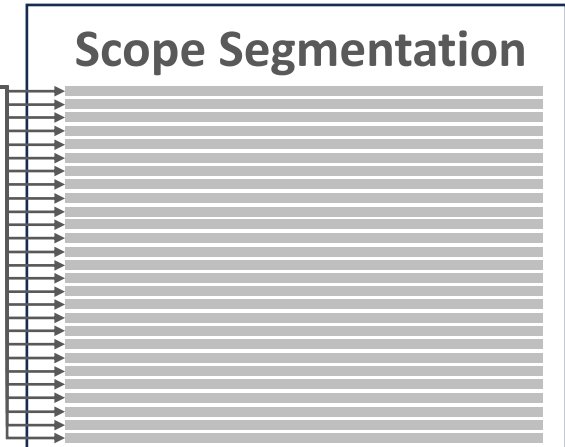
Do Less – Work Breakdown Methods

Create a simple, world-class user experience for taxpayers that effectively collects all taxes due, equitably, with minimal effort from taxpayers and IRS support staff

Outcome Hierarchy



- Quarterly reporting effort
- Annual filing effort
- Etc.



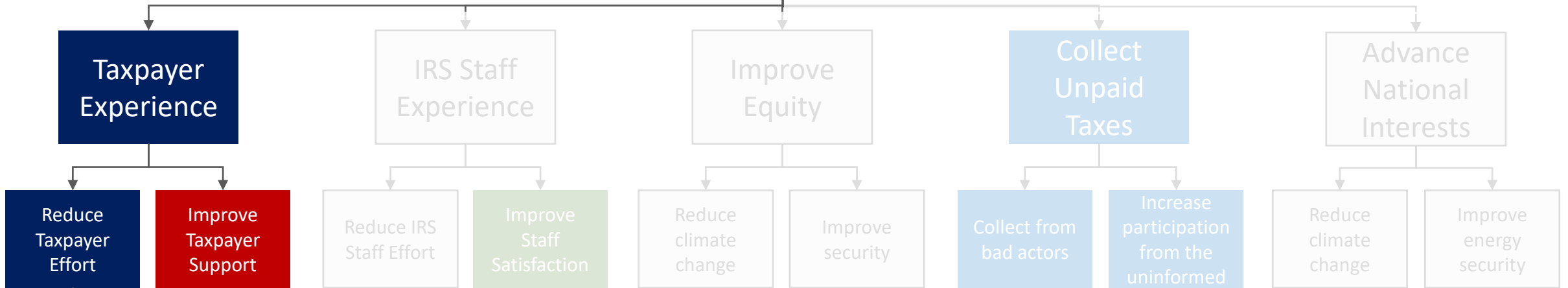
- Taxpayer conditions:**
- Income range
 - Employment
 - Identity verification



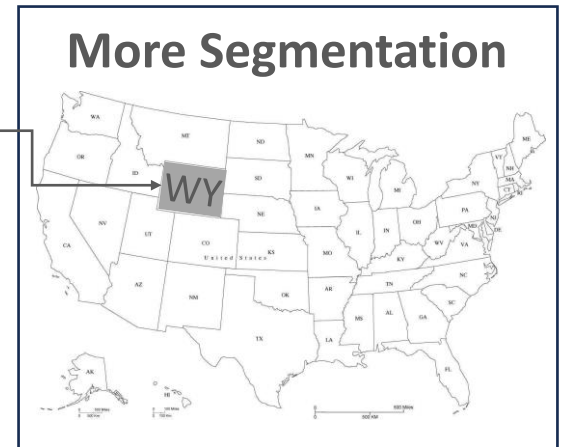
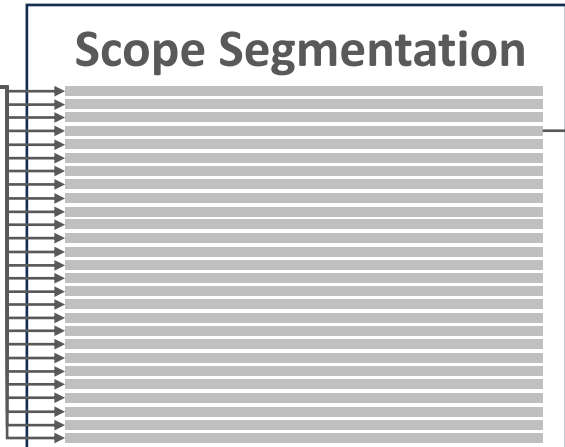
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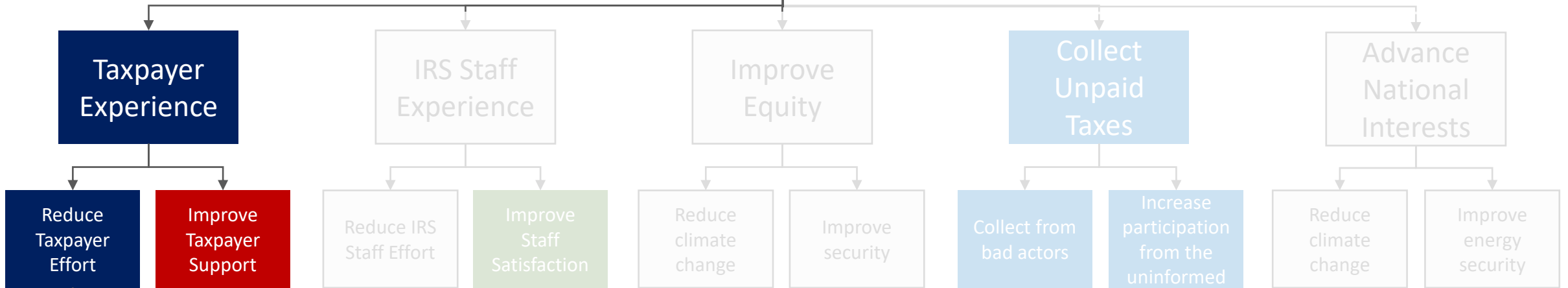
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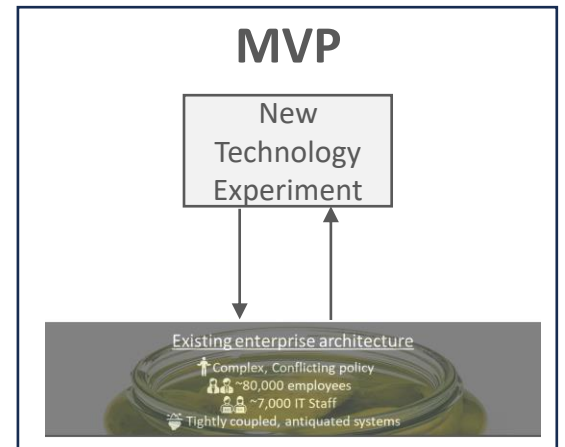
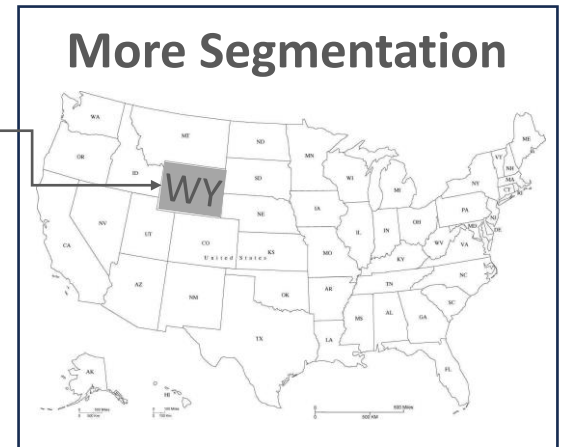
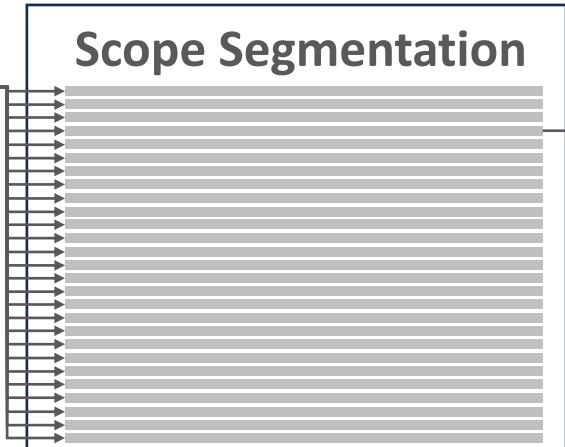
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Outcome Hierarchy



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- Etc.





Department of the Treasury
Internal Revenue Service

Step 1: Find a leader with authority
who can provide safety





Department of the Treasury
Internal Revenue Service

Step 2: Communicate a clear vision for the future



Create a simple, world-class user experience for taxpayers that effectively collects all taxes due, equitably, with minimal effort from taxpayers and IRS support staff

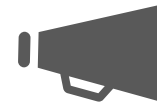


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Step 3: Define clear outcomes aligned with the vision



SAFETY

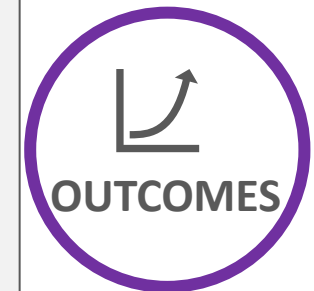


VISION

Create a simple, world-class user experience for taxpayers that effectively collects all taxes due, equitably, with minimal effort from taxpayers and IRS support staff



- Improve the taxpayer experience
- Improve IRS staff experience
- Increase tax burden equity
- Increase collection of unpaid taxes (\$500B Annually)
- Advance national interests



OUTCOMES



Department of the Treasury
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Step 4: Find the right people who can deliver the outcomes



SAFETY



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OUTCOMES





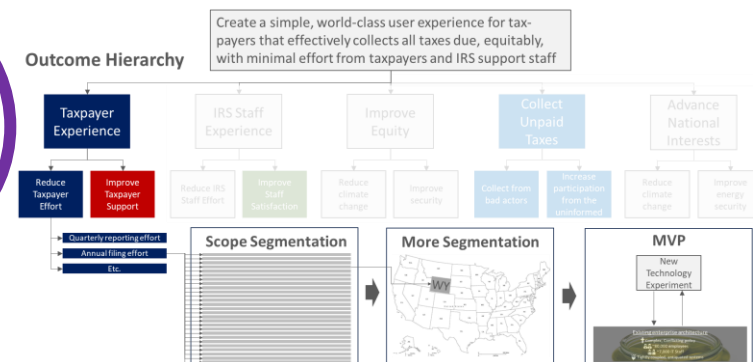
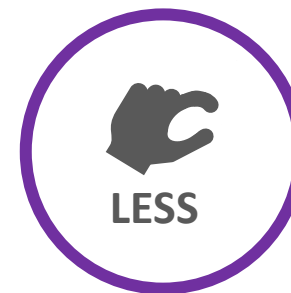
Department of the Treasury
Internal Revenue Service

Step 5: Identify a first solution experiment to run



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Step 6: Confirm success criteria



SAFETY



VISION

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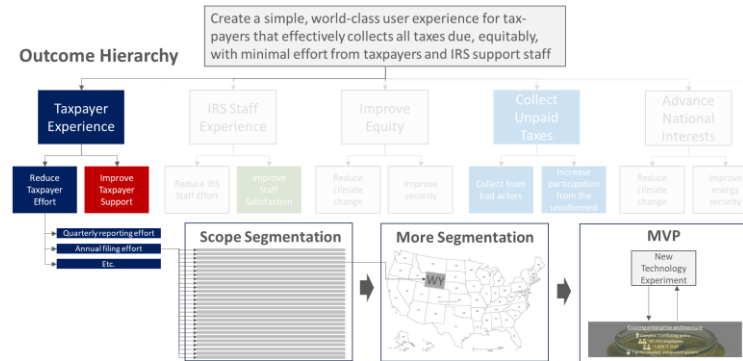
OUTCOMES



LESS



Department of the Treasury
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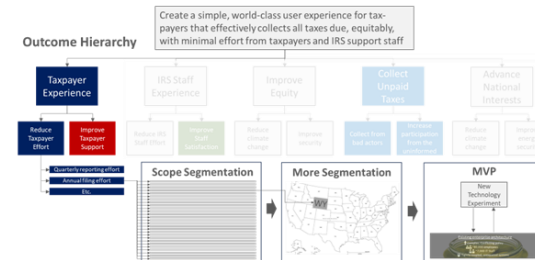
Step 7: Deliver the solution experiment as quickly as possible



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LESS



★★★★★
BETTER





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Internal Revenue Service

Step 8: Reflect on what needs to change to improve the result





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SAFETY



VISION



OUTCOMES



LESS



BETTER



TOGETHER



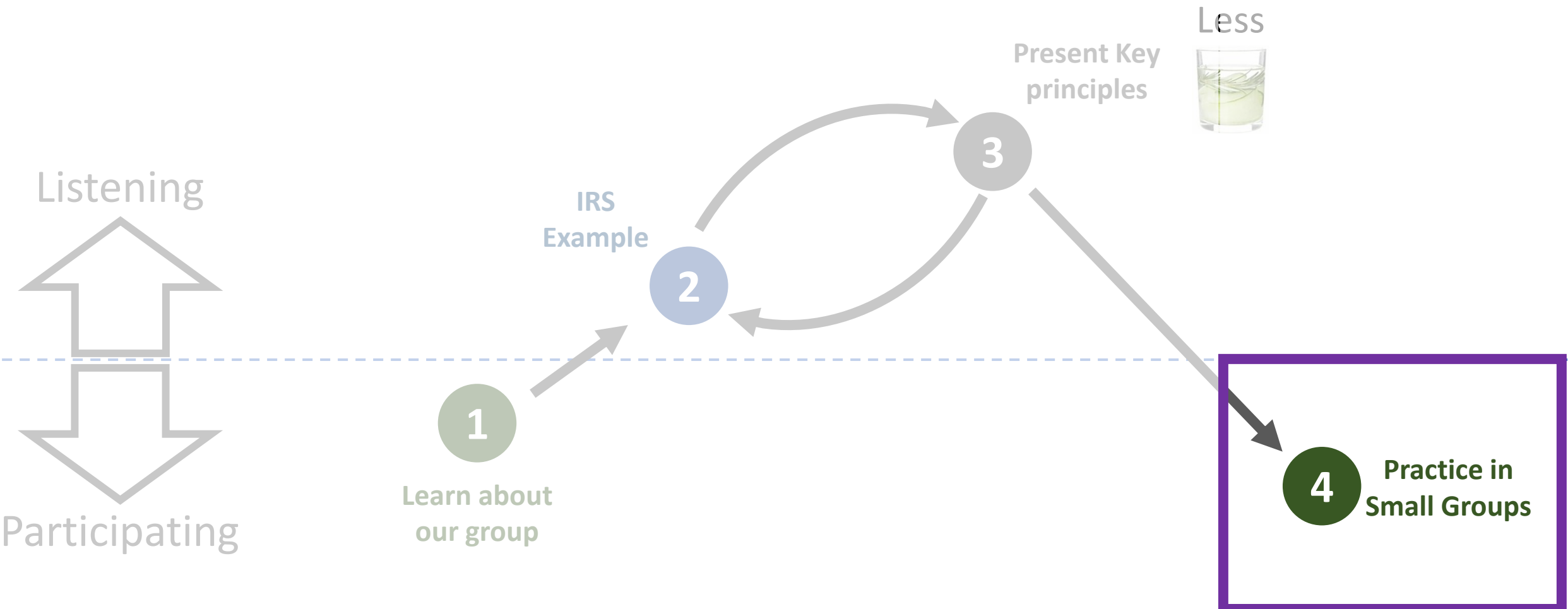
LEARN



SOONER



Presentation Flow



Small Group Exercise

With your table:

- Choose a strategic initiative or goal (from your table, the board, or other)
- Apply the principles from this presentation to your initiative
 - Develop a strategic vision (just cause)
 - List 2-3 key outcomes
 - Apply 1 or more of the work breakdown methods to identify a first “Less” item
 - Identify potential approaches for creating “cucumber water” teams
- Choose a speaker for your table to provide a quick summary