

Organizational Development Plan

This template provides a structured approach to assess your organization's current state, set clear goals and implement strategic initiatives.

With this framework, you can enhance communication, optimize processes, develop talent, and foster a culture of continuous improvement.



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Template and Frameworks

Organizational development is key to staying competitive and thriving in today's rapidly changing business landscape.

To help you navigate the journey toward growth and improvement, use this comprehensive Organizational Development Plan Template and Framework.

This template provides a structured approach to assess your organization's current state, set clear goals, and implement strategic initiatives. The framework allows you to enhance communication, optimize processes, develop talent, and foster a culture of continuous improvement. By aligning your efforts with the overall vision and mission of your organization, you can drive meaningful change and achieve sustainable success.

Let's get started.

First, fill out your organization's information:

- Organization name: _____
- Industry: _____
- Number of employees: _____
- Plan start date: _____
- Plan end date: _____

Next, follow these 11 steps:

1. Executive summary

Provide an overview of the key objectives, strategies, and goals of the organizational development plan.

- [Objective 1]
- [Objective 1]
- [Objective 3]

2. Organizational analysis

Complete a thorough analysis of the organization's current situation, including strengths, weaknesses, opportunities, and threats (SWOT analysis).

Strengths	Weaknesses	Opportunities	Threats
[Strength 1]	[Weakness 1]	[Opportunity 1]	[Threat 1]
[Strength 2]	[Weakness 2]	[Opportunity 2]	[Threat 2]
[Strength 3]	[Weakness 3]	[Opportunity 3]	[Threat 3]

3. Key performance indicators (KPIs):

Identify the primary KPIs that will be used to measure the success of the organizational development plan.

- KPI 1: [Description of KPI 1]
- KPI 2: [Description of KPI 2]
- KPI 3: [Description of KPI 3]

4. Organizational development goals:

List the main organizational development goals, aligned with the organizational analysis and KPIs. Use the SMART framework to make your goals specific, measurable, achievable, relevant, and time-bound.

Goal 1:

Goal 2:

Goal 3:

5. Strategies and Initiatives:

Outline the primary strategies and initiatives that will be implemented to achieve the organizational development goals. Include responsible parties, timelines, and resources required.

Goal	Strategy/initiative	Responsible party	Timeline	Resources needed
[Goal 1]	[Strategy 1]	[Party 1]	[Timeline 1]	[Resources 1]
[Goal 2]	[Strategy 2]	[Party 2]	[Timeline 2]	[Resources 2]
[Goal 3]	[Strategy 3]	[Party 3]	[Timeline 3]	[Resources 3]

6. Communication and stakeholder engagement:

Describe the communication plan and stakeholder engagement strategies for promoting and implementing the organizational development plan.

- Communication channels: [List of communication channels]
- Stakeholder engagement activities: [List of activities]

7. Monitoring and evaluation:

Explain the monitoring and evaluation process to assess the progress and impact of the organizational development plan.

- Monitoring process: [Description of monitoring process]
- Evaluation method: [Description of evaluation method]
- Review and reporting schedule: [Description of schedule]

8. Risk management:

Risk	Probability	Impact	Mitigation strategy	Contingency plan
[Risk 1]	[Probability 1]	[Impact 1]	[Mitigation strategy 1]	[Contingency plan 1]
[Risk 2]	[Probability 2]	[Impact 2]	[Mitigation strategy 2]	[Contingency plan 2]
[Risk 3]	[Probability 3]	[Impact 3]	[Mitigation strategy 3]	[Contingency plan 3]

9. Budget and resource allocation:

Provide an overview of the budget and resource allocation for implementing the organizational development plan.

Strategy/initiative	Estimated cost	Resource allocation	Funding source
[Strategy 1]	[Cost 1]	[Resource 1]	[Funding 1]
[Strategy 2]	[Cost 2]	[Resource 2]	[Funding 2]
[Strategy 3]	[Cost 3]	[Resource 3]	[Funding 3]

10. Implementation timeline:

Create a timeline for the implementation of the organizational development plan, including key milestones, deadlines, and responsible parties.

Milestone/task	Start date	End date	Responsible party	Status
[Milestone 1]	[Start date 1]	[End date 1]	[Party 1]	[Status 1]
[Milestone 2]	[Start date 2]	[End date 2]	[Party 2]	[Status 2]
[Milestone 3]	[Start date 3]	[End date 3]	[Party 3]	[Status 3]

11. Plan review and updates:

Describe the process for reviewing and updating the organizational development plan, including the frequency of reviews and the roles and responsibilities of those involved.

- Review frequency: [e.g., quarterly, semi-annually, annually]
- Roles and responsibilities: [List of involved parties and their responsibilities]

This organizational development plan template provides a comprehensive structure for planning and implementing your organization's development initiatives. You can customize the template to suit your organization's specific needs and objectives.

Frameworks for organizational development planning & design

Here are ten different frameworks for organizational development planning & design.

Each model offers a unique perspective and approach to organizational development, addressing various aspects of organizational performance, structure, culture, and change management.

How to use the models:

Each model is presented as a fillable template, allowing you to apply the framework directly to your organization. For each element or stage of the model, you'll identify the current state, the desired state, and the actions or interventions needed to bridge the gap. This process helps you to create a tailored development plan that addresses your organization's specific needs and objectives. Remember, these models are tools to guide your thinking and planning—feel free to adapt them as necessary to fit your organization's unique context and goals.

1. Burke-Litwin Model of Organizational Performance and Change

The Burke-Litwin Model provides a comprehensive approach to organizational change. It identifies twelve key factors, including external environment, mission and strategy, leadership, and organizational culture, that influence change within an organization. The model suggests that changes in the external environment are the most powerful drivers of change within an organization.

Application: Use this model to understand the different factors that drive change in your organization and to plan strategic interventions that address these factors.

Factors	Current state	Desired state	Actions/interventions
External environment			
Mission and strategy			
Leadership			
Organizational culture			
Structure			
Management practices			
Work unit climate			
Task and individual skills			
Individual needs and values			
Motivation			
Individual and organizational performance			

2. Weisbord's Six-Box Model

Weisbord's Six-Box Model is a diagnostic tool for organizational development. It focuses on six key areas: purposes, structure, relationships, leadership, rewards, and helpful mechanisms, to assess the effectiveness of an organization.

Application: This model can be used to identify areas of strength and weakness within your organization and to guide the development of strategies for improvement.

Category	Current state	Desired state	Actions/interventions
Purposes			
Structure			
Relationships			
Leadership			
Rewards			
Helpful Mechanisms			

3. McKinsey 7S Framework

The McKinsey 7S Framework is a management model that considers seven key internal elements: strategy, structure, systems, shared values, skills, style, and staff, to ensure that the organization is achieving its objectives.

Application: Use this framework to analyze your organization's current state and to plan changes that will align all elements of the organization with your strategic goals.

Element	Current state	Desired state	Actions/interventions
Strategy			
Structure			
Systems			
Shared Values			
Skills			
Style			
Staff			

4. Tuckman's Stages of Group Development

Tuckman's model describes the four stages (forming, storming, norming, and performing) that teams typically go through as they develop, and a fifth stage (adjourning) for when the team disbands.

Application: This model can be used to understand and manage the dynamics of team development within your organization.

Stage	Description of current state	Actions/interventions
Forming		
Storming		
Norming		
Performing		
Adjourning		

5. Kotter's 8-Step Change Model

Kotter's 8-Step Change Model provides a step-by-step approach to managing organizational change, from creating a sense of urgency to anchoring the changes in the corporate culture.

Application: Use this model to guide your organization through a process of significant change.

Step	Description of current state	Actions/interventions
Create urgency		
Form a powerful coalition		
Create a vision		
Communicate the vision		
Remove obstacles		
Create short-term wins		
Build on the change		
Anchor the changes in corporate culture		

6. ADKAR Model

The ADKAR Model is a goal-oriented change management model that allows change management teams to focus their activities on specific business results. The model consists of five stages: awareness, desire, knowledge, ability, and reinforcement.

Application: This model can be used to support individuals through the change process, ensuring that they are ready, willing, and able to play their part in organizational change.

Stage	Description of current state	Actions/interventions
Awareness		
Desire		
Knowledge		
Ability		
Reinforcement		

7. Baldrige Performance Excellence Framework

The Baldrige Framework is a comprehensive performance excellence program that assesses an organization across seven areas: leadership, strategy, customers, measurement, analysis, and knowledge management, workforce, operations, and results.

Application: Use this framework to assess your organization's performance and to identify areas for improvement.

Criteria	Current state	Desired state	Actions/interventions
Leadership			
Strategy			
Customers			
Measurement, analysis, and knowledge management			
Workforce			
Operations			
Results			

8. Lewin's Change Management Model

Lewin's Model simplifies the process of organizational change into three stages: unfreeze (preparing the organization for change), change (implementing the change), and refreeze (making the change a permanent part of the organization's processes).

Application: This model can be used to guide your organization through a process of change, ensuring that the change is effectively implemented and sustained.

Stage	Description of current state	Actions/interventions
Unfreeze		
Change		
Refreeze		

9. Nadler-Tushman Congruence Model

The Nadler-Tushman Congruence Model is a comprehensive diagnostic tool for understanding the performance of organizations. It considers four components: work, people, formal organization, and informal organization.

Application: Use this model to analyze the congruence or fit between various aspects of your organization, and to identify areas of misalignment that may be affecting performance.

Component	Current state	Desired state	Actions/interventions
Work			
People			
Formal organization			
Informal organization			

10. The Five Dysfunctions of a Team Model

This model identifies five common issues that can hinder team performance: absence of trust, fear of conflict, lack of commitment, avoidance of accountability, and inattention to results.

Application: Use this model to diagnose problems within your teams, and to develop strategies for improving team performance.

Dysfunction	Description of current state	Actions/interventions
Absence of trust		
Fear of conflict		
Lack of commitment		
Avoidance of accountability		
Inattention to results		

These fillable templates can help you apply each of the ten organizational development frameworks to your organization. Customize them to suit your organization's specific needs and objectives.

Now, you have a roadmap to optimize your organization's growth and development.