

# Organizational Surfing - from Business Troubleshooting to Business Integration

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— Review of —  
**Integrative  
Business &  
Economics**  
— Research —

## ABSTRACT

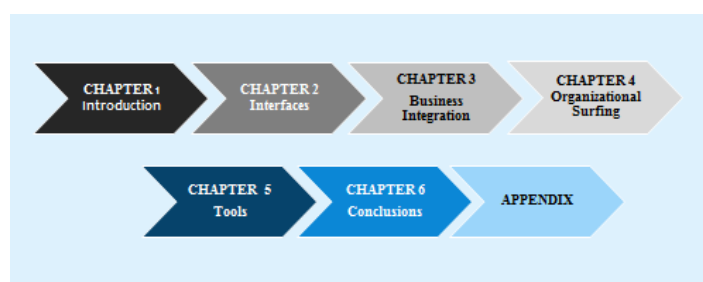
This paper offers support for the management of Organizational Interfaces in complex, multidimensional companies by means of a new activity: Organizational Surfing. The troubleshooting of issues concerning the integration, agility, power, efficient execution and work optimization at the interface level is the task of a new professional: the Organizational Surfer (OS). The required personal and professional skills, abilities and behaviors that a manager should acquire and develop in order to successfully play the OS role are detailed here. Also, the paper includes two management tools to be used for approaching processes and relationships at the organizational interfaces and addressing the respective issues and gaps in a structured, effective manner. The ultimate goal of the Organizational Surfing is to facilitate a better control of Business Integration and, consequently, a better control over the business's future. The optimization of the business process as a whole and the business results at the Organizational Interfaces can be achieved by applying this new concept of business, Organizational Surfing and its associated professional role.

*Keywords:* Organizational Surfing, Business Integration.

## 1. INTRODUCTION

### 1.1. Paper Path

*We are going to follow a path that covers following main areas: Interfaces, Business Integration and the new proposed concept of Organizational Surfing.*



**Figure 1** Paper path

### 1.2. End-Users and Applications Areas

The paper is addressed to middle and senior managers, that deal with the complexity of the interfaces and have to solve the issues specific to these areas in order to improve performance and achieve the targets.

If you have:

- to build and manage a new department in a multidimensional organization, you need to solve the issues at the intersection with other departments in order to create the most efficient organizational entity.

- to plan and implement a new strategy in your company, the way you build the handover cells in your company's process and how you define the joint responsibility in the organizational nodes drives the fluidity in the whole activities chain, and ultimately, the success of your business strategy.

The present considerations and tools may assist you in these tasks. Regardless your position as a manager, a structured approach over the organizational interfaces creates an important benefit for both the individual and the organization.

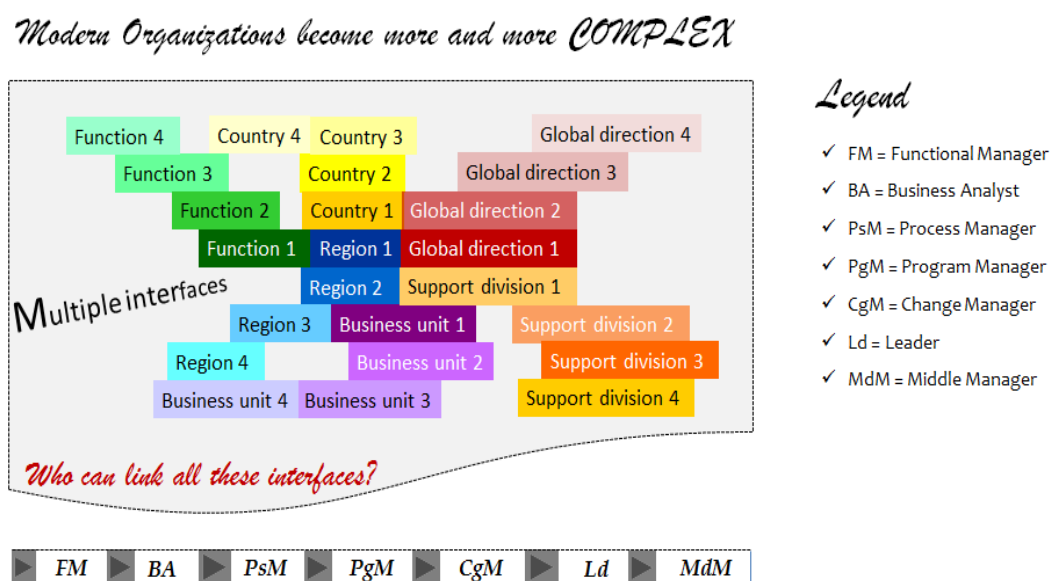
## 2. ORGANIZATIONAL INTERFACES

### 2.1. The Management Challenge

Many today's enterprises need to do business across borders, having employees, vendors or customers in different countries. They have to adapt their organization to the challenges of global collaboration, such as cultural difference, language barriers and geographical distance. These difficulties are adding complexity to the usual organizational barriers between functions and between business units.

### 2.2. Modern Organizations

This is a representation of a modern organization. There are a lot of interfaces in this organization: cross-country, cross-region, cross-function, cross-business unit, etc.



**Figure 2** Multidimensional Organizations and Organizational Interfaces

### 2.3. What are the Organizational Interfaces?

The Organizational Interfaces (OIs) are elements of the organization's configuration where handover activities are developed that assure an advance of our project, product or/and process from one stage to another along the entire transformation chain. These

are like borders and often marked by a specific milestone, where the results from the previous stage are checked before passing to the next stage.

#### *2.4. Organizational agility, power and efficient execution are tested at Interfaces*

Organizational Interfaces are micro-mirrors that show the power/agility balance ratio of the organization and who is controlling the balance of power in the work chain as well.

They help us to understand if:

- the organization is agile enough to control the directions and priorities at interface level,
- we are so agile that we can cover all the directions of action, being instantaneously oriented to the best course of action,
- our designed process has the same degree of agility as the organization structure.

The Organizational Interfaces are the most sensitive elements in the business chain, carrying on in their structure the DNA of success or failure of Business Integration within the organization. How the parts of the organization match together, providing a smooth functioning of the whole, depends on the ability of the professionals involved in activities at the interface level.

### **3. BUSINESS INTEGRATION**

#### *3.1. What means Business Integration?*

Business Integration means that our processes and functions are working together seamlessly. It is ultimately a matter of scaling the results on interfaces and depends on the way the managers are mastering the processes, relationships and solutions implementation at the level of these transfer cells. Also Business Integration means a keen understanding of business strategy and mastering the strategy execution as a whole. The success of the business depends on how the goals, roles and activities are integrated over the entire business.

#### *3.2. Signs of Business Integration*

Let's start with a question:

Is our organization controlling the interfaces between domains?

- If integration exists, we do not see it. The company processes run smoothly.
- If integration is missing, misunderstood or misapplied, we will be able to see that processes in our company are stressed, overlapped or generating adverse side effects wasting the company's energy and reducing its competitiveness. Also, we can discover unassigned activities, that are not performed or delayed because of unclear definition of handover responsibilities.

#### *3.3. The False Integration*

The people and processes in a Multidimensional Organization can be subject to false integration. This reveals itself as:

- Forced integration: "black holes" that absorb resources from all over the organization and negatively interfere with other activities, goals, etc.
- Naive integration: voluntary performance of tasks out of one's responsibility

in place of other people.  
The result of both these false integrations is the inefficient execution.

### 3.4. *Who is the Business Integrator in our organization?*

There are several stakeholders in the chain of organizational interfaces that can influence the course of action during the business activity: from Business Analyst to Functional Manager, Process Manager, Program Manager, Change Manager or company's COO, all these managers would play a role in Business Integration. However, which of them could cover the entire chain, being able to connect a cross-country structure with a cross-function structure in action?

### 3.5. *Professional Requirements for a Business Integrator*

We are looking for a professional with following characteristics:

- management practitioner with high ability to manage business relationships top and down
- expert in strategy and knowing well the business processes
- solid background in organizational behavior (individuals & groups)
- multicultural formation
- excellent communicator

### 3.6. *Why currently existing functions do not fit the Business Integrator role?*

Business Analyst	is not a practitioner, an implementer.
Functional Manager	is not a simultaneous process player and not agile enough.
Process Manager	doesn't connect people and his view is not broad enough.
Program Manager	doesn't have the required level of power and relationships in the overall matrix organization.
Change Manager	is not an insider of the transformation team (general case).
Chief Operating Officer	is not at the level of working interfaces (placed too high in organization).

## 4. ORGANIZATIONAL SURFING

### 4.1. *Organizational Surfing, a solution for Business Integration*

This chapter presents an alternative to the classic "Business Integrator" roles on the market: a new professional role called "Organizational Surfer" (OS).

OS is part of a broader concept, Organizational Surfing, that includes also a specific Body of Knowledge (see "Appendix") and the related Tools (see "Chapter 5").

Organizational Surfing means the application of professional abilities, tools, knowledge and techniques for solving issues and optimizing activities developed at the Organizational Interfaces of a business entity.

Organizational Surfing is not a matter of exerting power, but an agile implementation of solutions at interface level. It means playing a multi-role in processes, connecting directions and people, being simultaneously involved in strategy and action, being up and down... like a Surfer that is permanently changing its perspective.

#### 4.2. Organizational Surfer definition

The Organizational Surfer is a professional with a simultaneous view over more domains/levels of organization. OS has the skills and ability to understand and influence these domains on multiple directions (i.e., bottom, up, and at the same level)

#### 4.3. What distinguishes the Organizational Surfer from other organizational roles?

Compared with aforementioned roles, the OS has three main characteristics:

- Simultaneous process player
- Key connector of directions & people
- Agile implementer of solutions

Required Professional Abilities	OS
Top & Down influencing skills	X
Business Analysis skills	X
Active in more domains or levels (insider)	X
Simultaneous processes player	X
Key connector of directions & people	X
Agile implementer of solutions	X

**Table 1** OS business profile

- Simultaneous process player  
OS is an active player in the processes involved at the interface level. He "controls the game" by knowing very good the rules and the persons in charge, but also by being a great improviser in new or critical situations.

- Valuable interface connector  
As multidimensional organization player, OS can use his influence to connect domains or involve powerful stakeholder from one dimension to support initiatives taken by another dimension of the organization.

- Agile implementer of solutions  
Since OS is permanently changing his perspective, he adds dynamism in the domains where he is involved. He can benchmark the best solutions cross-domains, strengthen relationships and transfer knowledge across teams.

## 5. TOOLS

### 5.1. Tools overview

Depending on its professional maturity level, the Organizational Surfer can use various tools to support him in the management activity. This study presents two tools : Organizational Surfing Paddle (OSP) and Strategic Value Streams (SVS), each of them dedicated to different users and purpose, but having the same explanation structure:

- Premise
- Tool description (overview, structure and template)
- Using the tool
- Application summary

### 5.2. Organizational Surfing Paddle (OSP)

#### 5.2.1 Premise: OS builds a new department in a multidimensional organization

Building a new department in an organization is stressing the current balance of power. However, if the manager of the new department is a multi-role player in the organization, he can sustain this initiative from a better position. It is not only a matter of extended relationships within the organization, but also the advantage of being more knowledgeable in overall processes, people and domains. OS can use this knowledge for smooth building and integration of the new department in organization. The occurred issues at the new organizational interfaces generated by the added department have to be correctly understood and addressed by using a specialized tool for root causes identification.

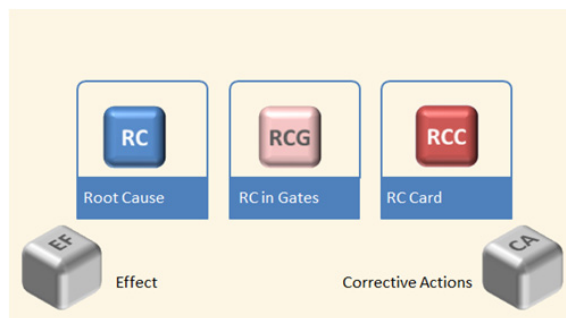
### 5.2.2 Tool description

OSP is used for solving complex business issues by determining their root causes (RC) classified on relevant business categories according to a Strategic Execution Framework<sup>1</sup> [2]. These business categories are plotted in a cause-and-effect Fishbone diagram [3], where the secondary cause level is related to the specific issue.

The root causes are prioritized and corrective actions are decided and applied.

For the most frequent issues, Root Cause Cards are issued to be associated to OSP as useful memos (illustrated lessons learned).

The OSP tool is used for problem solving and it is dedicated to Organizational Surfers working as middle managers. For overview, structure & template see Fig.3,4 & 5.



**Figure 3:** OSP overview

<sup>1</sup> Strategic Execution Framework (SEF) is a Business Model developed by the Stanford University California, as a foundation framework for its Curriculum in the Stanford Advanced Project Management Program (SAPM)

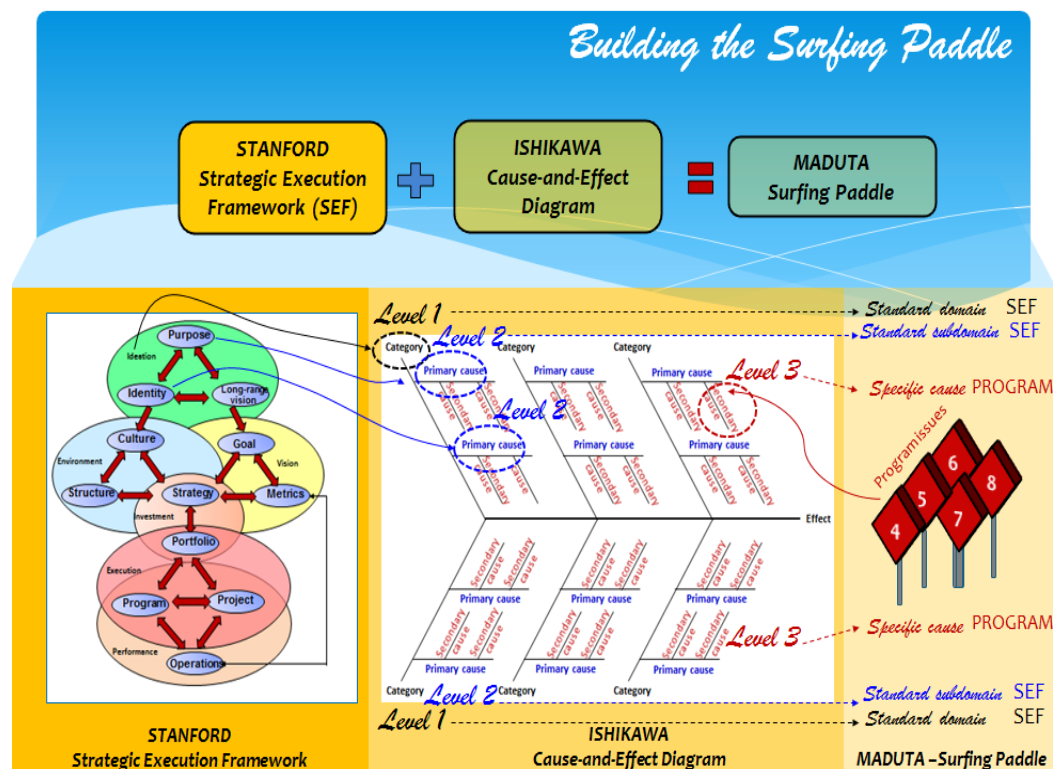


Figure 4 OSP structure

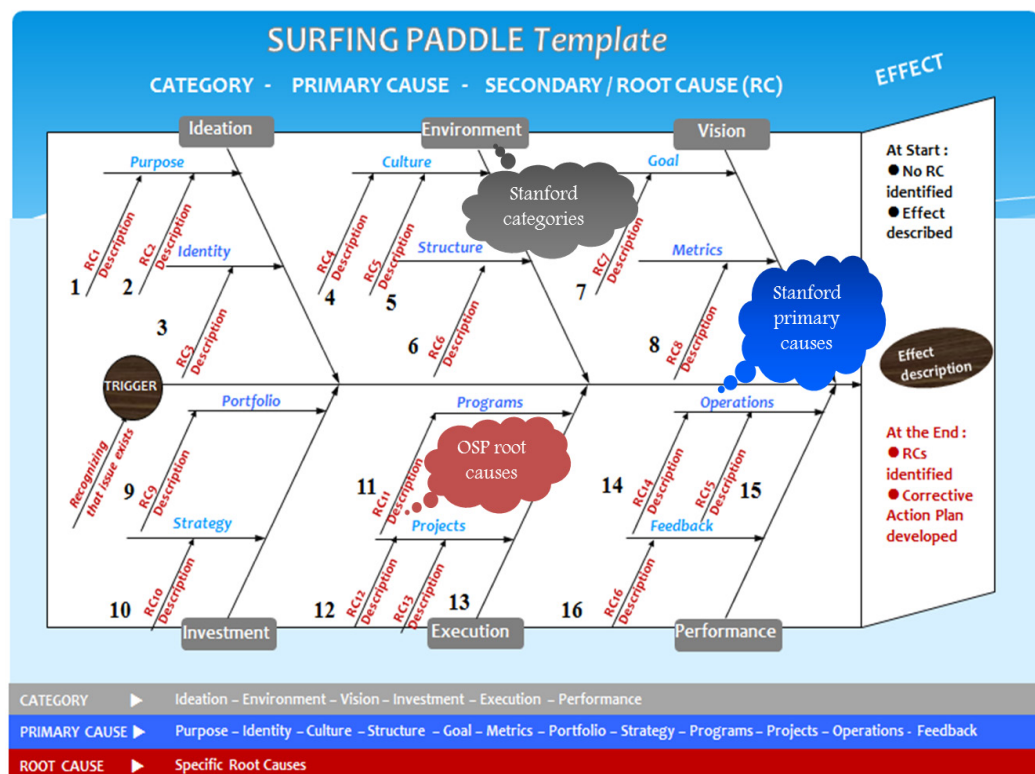


Figure 5 OSP template



### 5.2.3 Using the tool

#### a) Mapping the causes from effect

Effect	Cause Domain (SEF)	Cause Subdomain (SEF)	Cause Element (Root cause)	RC Nr.
Ineffective execution	Ideation	Purpose	Values not shared	RC1
			Stakeholder not engaged	RC2
		Identity	Identity not defined	RC3
	Environment	Culture	Power & Influence unbalanced	RC4
			Department age difference	RC5
		Structure	Responsibilities not defined	RC6
	Vision	Goal	Objectives misalignment	RC7
		Metrics	Key Performance Index undefined	RC8
	Investment	Portfolio	No decision for priorities	RC9
		Strategy	Strategy not disseminated	RC10
	Execution	Programs	Communication issue	RC11
		Projects	Planning not integrated	RC12
			Risks & Changes not controlled	RC13
	Performance	Operations	Process undefined, incomplete, wrong	RC14
			Process & Structure misaligned	RC15
		Feedback	Knowledge not shared	RC16

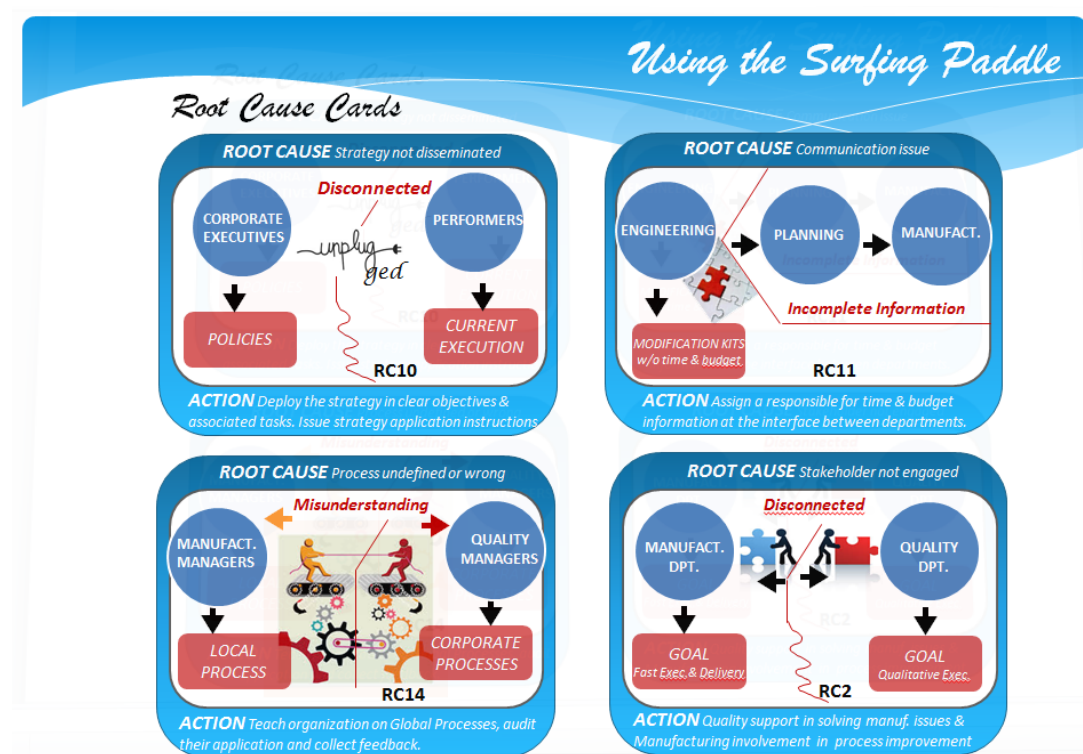
**Table 2** OSP Root Causes

#### b) The Paddle on gates

Repeat the mapping of root causes on relevant gates of the program, project or operation activity, for example in initiation, planning and monitoring phase.

#### c) Root Cause Cards

Use visual additional tools to plot the root causes of the most relevant/ frequent issues associated to your business activity in a defined period of time. The model includes 4 Root Cause Cards, but other cards can be designed as needed to facilitate the process of acknowledgment and solving the issues according to their priority.



**Figure 6** Examples of Root Cause Cards



#### d) Corrective Actions

The corrective actions proposed for solving the root causes can be part of the Root Cause Cards, forming a database for future use in the business.

#### 5.2.4 Application summary

THE TOOL	Organizational Surfing Paddle
USER	Organizational Surfer working as Middle Manager
USER PROFILE	Troubleshooter
BUSINESS DOMAIN	Organizational Interfaces
APPLICATION AREA	Complex business issues
TOOL PURPOSE	Problem Solving
TOOL LEVEL	Intermediate
TOOL APPROACH	Corrective
TOOL BENEFITS	The Surfing Paddle helps to organize on relevant business categories the root causes of the Business issues, facilitating the prioritization of actions and Business Success.
TOOL BOUNDARIES	The Achilles' heel of the model is the recognition that an issue exist. There are two main constraints that can hinder a team to properly use this template: "the undetected conflict" and "us-versus-them mentality".

**Table 3** OSP application summary

### 5.3. Strategic Value Streams (SVS)

#### 5.3.1 Premise: OS defines and implements a company strategy based on value

The way a company executes its strategy assures the company's success. Changing the point of view of various stakeholders in the process from "Issue-solver" to "Value-adder" is one of the biggest challenge of modern complex organizations. Consequently, the interfaces in these organizations can be looked instead as "summary of issues" as "pool of values" generated by the participants at the interface activity. The SVS tool is used for implementing strategies considering the organizational interfaces and value-adding business activities.

#### 5.3.2 Tool description

SVS is sourced from Value Stream Mapping<sup>2</sup> [4]. The Tool offers a progressive split of the company's mission in 4 levels: 1) Mission 2) Strategic Objectives 3) Strategic Elements 4) Value-Adding Activities. These activities are merged in Strategic Value Streams, facilitating the focus of management teams on strategic objectives during execution. The template tool refers to a strategy called "Twin Efficiency Triangles" shaped on:

- Cost-Time-Quality (primary triangle) and
- Scope-Process-Responsibility (secondary triangle)

The SVS tool is targeted at Organizational Surfers, middle or senior managers working in strategy implementation. For overview, structure & template see Fig.7,8,9.

<sup>2</sup> Value Stream Mapping is a lean-management method for analyzing the current state and designing a future state for a series of events that take a product from definition to customer. At Toyota, it is known as "material and information flow mapping".



Figure 7 SVS overview

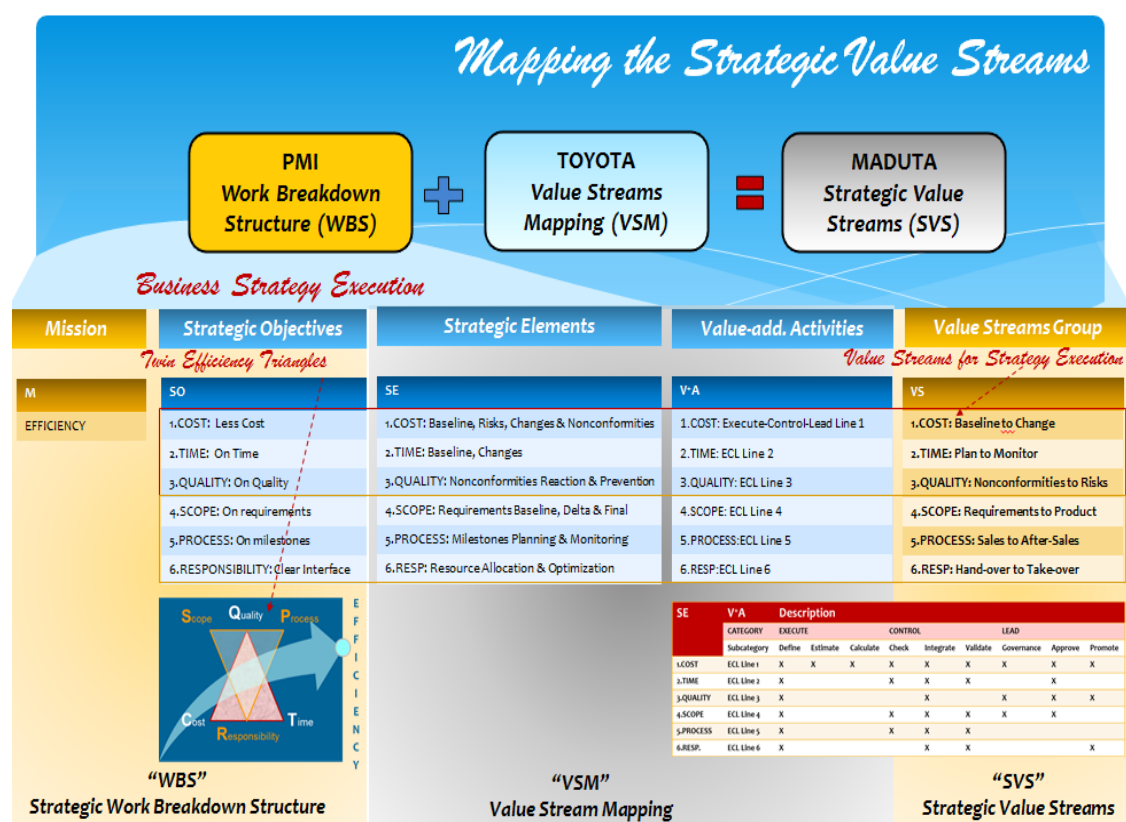


Figure 8 SVS structure

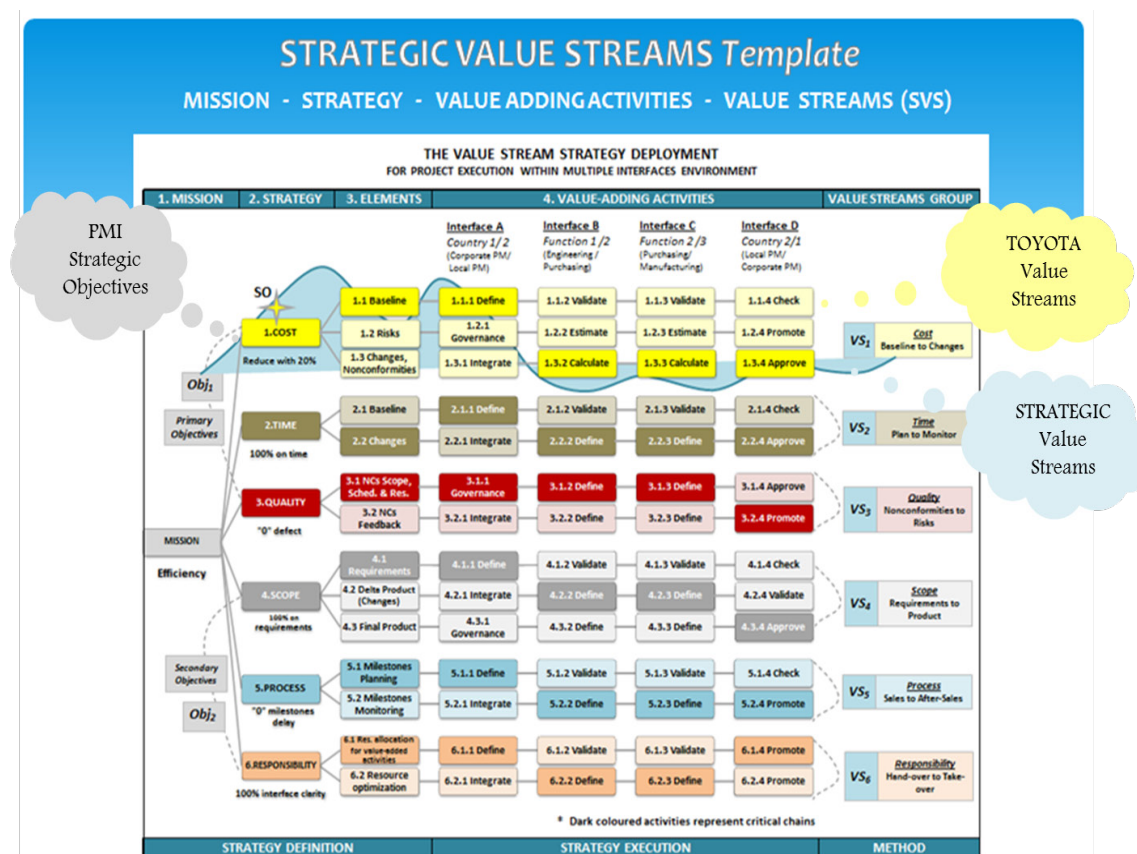


Figure 9 SVS template

## 5.3.3 Using the tool

a) Design the Strategic Model and establish its Objectives starting from Mission  
Considering "efficiency in execution" as the current mission of a company, we can design a strategic model that is based on 3+3 strategic objectives: Cost, Time, Quality (as primary objectives) and Scope, Process, Responsibility (as secondary objectives).

b) Split the Strategic Objectives in critical Strategic Elements

Each strategic objective is split further in critical strategic elements, respectively in work categories, that create value for the strategic objectives they are connected with<sup>3</sup> [1].

c) Breakdown Strategic Elements in Value-Adding Activities and identify the Strategic Value Streams (SVS)

Breaking down the strategic elements in relevant activities supports the achievement of the strategic objectives at tactical level during projects execution.

By assigning value-adding activities to the strategic elements, are created horizontal strategic value streams that can benefit from dedicated management.

<sup>3</sup> The Value-Added-Activities are similar to the capabilities required for the future state of the business in David King's framework about Business Activity Models

d) Mark Critical Chains in SVS and execute the Strategy accordingly  
On each Strategic Value Stream we identify the critical activities, and draw the critical chain, facilitating our focus on activities with major strategic contribution.

### 5.3.4 Application summary

THE TOOL	Strategic Value Streams
USER	Organizational Surfer, middle and senior manager, working in Strategy implementation
USER PROFILE	Strategic Implementer
BUSINESS DOMAIN	Organizational Interfaces
APPLICATION AREA	Business Strategy
TOOL PURPOSE	Strategy Execution
TOOL LEVEL	Advanced
TOOL APPROACH	Development
TOOL BENEFITS	The Strategic Value Streams Framework is a developed tool that breaks down the Business Strategy in Value Streams, managed by Value Streams Coordinators, that guarantee the focused Strategic Execution of Business Activity.
TOOL BOUNDARIES	Establishing too many Value Streams for a Strategy Execution can dissipate the energy of the Implementation Coordinator & Teams. Where possible should be evaluated the alternative of a single Value Streams Coordinator, i.e. the Portfolio Manager, supported by a single Implementation Team.

**Table 4** SVS Application summary

### 5.4. Comparison between OSP and SVS tools

If the Organizational Surfing Paddle is a problem solving tool working with high level categories of Ideation-Environment-Vision-Investment-Execution-Performance, the Strategic Value Streams tool is more close to applied strategic execution, working with categories specific to Project Management like Cost, Time, Quality, Scope. The tools have also a difference of focus: OSP being focused on gaps, while the SVS is focused on value-adding activities.

## 6. CONCLUSIONS

Evolving from Business Troubleshooter to Strategic Implementer is not an easy journey, neither for a manager working in a mono-dimensional organization, nor for an "Organizational Surfer", which, due to its activity at business interfaces, is supposed to be better prepared to manage changes for itself and for the organization. But being highly involved in improving the business and having the right tools at disposal, the Organizational Surfer can be a valuable contributor to the success of the business he is working for in a multidimensional organization.

## APPENDIX

### A1. Definitions and Principles of Organizational Surfing

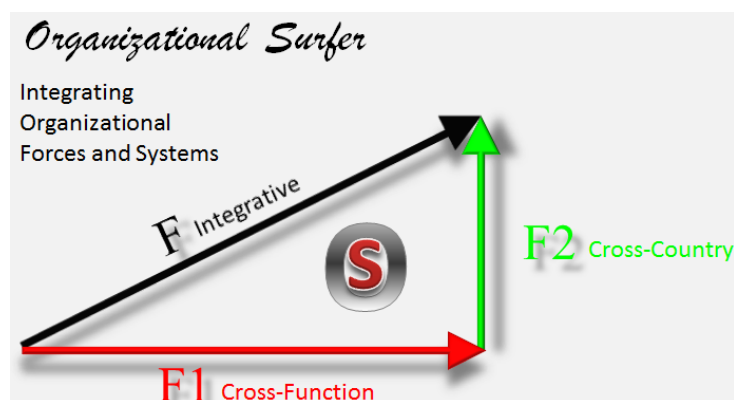
#### 1. *Act on more than one Dimensions of the Organization*

Organizational Surfing means being involved in business activity on at least two dimensions of organization. Depending on the complexity of the business, these dimensions can be, i.e.:

- a) Cross-function    b) Cross-country    c) Cross-business unit

#### 2. *Integrate Organizational Forces and Systems*

The key role of the Organizational Surfer is to integrate the organizational forces and systems of different business dimensions. None of the business dimensions can be effective without considering the rest of the business. The Organizational Surfer is a Promoter of Common Goals; he unifies different interests in the highest common interest of business success. He harmonizes the differences of professional groups mentalities and promotes the multidimensional collaboration.



**Figure 10** Principle 1 – Act on more dimensions of Organization

#### 3. *Control and develop the Organizational Interfaces*

The Organizational Surfer acts as an Interface Controller, discovering and giving solutions for process gaps, signaling undefined or overlapping roles, and all kind of issues at interfaces that can hinder the mechanism of organization to run smoothly.

He also facilitates the development of the Organizational Interfaces, by:

- a) Strengthening the interface relationships
- b) Encouraging the transfer of knowledge
- c) Promoting success solutions
- d) Spreading lessons learned

#### 4. *Sustain the dynamical Integration over time*

A surfer needs training to catch the next wave. Integration like surfing needs exercise. It can not be done overnight and without considering the company as a whole.

Moreover, it is a measure of organization maturity and there is no magic and no revolution that brings an organization instantaneously to a higher level of integration.

Organizational Surfing means more than an isolated momentum, is a sustained<sup>4</sup> momentum over time.

## A2. Organizational Surfing Body of Knowledge (BOK)

This Chapter includes a basic BOK related to Multidimensional Organizations and Organizational Surfing. Other definitions can be found inside the paper.

TERM	DEFINITION	<i>Organizational Surfer Skills</i>
Multidimensional Organization	An organization with multiple business interfaces	<ul style="list-style-type: none"> <li>✓ management practitioner</li> <li>✓ high ability to manage business relationships top &amp; down</li> <li>✓ expert in business strategy, structure &amp; processes</li> <li>✓ solid background in organizational behavior</li> <li>✓ multicultural formation</li> <li>✓ excellent communicator</li> <li>✓ able to transmit trust &amp; enthusiasm</li> <li>✓ able to promote changes keeping best direction for success</li> <li>✓ creative, finding new solutions &amp; opening new ways</li> </ul>
Multi-Role-Player	Professional individual that plays at least two different roles in organization at different levels or in different business lines	
Organizational Surfer (OS)	A person with skills and ability to understand and influence the organization hierarchy of supervisors, peers & direct reports	

**Table 5** BOK – Multidimensional Organization

TERM	DEFINITION	<i>Organizational Surfing Techniques</i>
Organizational Waves	Various undulating motions in organization able to change structure, opinions or emotions.	<ul style="list-style-type: none"> <li>✓ Deal with Counterwaves</li> <li>✓ Paddling to the Peak</li> <li>✓ Power Surfing</li> <li>✓ Increase your Wave Count</li> <li>✓ Catching the next Wave</li> </ul>
Counterwave	A wave going against an earlier wave: conflict of interests, difference of opinions, etc.	
Paddling to the Peak	Peak is the immediately breaking part of the wave. Aiming high to obtain performance.	

<sup>4</sup> First goal of sustainability is to maintain the level of integration. This should be the result of the common effort of all the involved stakeholder, a right process in place and clear defined responsibilities. Second goal is to develop the integration on a higher level.



Power Surfing	Surfing/Leading with force and commitment. Confronting big organizational waves.
Increase your Wave Count	Being more time on organizational waves, dealing with people and issues, increasing your leadership ability. The more you catch, the more you surf, the more you improve.
Catching the next Wave	Positioning for the future, for innovation, being open to new ideas.

**Table 6** BOK – Organizational Surfing

### ACKNOWLEDGEMENTS

This paper has its roots in the knowledge acquired during the 1 ½ year of Advanced Project Management through the SAPM program organized by Stanford University and IPS Learning, California. My special thanks to the directors of this program, Prof. Raymond Levitt and Tim Wasserman, that create a great curriculum supporting us to advance from tactic to strategic Project Management.

I also would like to thank to my employer company, Comau SpA, for the opportunity they gave me to work for several years in the Corporate Project Management Office. Working in a dynamic multinational team and participating to strategic initiatives allowed me to observe, learn and practice a multidimensional organizational culture and to apply my ideas in concrete situations. I want to thank especially to Comau's Vice president for Contract and Project Management, Roberto Guida, for the way he encouraged our global work and culture in organization.

I only can hope the professional profile and the described tools will inspire other complex organizations to approach the organizational interfaces in a different way than before. Thank you very much!

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