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# Is Your Team Truly Aligned?

by Laura Stone

In today's constantly changing business environment, work that was valued and applicable just six months ago may no longer be the right focus for driving results today. Business needs and demands evolve constantly, causing the needs of clients and customers to continually shift. Thus, the more closely aligned are teams to the needs, goals and concerns of clients and customers, the better they'll be able to respond and deliver real results. This article covers the steps to guide leaders at all levels and teams through an effective alignment process.

The purest definition of alignment is an adjustment of an object in relation to other objects or an arrangement in a straight line. When this is in place with a team, people feel they are in the "flow," a zone where large, complex issues seem to glide through to implementation with greater ease, less time and improved morale. The team's emotions range from anxiety (good, because it keeps everyone realistic) to feeling focused and exuberant, since everyone is clear about the end game. With this range of emotions, the team has a better chance of achieving the needed results, so that they can figure "it" out. The following four steps provide a suggested roadmap for achieving team alignment at every level of a project. They include clarifying the team's perspective, soliciting external feedback, understanding the gap and planning for the future. Remember, even after you've taken these steps once, your team will need to strategically reconvene to ensure the right work is getting done.

## Step 1: Clarify the Team's Perspective

You and your team are at the heart of the alignment process. That's why it's important to begin with your team and develop a clear understanding of their perspective. Try using the following questions to begin the necessary dialog to explore the team's thinking:

- What are our priorities and how do they map to the company's strategic direction? *(Try asking this question and have everyone write down their answers. We typically see wide variances in responses, which is terrific data for helping you understand what you need to address with the team.)*
- What is the work this team must accomplish together? *(There is work that people do on their own. Defining the purpose of the group's*

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*work will help define what is in and out of scope for the team.)*

- What do our stakeholders value most about us? How do we think we are doing in providing this compared to what *they* think?
- If we can only focus together on one or two mission-critical initiatives, what are they and why? *(If you suffer from "400 Initiative-itis," this is data for you and your team, who may be at risk for addressing much and accomplishing little.)*

Leaders need the emotional fortitude to decide what they are not going to do and must help their team do the same. Scope creep happens so quickly and it's very subtle. For example, an IT Vice President of a healthcare company was asked by one of the business leaders if he would add a new project to the agreed-upon prioritized list. An all-too-accommodating response would be to accept the project from a desire to be as supportive as possible. However, this VP did his job. He asked which of the agreed-upon initiatives would have to come off the list in order to support the new request. Such a response may have seemed outrageous to the business leader, but the previous year, this VP had not been successful in accomplishing the list of 400 IT initiatives because everything was a priority. This executive team was not clear on what they had to drive together.

After you thoroughly explore the above questions, the next part of the clarification process is to ask your team to shift their perspective to that of your clients and customers. Ask your team to stand in the clients' shoes and make a list of what they believe the clients value. Then have the team prioritize that list and grade themselves on each activity or deliverable.

This exercise provides two essential benefits. First, it stimulates discussion and debate among the team, enabling them to discover areas where team members' thinking overlaps and where it is disparate. Second, it forces your team to see themselves, their work and their value through the eyes of your clients and customers. This data provides a baseline for comparison of the team's thoughts with the next step, client and customer feedback. Even though no actions or goals have been planned yet, this is the beginning of alignment and will help accelerate the planning process.

### Step 2: Solicit External Feedback

Your team's thinking and perspective make up only the first part of the equation. To complete the equation, the team needs to proactively solicit candid and revealing input from clients and customers. The combination of your team's self-assessment and the feedback from their clients will provide valuable information and help clarify perceptions, allowing your team to work toward alignment.

The intent of collecting client feedback is to become clear about your client's priorities and how you can help them be more successful. You need to understand how your team is perceived so that you can improve your impact if possible. The by-product can be a better understanding of what others value about the team's work and how your clients depend on you.

There are several ways to collect feedback; the method you choose will depend on such factors as your current relationship with clients, the relationship you want to build, the level of experience and maturity of your team, and timing. You can collect this feedback yourself (via online survey or in-person interviews) or have an outside group do it for you. There are pros and cons to each method. Doing it yourself, you risk not gaining objective feedback, and if the data collection is done by a less experienced team, you and the team can be put in a vulnerable position. On the plus side, the direct contact allows you to start building better relationships.

Employing external resources for support allows the outsider to probe areas that you may feel uncomfortable exploring. An experienced interviewer and consultant typically can elicit much more information in a shorter time. A possible disadvantage to using outside help is the investment, as well a perception that you are temporarily distancing yourselves from your stakeholder. We tend to recommend online surveys for the purposes of gaining alignment only if such surveys are coupled with qualitative interviews. Because people are inundated with email, it's much easier to overlook a survey email in an overcrowded in-box than to disregard a 30-minute interview.

Clarity about external perceptions is one of the great strategic levers. Your team will gain knowledge and insights that will allow them to target their efforts and discover their core levers – those areas enabling them to produce great results aligned with strategic goals. After one client went through this interview process, they realized that their attempts to provide great service had actually created the perception that they were merely order takers and unable to speak knowledgeably with the customer. As a result, the team established a portfolio prioritization process, which helped them be strategic partners with their customer. This also allowed them to align not only the business leaders but also the senior technology leaders and their entire function, enabling much faster decision-making processes and more effective resource allocation.

**Asking the Questions**

Asking for and receiving candid feedback may feel a bit awkward. It takes courage on your team's behalf to want an honest opinion about themselves and their work. Feedback can be confronting and may force the team to deal with issues that they have successfully avoided or ignored for some time.

Fortunately, clients and customers are usually pleased and impressed to be asked to participate in this important process, and they support the person or team seeking their input. Many stakeholders we have interviewed report they have *never* been asked for their opinion.

The questions you'll ask clients and customers are similar to what you discussed together as a team in Step 1.

- What are the priorities of the clients we serve?
- What do they need most from us?
- What economic and business value do they gain from us? And if they don't get what they need, what are the associated fiscal, company and career implications?
- How does this team score on giving you what you needed? If low, what specific suggestions do you have to improve it?

This candid feedback is invaluable and directly feeds the team on the work they must be aligned on. Note that just because a stakeholder gives you specific suggestions does *not* mean you are the order taker who will give them what they demand. You must sort through all the work and priorities, decide what is realistically doable and what is not, then work these decisions with your stakeholders so you can manage their expectations.

## Step 3: Understand the Gap

After meeting with your selected clients and customers (if you have chosen to solicit feedback through meetings rather than surveys), your team will have an abundance of data to explore and compare to their team assessment. The team will need to sort through the data and surface common themes – areas where their assessment and that of their clients and customers overlap. There will also be discrepancies, things your team had not thought of before or areas they thought were going well but that your clients feel could use some attention.

For example, a European pharmaceutical company's U.S. site expected to receive glowing feedback about their governance process. Instead, they realized their leadership team needed to be more active in influencing the drug candidate development process than they had been previously. If they did not step up, they learned they were at risk for being left out of instrumental decisions that would affect funding.

## Step 4: Plan for the Future

Given what your team has learned, what changes could be made to elicit results? Are these changes feasible? With some introspection and a true understanding of clients' and customers' feedback, your team will have the necessary data to help them make decisions about the right next steps to align their strategy and goals with what is expected of them.

Once the team has the data, it needs to be interpreted, refined and prioritized. Ideally the team should only focus on one to two (three at most) key areas to make the greatest impact – otherwise, they risk taking on too much. The team must define the expected outcomes and how these will be measured.

At this point, true alignment is developed through the thoughtful dialogue process described in this article. Teams can move very quickly after this point because they are clearer about the issues, what is at stake and the results needed. Before seizing on the first solution the team develops, try coming up with several different ways to address the issues. Teams must make certain they are addressing the right problem before they develop solutions. A team will be more successful at attaining sustainable results if they ask themselves questions like: What are we missing? Does this solution address our root problem? If we do this, will it fix the problem even after we are gone?

After this, a team's game plan can be easily developed and refined. As part of the refinement process, aligned teams regularly revisit their strategic plans to address new or shifting environmental factors. By doing this, the team cascades the changes to their stakeholders and team members, ensuring that progress is being shared and priorities are being addressed.

At a recent annual planning session, a retail HR outsourcing team revisited their stakeholders and team members after 12 months and gained huge credibility in the eyes of their customers for accomplishing their game plan. They had stayed focused on the critical work and were able to implement an innovative time clock system that decreased payroll processing time by 18 percent. This was a win for employees because they received their paychecks more accurately and a win for the company because they automated a system that yielded a 22 percent savings in processing fees.

When teams are aligned, they are far more powerful, efficient and effective than when they are fragmented. Taking a small amount of time upfront to have the critical questions answered and integrated into your plans can yield positive financial, customer and employee results.

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