

# Successful Strategic Alignment

## Aligning with/Informing Top Organizational Goals (TOGs)



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# Plan for Day

- Understanding basics of Strategic Planning
- Work through **Alignment**
- Ensure **Engagement**
- **Execute** with Confidence

**Align – Engage – Execute**

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# Basics of Strategic Planning

## How do we Get Started

- Why are you doing it?
- Mission-Vision-Values
- Environmental Scan/SWOT Analysis
- Organizational History
- Leadership Readiness

**Align – Engage – Execute**

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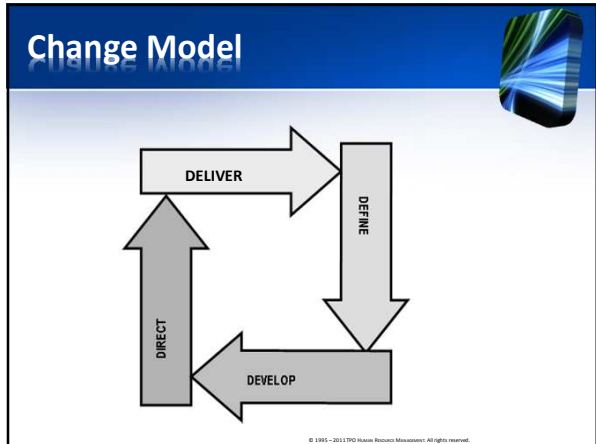
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## Define the Goals

- Create a vision for the outcome you want
- Help people understand the value of the goals early on
- Get key people to support and sponsor any changes

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## Facts About Goals

### Survey Says . . .

Getting Things Done	Rate of Success
Decide on a goal or priority	10%
Consciously decide to go for it	25%
Decide when you will do it	40%
Plan how you will do it	50%
Commit to someone else that you will do it	65%
Have a specific appointment with the person you committed to, at which time you will report to him/her whether you have done it	95%

Survey Conducted by Stephen Covey & Associates

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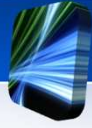
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## Facts About Goals



### Survey Says . . .

- 15% can identify most important goals/priorities.
- 19% are passionate about goals.
- 49% of work hours spent on goals.
- 51% do not understand what they can do to achieve goals.

Harris Poll Survey -- 2006

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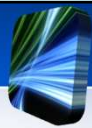
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## How to Be Successful



- Commit to Success
- Schedule for Specific Reporting
- Clarify Goals
- Clarify Actions to Meet Goals
- **Land One Airplane at a Time!**



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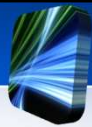
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## Map for Safe Journey



- Destination
  - Focus on Top Organizational Goals (TOGs)
- Flight Plan
  - Translated Goals = Specific Actions
- Radar Screen
  - Motivational Scoreboard
- Flight Crew
  - Accountability for All

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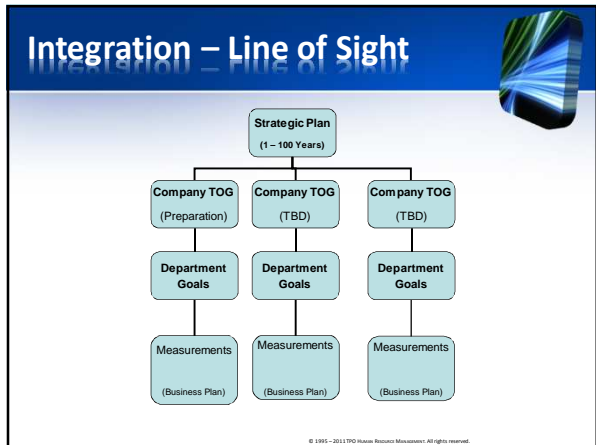
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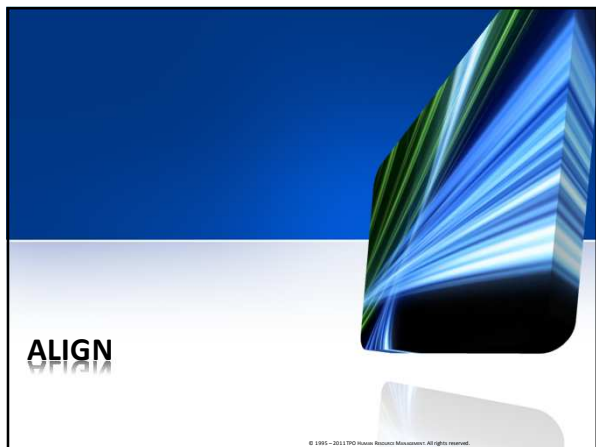
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**TOGs**

**What is a TOG?**  
**To identify Top Organizational Goals, Ask This:**

***"What goal(s) must we achieve in the next year or NOTHING ELSE MATTERS?"***

**!**

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**Examples**

- Leverage current intellectual capital to produce top two industry applications for CUTE in US.
- Increase China presence to three provinces capturing 48% of market for Ag line mechanics.
- Invest current surplus from Mexico venture to create virtual monopoly in North Central US berry market.

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**Remember – SMART Goals**

<b>S</b> pecific	<ul style="list-style-type: none"> <li>▫ detailed, particular, focused</li> <li>▫ <i>"Improve use of PeopleSoft. . ."</i></li> </ul>
<b>M</b> easurable	<ul style="list-style-type: none"> <li>▫ quantifiable, a standard for comparison</li> <li>▫ <i>"...by increasing to 3 modules."</i></li> </ul>
<b>A</b> ttainable	<ul style="list-style-type: none"> <li>▫ practical, achievable, accurate, possible</li> <li>▫ <i>"(Increase). . . from current level (understanding one module) to competent use of 3 modules."</i></li> </ul>
<b>R</b> elevant	<ul style="list-style-type: none"> <li>▫ having a clear impact on the organization</li> <li>▫ <i>"...so that employees can use as tool for productivity."</i></li> </ul>
<b>T</b> ime & Resource	<ul style="list-style-type: none"> <li>▫ scheduled, regulated by time, extent of resources allowed, deadline</li> <li>▫ <i>"By June 30, without additional overtime."</i></li> </ul>
<b>C</b> onstrained	

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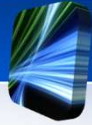
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## Next Level – Part II



### Finance Department:

Complete purchase of Associated Finance module by January 2012. Run dual systems and testing with complete conversion by January 2013 within 5% of approved budget.

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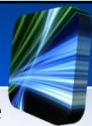
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## Measurements



- Now we will work with the Goals we have just discussed – or your own
- Use the Measurement Builder to develop at least two measurements.



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## Use this Tool



### Measurement Builder

**Goal:**  
List potential measures that would show progress toward this goal.  
If you could choose only ONE of these overarching measures, which would have the greatest impact on helping you achieve this wildly important goal?

- |    |    |
|----|----|
| 1. | 5. |
| 2. | 6. |
| 3. | 7. |
| 4. | 8. |

- Measurement Credibility Checklist**
- |  |  |
|--|--|
| ■ Accurately tracks progress toward the goal | ■ Tracks outcomes as well as activities        |
| ■ Inputs cannot be easily manipulated        | ■ Is truly achievable                          |
| ■ Is influenceable by the team               | ■ Has no unintended consequences               |
| ■ Drives the right behaviors                 | ■ Value of measuring exceeds cost of measuring |

Measure:  
Current Result:  
Target Result:  
By When:

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## Aligning Actions with Goals

- The final step is to develop specific actions you must take.
- Use the Goal Action Form as a test for feasibility and to plan how to get to work

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## Tool for Alignment

### GOAL ACTION FORM

Once specific goals have been set use this Goal Action Form to document the "action plan" for goal achievement.

GOAL:	RATIONALE FOR THIS GOAL:
ACTION PLAN: (Steps/Procedures/Assignments)	DEADLINES:
PROJECTED RESULTS (Success Indicators) Immediate: Long Term:	
DISTACLES/CONSTRAINTS	
COST (Dollars, Staff Time)	

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## ENGAGE

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## Four Stages of Learning

- Unconsciously Skilled
- Consciously Skilled
- Consciously Unskilled
- Unconsciously Unskilled

It can take up to **500** repetitions to move from unconsciously unskilled to unconsciously skilled! Be patient and stay with it!

*"We are what we repeatedly do. Excellence, then, is not an act, but a **habit**." -- Aristotle*

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## Engaging the Workforce

- Motivational Scoreboards
  - Must include
    - Current level or state
    - Target level or state
    - Deadlines for each increment
  - Must be visual and compelling
    - Motivate on a daily or weekly basis
    - Where it can be seen by all
    - Examples



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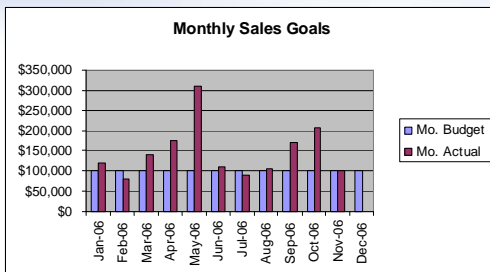
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## Sample 1



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## Sample 2

### Building Our Goals

Help us Build the Tower  
•Each Vice President has goals to deliver  
•Each Team has timelines for completion  
•We are all dependent on each other to receive our full bonus  
•Keep each other accountable  
•Remember everyone is counting on YOU to complete your goals



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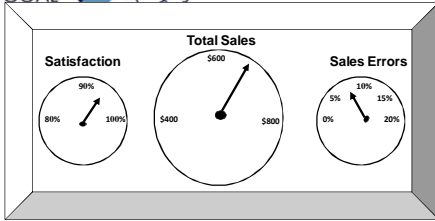
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## Sample 3



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## EXECUTE

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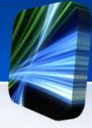
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## Accountability



- Use planner/calendar
  - Any kind will do
  - Keep it regularly
  - Coordinate with colleagues
- Delegate and Inform
  - Everyone involved must help
  - Tell them what you need
  - Ask what they need

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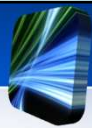
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## Best Practices for Teams



- Calendar regular meetings
- Develop assistance plans
- Do checkups with external or internal resources
- These are NOT interruptions



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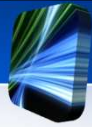
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## Use Tools



- Work Plan
- Other Examples in Appendix
- To Do List
- Day Planner/Day Runner
- Multi-month Calendar
- Do **NOT** leave it to Post It Note Management



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## Sample Tool

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## Hold Effective Meetings

- Have a Clear Purpose
- Pre-define Desired Outcomes
  - Brief
  - Specific
  - Measurable
- Decide Who Attends
  - Everyone Necessary
  - No One Unnecessary
- Have an Agenda – and **STICK TO IT**

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## Meeting Roles

- Leader
  - Prepares Agenda
  - Acts as Meeting Facilitator
- Timekeeper
  - Informs Members of Time Taken on Items
  - Reminds of Time Left in Meeting
- Recorder
  - Records Ideas, Decisions & Action Items
- Gatekeeper
  - Assures Participation by All
- Team Member
  - Focuses on Topic/Purpose
  - Offers Ideas/Facts/Opinions

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