

Six Easy Steps to Get – and Keep – Your Leadership Team on the Same Page

...Including How to Run a Successful
Strategic Planning Meeting with Your Leadership
Team and Tools to Maximize Alignment



Coach²Growth
Lead Confidently™

Welcome!

I'm happy that you found your way to my eBook.

I wrote this eBook because I'm passionate about helping clients grow as leaders. Growing as a leader for many people means **moving from a heads-down to a heads-up approach**. If we're too focused on checking off our "to do's," we cannot possibly contribute our brilliance to driving the big picture...big picture meaning **strategy...or, how we get there from here?**

What's more exciting than helping clients come up with growth strategies is seeing them gain alignment across their team and/or cross-functional stakeholders. Rather than determine strategies from on-high, then rolling them out with hope that they stick, **I share an approach in this eBook to help leaders ensure their dazzling strategies have the buy-in and additional insights from those chartered with ensuring their delivery...**and will be excited by them too.

This eBook will guide you through the **"Six Easy Steps to Get – and Keep – Your Leadership Team on the Same Page."** It includes how to run a successful strategic planning meeting and is chockfull of re-usable tools and templates, which I've used successfully with many clients.

I welcome your feedback and ideas, and would love to hear about how this eBook has helped you along the way.

Here's to your success and **Leading Confidently!**

Jacqueline

Legal Gobbledygook and Such:

The information in this eBook is for informational purposes only. Guidance provided is grounded in experience and does not constitute a guarantee of success. Readers of this eBook are advised to conduct due diligence and tailor tools and information to their individual circumstances when making business decisions based on information in this eBook.

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Introduction

While difficult to measure, lack of alignment across your leadership team is costly. When your team members are not on the same page, it tends to show up in the team's performance and overall commitment to a particular initiative or goal. What's more, **inconsistent views on direction and strategy across your leadership team can result in employee dissatisfaction and a reduced level of engagement.** When one of your leaders is not aligned, it can create confusion and wasted time within the team as employees try to rationalize different messages coming from various directions within the company. At the end of the day, lack of alignment across a leadership team slows down progress, or worse, derails it.

Leadership alignment is not something many senior leaders think about until things start to fall apart, deadlines are missed, or there is discontent brewing within the ranks. For a quick way to assess whether your leadership team is fully aligned, complete the following Leadership Alignment Assessment Tool by:

- Recording *your* answer to the following questions under the "Baseline" column.
- Asking *each team member* the same questions.
- Indicating alignment with your baseline answer in the "Yes" or "No" columns. "

Leadership Alignment Assessment Tool				
What are the company's (division's or department's)...		Baseline	Alignment	
			Yes	No
1	...vision and mission?			
2	...top X goals?			
3	...strategies for achieving goals?			
4	...top X initiatives?			
5	...business model?			
6	...most profitable customer segments?			
7	...most profitable product/service lines?			
8	...compelling, differentiating value proposition?			

Leadership Alignment Assessment Tool ©2015 Coach2Growth, LLC | www.Coach2Growth.com



If your leadership team cannot answer these questions with some level of consistency, they are not all working in lockstep, and as a result, you are not getting the most from your team.

One of the most effective ways to build alignment across your leadership team is to ensure that each individual has:

- Participated in the development of goals and strategic direction
- Sufficient buy-in so that their behavior does not cause friction or confusion
- An active role in ensuring that the plan moves forward
- A way to be held accountable for the success of the plan

It always makes sense on paper, but when you're in the weeds of running the day-to-day business, taking time to build alignment can feel like an unnecessary formality. Holding people accountable takes intestinal fortitude. It takes a strong leader to insist on and invest in a repeatable process that stipulates input from the team, and holds their feet to the fire.

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If you decide to implement a strategic planning process, that means meetings, and **meetings cost a lot to run**. Using an online meeting cost calculator, you'll see that **an eight-hour planning session costs the company \$7,600 before you add in lost revenue as a result of being captive all day** (10 leaders * \$175,000 on average). No matter the size of your company, when you decide to invest that much in a meeting, it must produce results that are productive and sustainable.

So, the question is: **Does the cost of not having leadership alignment outweigh the cost of investing in a process to keep the team aligned?** We, of course, think that investing in a planning process is, ultimately, less costly. In addition, it's what separates a successful, thriving team from one that stirs up a lot of activity, looks busy and haphazardly achieves some of their goals along the way.

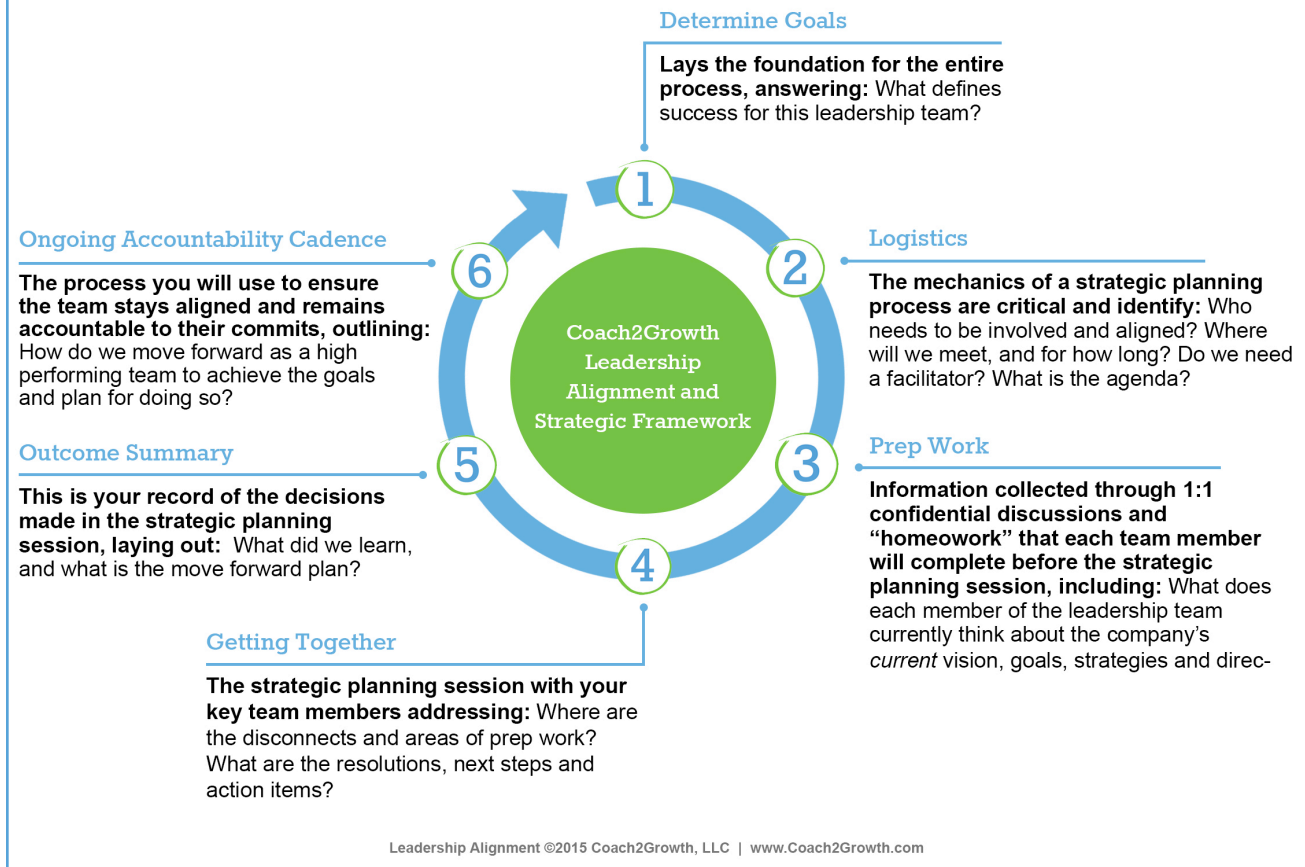
What does a strategic alignment process look like? It's simpler than you might think.

The Leadership Alignment Process

Few leaders are blessed with a team that is fully aligned all the time. New people come into the organization, team members move on to other opportunities and business requirements change. The following six-step process is designed to ensure your strategic planning initiative runs smoothly, ensures participation, invites ideas and brings your team along (without kicking and screaming).

Leadership Alignment Process

Or, How to Rock the Strategic Plan in Six Steps



1 Determine Goals

Identifying goals lays the foundation for the entire strategic planning and alignment process and specifies what defines success for this leadership team. Sample goals might include:

- To ensure the entire leadership team is aligned with the strategic plan
- To determine the top X strategic initiatives for 20XX
- To identify what initiatives we are not going to do in 20XX
- To build a sense of trust across the leadership team
- To build our strategic planning framework for 20XX
- To identify top X ways to scale our business



2 Logistics

The mechanics of the process are just as important as the content, and address the following key questions: Who needs to be involved, where will the team meet, for how long, whether you need a facilitator, and what is the agenda.

- **Selecting participants** - There's a fine line between inclusiveness and being productive. **The ideal strategic planning meeting will include 8 to 15 people to maximize participation.** Beyond 15 participants, you either have people doing email because it's easy to hide, or you will unintentionally suppress the opinions of those not likely to speak up, purely because there isn't enough time to tease out the viewpoints from everyone.
- **How Many?** It's not all about the number of participants, though. **You have to have the *right* people in the room.** In selecting who participates, identify what information is needed for the meeting to be effective. Then, identify the subject matter experts (SMEs) about that information, and determine which SME should be present to accelerate on-the-spot decision-making. Sometimes there are political reasons indicating whether a specific individual should be included; **seek to minimize including anyone who will not have an active role in the discussion.** Watch out for discussion-dominators as well: You also don't want to invite someone who is known for taking *too active a role*.
- **Where will it be?** This one's easy. The best place for a strategic planning session is **outside of the office.** It's too easy for people to get distracted with the day-to-day, or caught in a hallway during a break if the meeting is held at the office. Make the investment in an offsite location to minimize distractions.
- **How long does it take?** Most meetings of this caliber take a **full day up to 1 1/2 days.** Any longer than that, eyes start to gloss over and energy wanes.



- **Facilitator or not?** A strong facilitator is an important investment if you want to ensure the meeting runs on time, and your objectives are met. **A good facilitator will keep participants focused on the agenda and minimize distractions resulting from sidebar issues..** Because facilitators approach the meeting from an objective point of view, they can help keep things in perspective and emotions in-check.
- **What is the agenda?** The “time-boxed” agenda is critical as a guidepost for managing the meeting. Here is a sample agenda for a one-day planning session:

Sample Strategy Planning Session

Objectives:

- Gain alignment across the team on [your company’s] business objectives, situation, opportunity and direction.
- Prioritize key initiatives and strategies to serve as the framework for the company’s working business plan.

Agenda:

Time	Topic
8:00AM-9:00AM	Introducing/stage-setting/level-set <ul style="list-style-type: none"> • Opening statements, agenda & Objectives • Observations & Premise for this meeting • Meeting expectations & long-term plan
	High level interviews summary
9:00AM-12:00PM	Envisioning the future & identifying objectives*
12:00PM-3:00PM (includes working lunch)	Identification & prioritization of top business objectives to realize vision*
3:00PM-4:30PM	Identification of top strategies and tactics to accomplish business objectives; as many as possible*
4:30PM-5:00PM	Next steps & close

*Using prep work assigned ahead of time

Sample Strategy Planning Session ©2015 Coach2Growth, LLC | www.Coach2Growth.com



3 Prep Work

The prep work is driven by your objectives, defined in #1. **The more you do up front, the more meaningful the meeting.** We like to work from a “no surprises” point of view when designing and facilitating a strategic planning meeting. **Prep work tends to draw out the sacred cows and sensitivities before the meeting**, so they may be understood and managed and don’t take up precious meeting time. We use two tools to prepare for a meeting of this importance:

The more you do up front, the more meaningful the meeting.

- **Leadership Assessment.** Company leaders are busy people and don’t often take time to step back and evaluate their team’s performance or direction in context of the company’s vision, mission, objectives and strategies. Allowing each participant to do so during a



confidential one-on-one interview with an objective party offers each leader the opportunity to be heard. It also allows the facilitator to identify disconnects and gaps across the team. This information is then packaged into a “worldview” (never personally attributing input to a particular participant), enabling the team to get a sense for their alignment and which specific areas need to be fleshed out.

The following chart is an example of questions asked in a typical interview with company leaders:

Sample Interview Questions by Role

Vision, Business Model & Strategies	CEO/Pres	VP Ops	VP Mktg	VP Sales	VP Services	VP Prod Dev
1. What is your vision for the company?						
2. What is your current thinking about an exit strategy?						
3. How is the company valued today? What is the current evaluation?						
4. What is the current business mode? What are the primary revenue sources? From where does profitability come?						
5. What are current business objectives (to include revenue plan for next size, 12/18 months)?						
Customers and Go-to-Market						
6. How much business comes from each customer segment, and what would you like it to be? Does this differ geographically?						
6a. Which segments are most profitable, and why?						
7. Who are the decision makers/influencers throughout the buying process?						
7a. What does the sales cycle look like?						
8. What does the go-to-market “food chain” look like? How do current technologies/products reach end customers?						
Products/Services						
9. What is the current product/technology strategy and roadmap?						
10. Where is technology in its life cycle (early adopter-late majority)? Describe for each (high level) product line if there are differences						
11. From the end customer viewpoint, what makes up the complete solution? In other words, what else goes into the solution, beyond company offering?						
Value/Business Proposition						
12. What has been the most compelling, differentiating value proposition to reach desired customer segments?						
Strategy Workshop						
13. If you were to look out six weeks from now, what would have happened for this session to be deemed a success?						
Sample Interview Questions By Role ©2015 Coach2Growth, LLC www.Coach2Growth.com						

- **Prep work for participants.** In addition to leadership interviews prior to the meeting, **completing prep work enables participants to formulate a point of view beforehand, and maximizes productivity of the session.** It lets the group hit the ground running. Here is a sample of the first question often found in the prep work (see appendix for additional sample prep work questions):

Sample Strategy Planning Session Preparation

The following “homework” is designed to give you an opportunity to do some thinking ahead of our meeting, and make our time together most productive. There are no wrong answers and the fill-in-the-blank approach is intended to get ideas flowing. Completing the questions ahead of time will give us more time for meaningful dialogue and ensure that everyone’s input is captured. Please bring this document completed with your notes for reference. Thanks.

Please complete the following with your ideas about what [your company] looks like *over the next three to five years*. For context, feel free to note current state and what will be required for change for reference.

	Business	Revenue	Profit
(1) What is the business model? (In other words, what percentage of the business comes from hardware, software, services, other?)	Hardware		
	Software		
	Services		
	Other		
	Total	100%	100%

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4 Getting Together

Most strategic planning meetings designed to bring alignment across the team involve the following four elements.

- **Team building** – This does not have to be a “touchy-feely” exercise, but many groups benefit and learn from a fun team-building icebreaker. Generally we do this at the beginning of a meeting, which gives the group common ground to reflect upon, and often laugh about, throughout the meeting.
- **Stage setting and readout of interviews summary** - This is the part of the meeting where the summary of the interviews is presented to the team. Sometimes **the readout serves to validate the disconnects felt by individuals across the team.** Other times, the readout reveals additional areas or an increased magnitude of disconnect not understood before. Either way, it's a level-set for the team and highlights the areas upon which the group needs to focus.
- **Prep work facilitation** – This is the meat and potatoes of the meeting. Here, **we work through each question of the prep work assignment and wrestle the big questions to the ground.** Depending on the size of the group, we may have small teams work on certain questions and present back to the larger group, or we may invite participation from the entire group.
- **Next steps with action items, responsibilities and timelines** – This is often the place in the process where the well-intended “offsite-planning meeting” goes awry. Many times, participants head back to their day jobs and the planning session quickly becomes a distant memory. So, once the strategic business questions have been determined, **it's time to identify next steps along with an action plan for who is going to own what.** It's also critical at this point to decide on **the team's plan for ensuring accountability,** determining the next time the group will meet to review progress, and how often after that.



5 Outcome Summary

But, wait! We're not done yet. It's not enough to develop next steps; there needs to be a summary of the meeting content overall, referencing the context around how the team got to the primary decisions. This is often done by your facilitator, but doesn't have to be if you have a resource internally who can record information and put it in a format that everyone understands. **Ideally, it should document the context and results from the time you spent together, along with next steps identified above.** This outcome summary becomes your working document of record for the strategic planning process.

6 Ongoing Accountability Cadence

Steps 1 through 5 are critical, but only the beginning. The outcome summary, in particular, serves as the framework for ongoing performance and accountability. Even more critical is developing a process

Even more critical is developing a process for keeping the team aligned and accountable to the plan.

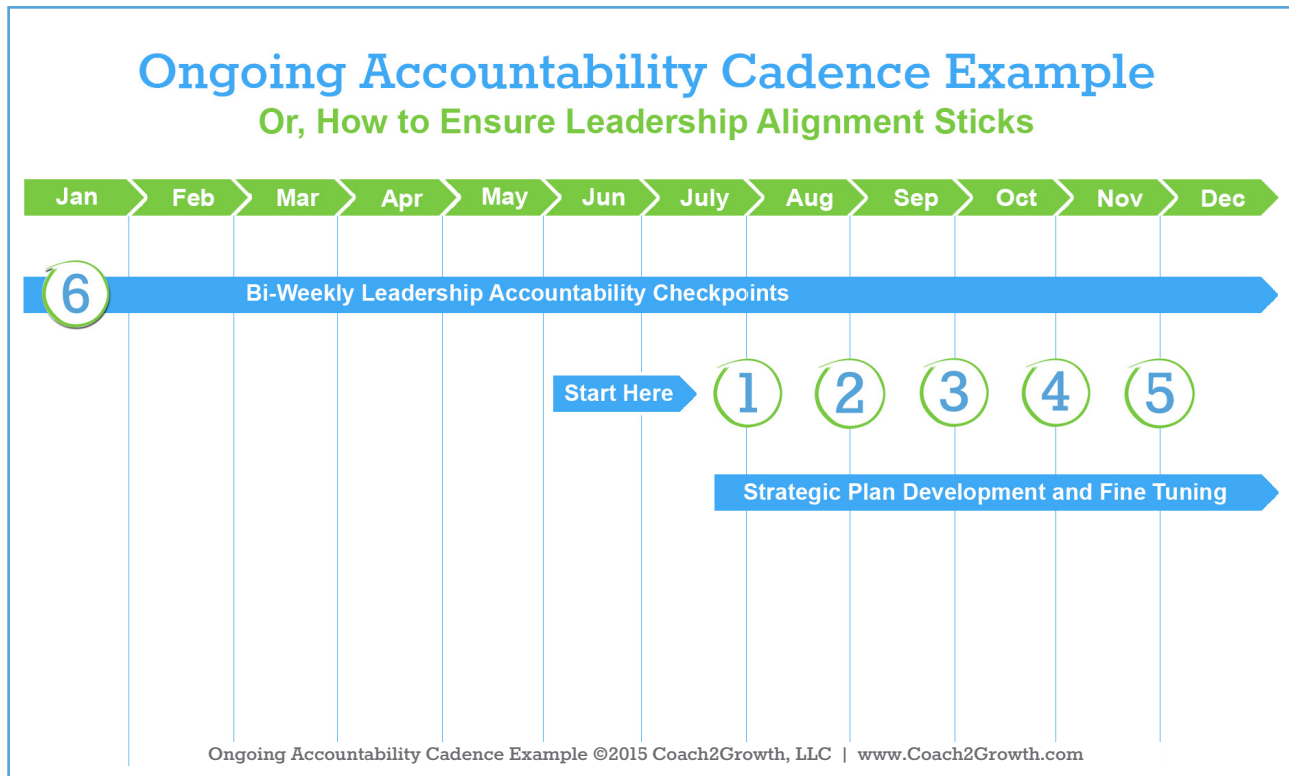
for keeping the team aligned and accountable to the plan. Ultimately, you need someone to own the process overall. Then, a regular cadence must be established around



ensuring each team member is working his/her part of the plan and their commitments. **You need a process for escalating and removing roadblocks on a regular basis, and minimizing potholes.**

Lastly, you need a way to ensure that the rest of the company understands the strategic plan and what is expected of them moving forward. That's an entirely different eBook, though.

The following visual is an example of how you might integrate the six steps outlined above into a timeline to set up your team's accountability cadence moving forward over the next year.



Thank You for Reading this eBook.

There you have it. When you have a process for managing it, gaining leadership alignment is not as hard as it sometimes looks. I hope this eBook helps to make your life easier and your team more productive.

If, however, you would like additional information about how to build leadership alignment or our leadership coaching services, visit our website www.Coach2Growth.com or reach out to Coach2Growth directly at JFranklin@Coach2Growth.com.

Coach2Growth helps Executives and Corporate Leaders, Business Leaders, and Leaders in Transition grow by capitalizing on their strengths and innate ability to lead and partner. With our guidance, business people succeed, achieve more, gain recognition, and grow and prosper fearlessly.

About Jacqueline:



Jacqueline's breadth of leadership experience includes driving sales at a large technology company, building a \$100M indirect channel for a leading software firm, and heading up marketing for an Internet start-up. She founded Routes2Market, a boutique consulting practice, parlaying her success and skill at building strategies and programs to help multi-billion dollar companies like IBM, Akamai, and Verizon Wireless achieve significant growth. From this work, she saw firsthand that the best growth strategies in the world were destined to fail without fully engaged and competent leadership. Jacqueline set out to change that by shifting her professional focus to working with business leaders to realize their full potential and lead confidently. And, Coach2Growth was born.

Jacqueline holds a MBA and BA in Social Work and Psychology. She is a Certified Professional Coach, having completed her training the Institute for Professional Excellence in Coaching, accredited by the International Coaching Federation (ICF). She is also certified as an Energy Leadership Index-Master Practitioner.

Learn more at coach2growth.com/about-me.

