

LEADERSHIP TEAM ALIGNMENT

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LEADERSHIP ALIGNMENT CYCLE

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INTRODUCTION

Welcome to our Leadership Team Alignment tool for leaders, a tool that will help you get your leadership team committed to important organizational goals. The end product of this leadership practice is a team committed to deliver leadership and results. The practice describes how to get:

- 1) Clarity about your leadership visions, decisions, plans, and expectations
- 2) Clarity about your team's reactions to your direction and expectations
- 3) Commitment through resolving whatever reservations your team has

We each have worked over 30 years as executive coaches and leadership consultants to executives in Fortune 500 companies in a variety of industries. We help leaders both to mobilize their teams and to get results. Many leaders have not figured out how to integrate this double mandate. This Leadership Team Alignment practice is one of a suite of tools helping leaders to do just that. We call that suite the Leadership Alignment Cycle and we have helped leaders use these tools to great effect.

Over several decades, we encouraged and witnessed the interaction patterns that create success. We have discovered -- with our clients -- the reliable and repeatable interactions between a leader and team that boost productivity, engagement, commitment, and results. By working the elements of the Leadership Alignment Cycle, you take advantage of huge opportunities for everyone's success and satisfaction that most leaders miss.

The quality of a leadership team's alignment is the most influential factor in determining their organizational results. As a leader, you and your organization are best served by ensuring that your leadership team is completely committed to deliver results, address opportunities and problems that interfere with progress, and create a culture where alignment is valued.

Using this tool will help eliminate the two main reasons that teams don't execute on decisions and plans: confusion about goals and expectations, and unresolved reservations to

commitment. The leap from decision to implementation, without taking the time to address these problems often guarantees that the implementation will falter or fail.

ALIGNMENT - THE KEY TO SUCCESS AND SATISFACTION

The Leadership Alignment Cycle is a sequence of ground-breaking leadership practices that:

- Accelerate breakthrough results
- Reduce confusion, conflict, and wasted effort
- Increase value and satisfaction of meetings and interaction
- Provide a framework for leadership development
- Transform the culture of the organization

The Leadership Alignment Cycle is a set of groundbreaking interaction practices that guide leaders to address alignment as they –

- Create a leadership vision
- Address team reservations and commitment
- Coordinate departments
- Cascade alignment throughout the organization
- Develop talent and performance

The Leadership Alignment Cycle activities rely on the following principles:

1. Leadership activity must be oriented toward tangible results.
2. Leaders must lead, and teams must influence within parameters of desired outcomes
3. Success depends on getting everyone working together in the same direction
4. Leading with maturity promotes both results and satisfaction
5. Interpersonal skill and emotional intelligence are prerequisites
6. Personal development never ends for leaders
7. Authority is a resource, neither a weapon to be wielded nor a danger to be avoided.
8. Leadership practices cannot occur by email; they require live interaction.

At each step along the way, alignment means getting the horses pulling in the same direction, and this often means addressing both conflict (managing different perspectives) and authority (managing who decides), as you work to achieve results.

Conflict and authority are often thorny topics that people (and leaders!) avoid, precisely because they don't have a reliable way to navigate the dangers. After enough painful failures, leaders often avoid the risks altogether. They know this evasion costs them progress, but the threat of getting into trouble with others can be too much to face.

These leadership practices will help you guide your team through these hazards, building resilience along the way. As we mentioned earlier, what is most often missing when leaders fail is the thoughtful use of interaction practices as leaders accomplish these important tasks with their teams.

Great leaders have a clear perspective on the need for effective interaction to achieve results in their organization, as well as what constitutes both effective and ineffective interaction. Their images of great and poor interaction drive what they pay attention to with their team and how they intervene as leaders. High quality alignment requires direct and open interaction among your team – as a group. As a leader, you need people at all levels in your organization engaged and committed to this important priority.

LEADERSHIP MATURITY

In order for any leader-team interactions to be successful, they require you to bring authenticity and rigor to your leadership. From our experience, leaders face four consistent choice points which, if they exercise maturity, they can deliver outstanding results. You will find that the Leadership Alignment Cycle tools stretch you to develop your Leadership Maturity, which deals directly with the following four choice points.

The Leadership Maturity choice points are --

- Face vs. avoid leadership challenges
- Use vs. abuse or refuse authority as a resource
- Integrate vs. separate leadership maturity, team functioning, and results
- Shift vs. tolerate unproductive interaction patterns*

Leadership maturity drives alignment, and alignment drives outstanding results. This requires transforming how you show up to lead. The secret to leadership maturity is how well you embody and balance “backbone and heart”[®] as you face the four choice points with your team. As a leader, you are challenged to: 1) choose your stance, AND 2) value other's interests as much as your own, and then 3) use your authority to decide or delegate appropriately, and ensure that other's resolve their reservations to commitment. What is most often missing when leaders fail is the thoughtful use of this kind of direct interaction as a practice. Only through these mature interactions can you address important issues of conflict and authority, and create committed, well-coordinated leadership teams that cascade that alignment throughout the rest of your organization.

*** NOTE ABOUT PATTERNS:** The 4th choice point – shift vs. tolerate unproductive patterns – is actually an important integrator of the first three choice points of leadership maturity, as well as an especially powerful determinant of team development and business results. Leaders who tolerate unproductive patterns are by definition *not* leading with backbone and heart - avoiding leadership challenges, abusing or refusing authority as a resource, and separating leadership maturity, team functioning, and results. We have found over and over, that when leaders shift unproductive leader-team patterns by facing leadership challenges, using authority as a resource, and integrating a triple mandate -- leadership maturity, team functioning, and results -- results and team satisfaction skyrocket.

TO EXERCISE LEADERSHIP MATURITY - LEAD WITH *BACKBONE AND HEART*[®] AND SHIFT LEADER-TEAM PATTERNS

If you want people to do things they haven't done before, or function in ways that are new to them, then you need to demonstrate two complementary ways of being with them: 1) clear resolve about your expectations, and 2) support to navigate the natural disruption that the change is creating for them. *You have to lead with backbone and heart.*

Backbone is having the nerve to --

- Choose your course, especially in controversial situations
- Take a clear, non-anxious position with others about your goals and expectations,
- Either hold your position even when people are anxious about your decision, or choose to be influenced by other's positions because you think it serves the outcomes best.

Heart is having the nerve to --

- Be interested in others' positions,
- Encourage others' interests and participation, and
- Invite their participation both when they agree and when they disagree with you.
- Empathize with their frustration and disappointment when you decide against their interests

The problem comes if you sacrifice either backbone or heart to manage your anxiety in challenging leadership situations. That sacrifice is an instinctual, though ineffective, response to anxiety - one that you can override with emotional resilience, intention, and mature interaction.

Rather than forfeit your backbone in order to preserve relationships, abandon your heart in order to preserve your stands and positions, or relinquish both in order to preserve the status quo even though the consequence is no progress, you can hold on to both, withstand the anxiety of the unknown, and discover the power and calm that comes from demonstrating a strong balance of backbone and heart.

If you can be insistent without being domineering or cold, and if you can be supportive without taking away your team’s challenges or opportunities, you are leading with backbone and heart and demonstrating your leadership maturity. In this tool, there is a table of backbone and heart challenges that are specific to creating Leadership Team Alignment, with suggestions on how to address them.

Shifting Patterns

One of the ways to bring backbone and heart to your leadership is to make sure that you shift patterns of interaction that interfere with success. Patterns are habits, and as such are both familiar and unconscious. Leaders need the stamina and curiosity to identify unproductive patterns, create more productive habits, and manage the natural disturbance that change provokes. Pattern shifts require you to increase your backbone and/or heart. We have never seen it otherwise. That is why knowing how to shift patterns you participate in is a subset of increasing your backbone and heart.

Since patterns are so often invisible to the people in them and need a special awareness to see them, we have a separate tool that shows you how to shift patterns between you and your team. You can find it on the store page.

THE COST OF POOR TEAM ALIGNMENT

So many leaders underestimate people’s need to interact in order to commit to something that others have decided. Without the chance to work through their natural resistance to change, execution will either be slow, poor, or both.

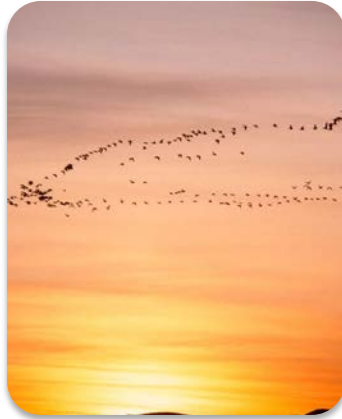
Poor Leadership Team Alignment
Team members are focused on different priorities and outcomes
Resistance goes un-addressed and causes confusion and unnecessary conflict
Staff morale is lackluster or dissatisfied because of poor organization and results
Upper management doesn’t know why results are poor (may blame employees)
Staff lose confidence in leaders and leadership teams

THE ROI OF GREAT TEAM ALIGNMENT

The need for alignment of key people to achieve results is important for any leadership team, regardless of the scale of the endeavor. Alignment is critical to implement key decisions as intended, unleashing the team to deliver outstanding results.

Great Leadership Team Alignment
All levels of management lead toward the same strategic priorities
Resistance and obstacles get resolved and confusion and conflict get resolved
Staff morale is high due to great organization and results
Upper management knows obstacles to results and takes responsibility to resolve
Downstream cross-functional teams work well and face problems together

PRACTICE OVERVIEW: LEADERSHIP TEAM ALIGNMENT



Act I
CLARITY

Act II
REACTIONS

Act III
COMMITMENT

PLANNING FOR EACH PRACTICE STEP

ACT I: GET COLLECTIVE CLARITY

Tips: It helps to establish expectations for the group discussion

1. Spend some time thinking through your talking points – how to say it best with this audience.
2. Tell your team what you're about to do so they can follow you down this new path.
3. Answer any questions they have about what you expect from them and why.
4. Consider a continuum of language and tone that sets the scene, from the language of insistence, to the language of suggestion, to the language of curiosity.

SCENE 1: Leader describes decision, vision, strategy, or plan

- Stay true to your voice. If you have a lot to say, pause in between segments so the team can paraphrase.
- Be as specific as possible: what, by who, by when, etc.
- Be explicit about any new and different expectations.
- This is a discussion between you and your team. Avoid talking as though you're setting someone else's expectations (like you manager's).

SCENE 2: Team members paraphrase, and check hunches and implications about the decision.

- Paraphrase what your leader is saying vs. state your reactions.
- Make sure to get at the root of what's being expected – that which is new and different.
- Check your hunches and any implications about the decision, especially if they are controversial.
- Get the leader to confirm or correct your understanding; both right and wrong guesses are useful.

You know that Act I is done well when...

You KNOW (vs. assume, hope, believe) that your team understands you.

Test yourself: Can you describe what your team initially misunderstood?

ACT II: ACKNOWLEDGE TEAM REACTIONS

SCENE 1: Team members describe reactions to leader's direction, especially concerns.

- Encourage honest reactions – both excitement and concerns. “I guess it’s okay...” is not enough.
- Insist they be specific and descriptive vs. general and judgmental.
- Get them to talk about what they think, feel, want, and expect. You want to hear from everyone, not just those who are more vocal or passionate.

SCENE 2: Leader paraphrases and checks hunches, especially concerns.

- Set aside the impulse to correct, persuade, and insist until Act III.
- Consider summarizing several people instead of paraphrasing each person’s reaction.
- Acknowledge and thank people for sharing their reactions, especially for raising candid concerns.
- End with a brief description of how it helps you to hear your team’s reactions.

Tips:

1. Change and new expectations – even improvements – are naturally disruptive. Don’t expect unfettered excitement. If leaders don’t acknowledge people’s reactions to change, then it is difficult for people to commit to the change. Concerns that are not addressed can be a show-stopper.
2. Leaders need to paraphrase during Act II, not justify or defend. Don’t “sell” the idea here – listen to and acknowledge reactions. Try to not judge what you hear. Often, the most important thing to people is being heard.

You know Act II is done when...

- The team KNOWS (vs. assumes, hopes, believes) that the leader understands the team’s reactions accurately.

Test yourself: Can you articulate the team’s main excitements and concerns?

ACT III: PLAN FOR GETTING TEAM COMMITMENT

SCENE 1: Team members describe reservations and what they are committed to deliver from the following options:

COMMITTED TO DELIVER

- ❖ I have no reservations.
I'm committed to deliver _____ .
 - ❖ I have reservations and am willing to trust they will be resolved.
My reservations are...
I'm committed to deliver _____ .
-

NOT COMMITTED TO DELIVER

- ❖ Reservations are enough that I can't commit until they are resolved.
My reservations are...
What would help me commit is...
- ❖ Over my dead body.

Remember:

If the team can see that the leader is not thrown off by their worries about a change, then they are more likely to start thinking about how to make the change happen.

- You need to know what's blocking their alignment and how that affects their level of commitment.
- Try to find the common ground that encompasses different points of view among the team, in service to the business problem.
- Clarify what people mean by comments that you react to intensely.
- Ask them to address their commitment to getting their own teams committed as well.
- If they are not yet able to commit to the decision, invite them to offer a solution for how their reservations could be resolved. Find out what it would take.

SCENE 2: The leader assesses the team's reservations and uses authority accordingly.

Paraphrase team's commitments, reservations, discern resistance, and set final expectations for team's commitment

Reservation Types and Leader Responses

	Natural Reservations	Problem Reservations	Cultural Reservations	
Expression Of Reservations	Concerned reactions stated before thorough understanding is clarified	Identifies obstacles to success as part of expressing concerns.	People respond with typical cultural pattern	Individual refusal to let go of concerns
Leader's Response To Create Commitment and Results	Hold the course and support peoples' capacity to adapt.	Invite people to influence, authorize problem solving	Lead the shift to new norm or pattern	Lead performance management

- Paraphrase and summarize the reservations and level of commitment you hear.
- Learn to read various types of reservations accurately, rather than thinking all reservations are challenges to your authority.
- Let people know how they influenced you if they get you to think about the situation differently.
- Be sure to authorize any problem-solving solutions that you want to happen.
- Don't let the team use refusal to commit as a bargaining chip, but only for those rare times when they believe the decision is dangerous to you, the team, the organization, or your strategic priorities. They need to be willing to risk consequences of not committing to the course of direction.
- Decide when to move a discussion from the team meeting to a one-on-one setting when a team member is not yet committed and their reservations are not resolved in the meeting

You know Act III is done when...

- You know that the team is committed and how reservations are (or aren't) resolved.

Test yourself: Can you describe and assess the team's main reservations?

PREPARE YOURSELF FOR THE CHALLENGES OF LEADERSHIP TEAM ALIGNMENT

The overriding challenge in the practice of Leadership Team Alignment is to preserve your leadership agenda while tempering the anxiety that naturally accompanies your challenge of facing their natural resistance and realistic reservations to any significant vision, decision, or change.

The Acts	What Takes Backbone	What Takes Heart
<p style="text-align: center;">ACT I CLARITY</p> <p style="text-align: center;">Getting Collective Clarity</p>	<ul style="list-style-type: none"> • Establishing purpose and ground rules of group discussion • Make sure your team truly understands you 	<ul style="list-style-type: none"> • Accepting the disruption that your decision may be provoking in them • Understanding their need to react, even though you're insisting that they understand you first
<p style="text-align: center;">ACT II REACTIONS</p> <p style="text-align: center;">Acknowledging Team Reactions</p>	<ul style="list-style-type: none"> • Insisting that the team share their honest reactions, especially concerns. • Staying with understanding concerns, vs. trying to resolve them in this Act. 	<ul style="list-style-type: none"> • Welcoming their reactions as natural and productive to their process of getting aligned. • Staying interested until you've heard their full reactions.
<p style="text-align: center;">ACT III COMMITMENT</p> <p style="text-align: center;">Getting Team Commitment</p>	<ul style="list-style-type: none"> • Insisting the team be honest and specific about their reservations. • Using your goals vs. your anxiety as you guide for how much to insist on when you hear their reservations 	<ul style="list-style-type: none"> • Accepting the team's reservations as productive, given their natural anxiety. • Acknowledging their reservations fully, whether or not you are influenced by them to change expectations

By now, you may be getting the picture that leadership maturity, and the skills of Leading with Backbone and Heart are at the center of all the leadership practices in the Leadership Alignment Cycle, including getting your leadership aligned with your vision. Having a great discussion about your vision is not enough to resolve all the reservations, tradeoffs, and pressures your team will experience about whatever disruption the new vision creates. You need to know where you stand on those tradeoffs – and ***be explicit about them with your team*** – so there are no surprises, disappointments and frustrations down the road. It takes both resolve and engagement to address real reservations, and the practice of getting your team completely committed is a crucial first step in getting your whole organization aligned.

Food for Thought (for leading with backbone):

Many leaders say, “I really shouldn’t have to work through the team’s reservations and insist so explicitly with them. They are leaders themselves - *and adults!* And they already know that failure is not an option.” When you don’t set clear expectations and know what your team’s true challenges are, then you avoid the challenge of being insistent in spite of their reservations and disagreement. The secret is this: your conviction can be a very powerful force to mobilize your team to reach their potential in ways they never knew they could.

Food for Thought (for leading with heart):

In the course of getting your team aligned, it is important to show your team members how you understand them, how you are influenced by them, and that you acknowledge whatever disruption, anxiety, and frustration they experience in facing the challenges of this new vision. It is one of the most effective bonding actions that a leader can take with a team - to let them know how they have affected your thinking, perspective, and decisions, as well as how they are being affected by your resolve to challenge them.

LEADERSHIP TEAM ALIGNMENT SELF-ASSESSMENT

How would you rate the quality of your team’s current alignment? These questions match the descriptions on the previous page. To be a “6” you would know with certainty where your team stands and they would know with certainty what you are insisting on, as well as how you will support them in meeting your expectations.

1) **CLARITY**

6 = I make sure my team understands my leadership vision, or decision about plans or change.

1 2 3 4 5 6

2) **REACTIONS**

6 = I make sure I **understand** my team’s real reactions to my leadership vision or decision about plans or change.

1 2 3 4 5 6

3) **COMMITMENT**

6 = I expect people to commit to decisions they disagree with when it’s in the best interest of the overall decision or vision.

1 2 3 4 5 6

4) **BACKBONE AND HEART**

6 = I **balance resolve and flexibility** in getting my team’s commitment.

1 2 3 4 5 6

5) **INSISTENCE**

6 = I **insist** on my team’s commitment to deliver results.

1 2 3 4 5 6

RESULTS OF SELF-ASSESSMENT

If you answered --

Mostly 1s and 2s on all questions:

Kudos to you for your honesty. But you're in danger of failure. If you have a leadership vision, people won't commit if they don't fully understand it, have unaddressed resistance to it, or aren't clear about the consequences of not committing. Prioritize using this tool to get your team committed to your vision. Results and satisfaction will follow.

Mostly 3s and 4s on all questions:

Okay, so you're not consistent in this area, or have some parts of this practice in place. It's good that you know it. Become a keen observer of yourself -- what you do (and don't) in terms of engaging your team in getting committed to your vision. This tool will show you ways to help make immediate improvement.

Mostly 5s and 6s on all questions:

This is great. You are mostly able to get your team truly aligned with your vision. You may want to spend a little extra time ensuring you have all the bases covered. There may be useful steps or tips in the tool that will help you enhance your alignment even more.

All 6s on all questions:

Congratulations on having a major building block of effective leadership in place. You deserve a ticker tape parade! What, no one's throwing one for you? Note to self: buy some confetti.

Now that you have assessed where you are, you can either enjoy that you already have an aligned team, or fill in what you are missing. Remember that this alignment includes "leading with backbone and heart" as an essential ingredient. This will support you in the future, as you will need to lead your team through several more leadership practices.

LEADERSHIP STATEMENT WORKSHEET

This worksheet is to help you clarify the content of the leadership statement you will make to your team clarifying your leadership goals and expectations.

THESE QUESTIONS WILL HELP YOU GET READY TO PRESENT YOUR LEADERSHIP VISION TO YOUR TEAM:

- 1 Describe the business imperative and necessary culture shift over the next quarter, 6 months, or year. Specify your goals and the main thing that needs to be accomplished in this timeframe.
- 2 Describe the business results your team needs to achieve to be successful.
- 3 Describe the business results and key leader-team and team interactions your team needs to exercise to succeed.

4 Clarify the consequences to the team and organization of choosing/choosing not to align with the plan, decision, or change.

5 Clarify how you will demonstrate your commitment to this vision, project, change, or plan.

THESE QUESTIONS WILL HELP YOU GET READY TO RESPOND TO YOUR TEAM'S REACTIONS:

6 What reactions (especially concerns) do you imagine the team will have to the goals and outcomes you need to achieve, especially those reactions that won't change even when they hear the reasons why?

7 What do you imagine will prevent them from committing to your vision, goals, or expectations?

8 What resistance do you imagine they will have to the way you plan to use your authority during this alignment? Will they want more or less decisiveness from you? How might they challenge you during the interactions?

9 How do you imagine you might be thrown off your plan or shoot yourself in the foot during the interactions?

10 How will you respond if someone hedges or refuses to make a commitment?

11 What might stop you from being as insistent or inviting as you need to be to be successful?

PRODUCTS AND SERVICES

We offer a range of resources and services to support you in developing your capacity and skill in achieving Leadership Team Alignment.

TOOL FOR YOUR USE

- This “Leadership Team Alignment” tool from the website store deepens your understanding of what is required to get a team aligned and what it takes from you to lead it successfully, so that your team is committed to deliver the vision for your organization.

TOOL FOR YOUR ORGANIZATION

- Get the tool for the Leadership Team Alignment practice for your whole organization, so that you can get everyone aligned, as well as invested to understand, use, and improve the practice of creating a leadership vision.

1-1 CONSULTATION

- We provide individual consultation and coaching to help you achieve Leadership Team Alignment.

TEAM COACHING

- We can help you and your team create Leadership Team Alignment with any significant decision, strategic plan, or leadership vision. This is especially productive when it affects a particularly critical strategic priority, so that you and your team ensure the successful execution of that priority.
- We provide consultation and coaching for you and your team to develop the skill and capacity to implement the entire Leadership Cycle more effectively to make dramatic progress on all your strategic priorities.

This alignment model was created for your benefit and the benefit of your teams. We look forward to hearing your successes and challenges and welcome input on how we can jointly make improvements to better support you. Your feedback will help us maximize the effectiveness of our model, develop best practices, and refine our offer to help you lead

BIOS

increased alignment on decisions across your enterprise.

Roger Taylor



Roger Taylor has been studying leadership and coaching leadership teams for almost 30 years. As a strategic leadership consultant, he has coached at all organizational levels—from the C-Suite and Executive teams to front line work groups – in organizations across corporate and public sectors, including Fortune 500 and 100 companies.

Roger has extensive experience with large-scale organizational learning and leadership development programs; consulting and live-action coaching for intact executives leadership teams, facilitating strategic alignment and cross-functional coordination, change management, intense conflict resolution, and building cultures of performance, accountability, and emotional resilience.

He focuses on developing leadership maturity, organization alignment, and outstanding results. Roger’s specialty is working with leaders to prepare for and succeed in live business situations where cultural dynamics threaten true progress.

He taught graduate-level leadership, consulting, and coaching at the Leadership Institute of Seattle, and has created numerous models on leadership and coaching.

Mary Beth O’Neill



For over 25 years Mary Beth has coached a range of leaders, from CEOs, to senior vice presidents, directors, and senior managers, including those in Fortune 100 companies. She works with executives and their teams as well as 1-1 with leaders. Her passion and specialty is to help clients leverage their interactions with their teams to produce bottom line business results.

She leads the Executive Coach Training Series for experienced executive coaches, organization consultants, and HR professionals. Mary Beth also trains, coaches, and consults with internal OD/HR departments who are developing coaching cadres for their organizations and want to apply a consistently systemic coaching approach with their internal executive clients.

She has been a graduate faculty member for 23 years in the master’s program in Leadership and Organization Development at the Leadership Institute of Seattle (LIOS), at Saybrook University.

Mary Beth’s book, *Executive Coaching with Backbone and Heart*, is a classic in the field and a textbook in many coaching schools. It has been translated into 5 languages.