

Guiding Participants Through the Align Report

- **What it Is.**
- **What it Isn't.**
- **How to Walk Through a Team Meeting.**
- **The Outcome**



Guiding Participants Through Align

Areas of Discussion & Key Points of Perspective

When you have received your Align report you'll notice that we've highlighted two primary areas:

- **Top Misaligned Drivers** - where participants have a wide range of responses.
- **Top Drivers Contributing to the Value Gap** - as an aggregate of participant responses.
(NOTE: It's recommended that you explain Value Drivers in the following manner: "*While all Drivers are important, these Drivers need the most attention and working on them will contribute the most to the value of the company.*")

These two areas may not match, and in many cases they won't. As an advisor, it's up to you to work with the business owner(s) to see what they want to tackle first before heading into your team meeting.

As you discuss the Drivers you'll usually find that misalignment is the result of a lack of communication and understanding between team members. Clearing this up goes a long way toward gaining cooperation and faster implementation going forward.

PURPOSE:

The purpose of the Align Exercise is to:

- Allow team members to have input into business initiatives, and therefore own the solution. It's been proven that employees who develop this sense of purpose are more likely to consider this a priority and push to get things done. (I.E. They become more productive.)
- Help members collaborate. It takes multiple insights from multiple people, and then as you move through the exercise multiple members should work together to foster cooperation and communication.
- It allows you to get to know key players in the organization, develop trust, and it eliminates the "why" when you ask for reports, input or explanations regarding thoughts around a driver. If you are a financial advisor, it also opens the door to multiple financial planning opportunities with the highly compensated personnel within the business.
- Given all of this, companies with aligned teams are more productive and profitable. Employees therefore feel like they are important and job satisfaction goes up. It good for everyone.

STEPS:

Team alignment is not a one and done exercise. It's unlikely you'll settle all issues, have all the knowledge you need, and get people used to collaborating when before this they have not, all in one session.

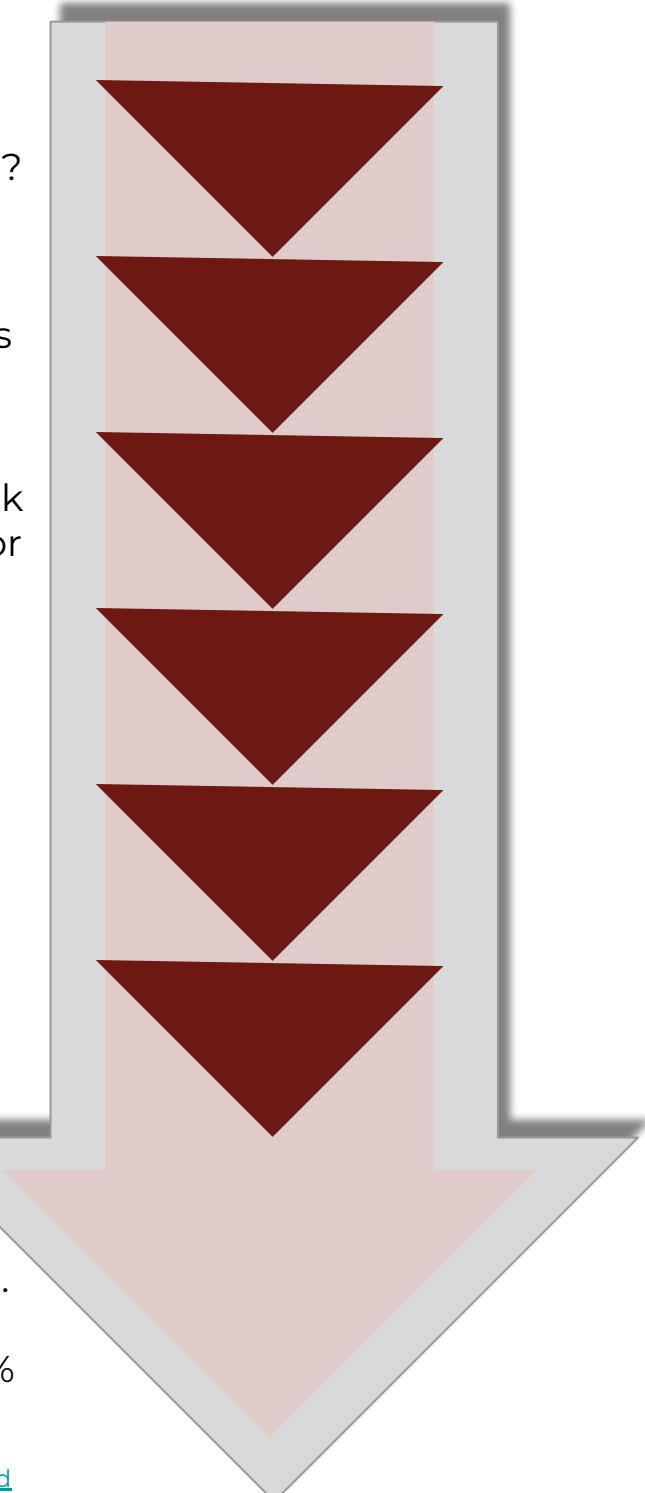
Therefore the goal of each meeting, perhaps every two weeks, is to advance activity within the important drivers and then report progress back to the group. Keep the ball moving. Use the Team Alignment Exercise Worksheets to guide your ever-deepening activity in the drivers and collaborative business planning.

Each driver has its own worksheet. (See attached pages.) Start at the top and simply ask the questions. Let everyone contribute to the discussion. Take notes, come to a consensus and move to the next set of questions. Use Workbook with individuals or teams to determine what needs to be learned next in each driver. Keep the assignment and due dates up to date on the last pages.

Welcome to our team alignment exercise. Our goal is to optimize key areas of our business by gathering your insights and collaborating effectively. We'll identify top priority value drivers, explore what needs to be done, and determine how to work together to achieve our objectives.

A few ground rules: 1) This is an open forum. All opinions are valuable, so keep an open mind as we come to a consensus. 2) Feel free to contribute and ask questions without judgement. We're all trying to understand and move forward.

GENERAL GAPS	Why is it that this driver rose to the top? What's missing? What's wrong?
REALIZED BENEFITS	What would be the benefit to the business and you if this driver was best in class?
VISION, GOALS	What would being the best in your industry look like? What's our vision or goal?
RESOURCES, KNOWLEDGE	What would we need to know? What resources are needed? What are roadblocks? Tasks?
COLLABORATION	Who needs to work together to make this happen?
ACTION	What needs to be done next? By whom?
WHY THIS MATTERS	<ul style="list-style-type: none">• It allows everyone to have input.• We all “own” the solution.• Aligned teams are 14% more productive¹ and 21% more profitable².





DRIVER:

1. General Gaps: What's Good About, and What's the Problem, With This Driver? Why is this a Common Concern?

2. What Are the Benefits if This Driver was Optimized for Performance? What Would it do for the Business and You?

3. Define the Vision or Goal? To be Best in Class, What Does this Need to Look Like?

4. What do We Need to Know? What Are the Roadblocks? What Resources Are Needed?

INDUSTRY:

COMPETITION:

INTERNALLY:

5. Who Needs to Work Together to Make This Happen? (Roles, People, Outsiders?)

6. What are First Steps? What Needs to be Done Next?



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Next Steps Worksheet

Driver	Assigned to	Due Date

Action Items	Notes

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Driver	Assigned to	Due Date

Action Items	Notes

Next Steps Worksheet

Driver	Assigned to	Due Date

Action Items	Notes

Driver	Assigned to	Due Date

Action Items	Notes

Driver	Assigned to	Due Date

Action Items	Notes

Driver	Assigned to	Due Date

Action Items	Notes