

Effective Strategic Alignment

Anticipating Strategy to Execution Impact

Abstract

The Importance of Alignment:

Organizations today are pursuing approaches to connect what is happening in their external environments (the organization environment) and the impact on their capability to deliver products and services to customers. A *key* approach is to locate, identify hidden patterns and, tease out issues that impact successful direction and execution. Alignment is much more than documenting strategies, environment trends or status of execution. It requires linking these movements together for a more reliable plan of execution.

Each organization is trying to find an advantage over its competitors, to improve operational performance or just to survive some rapid change in their environment. This explosion of interest in alignment poses a challenge to managers for effectively make sense of what the issues are and how effectively they manage transformation.

“The greatest danger in times of turbulence is not the turbulence – it is to act with yesterday’s logic.”
– [Peter Drucker](#)

Issue: What is going on outside the organization that is important?

Alignment today is done piecemeal without linking the various organization structures and capabilities together for better insights. The linkage is important in responding to change and threats to survival. It is one thing to analyze customer preferences and behavior and another to assess the impact on strategy, tactics, and operations. The same thinking applies to technology change and operational changes but in reverse.

Change inside the organization and external to it must be assessed. Effective and productive managers should have the knowledge and skills to apply analytics using a systematic and structured method for alignment.

Solution: Alignment to Assess Impact on Execution.

Managers and professionals should prepare and assess coming changes. They should understand what to expect from applying alignment techniques. They should assess future trends and anticipate execution impact. This course is key for senior managers, strategic planners, marketing analysts, data analysts and architects, planning managers, process analysts.

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Day One

Theme: The Value of Alignment

Organization alignment is about what structure you need for success considering the linkage alignment from external issues to execution. Alignment is a step beyond analysis of financials or quantitative factors. Those are used to help identify the purpose of alignment such as improving profits, increasing the number of products, or creating a higher quality service.

Section 1: The Value of Organizational Alignment

- What is alignment?
- Why is it important?
- The value proposition of alignment
- Management productivity and value
- Managing the scope of alignment

Video and Discussion – What is Alignment?



Section 2: Defining Perspectives of the Organization

- Why four perspectives?
- The external environment – what is impacting the organization?
- The strategic view – what direction should we take?
- The Tactical view – what structure works?
- Operational perspective – how do we deliver results?
- Gathering alignment data

Demo and Discussion – Defining Perspectives

Section 3: Linking the Perspectives

- What do we mean by linkage?
- How does it work?
- The value of linkage
- Good places to start alignment.

Exercise – Listing External Influences



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Day Two

Theme: Connecting the Organization Environment to Strategy

Describing, linking, and analyzing the external and strategic perspective has value in setting the direction of the organization that drives tactics and execution. Management must integrate what is going on in the environment with what strategies and objectives are needed to drive the organization forward. Linking these two perspectives is the starting point for this effort.

Section 4: The organization environment – Evaluating external influences

- Key issues with strategy alignment
- Planning Environment/Strategy perspectives for alignment:
- What are external influences?
- Using PESTLE-MB to identify influences.
- Describing the impact of external influences

Demo and Discussion – Ranking External Influences



Section 5: Setting Direction – The strategic view.

- What defines the strategic perspective?
- What core strategic components should you use?
 - Strategies, goals, objectives, initiatives, innovations, risks, opportunities
- The role of management models like:
 - Balanced scorecard, value chain, red/blue ocean etc.
- Describing the impact and value of the strategic perspective
- Ranking strategic options with risk/yield factors

Demonstration – Strategic Risk Assessment

Section 6: Aligning strategies with the environment.

- How do you link external influences with strategies?
- Where do AI and machine learn fit?
- What outcome are you looking for with his linkage?
- Inferencing impact
- Finding hidden impacts
- Focusing on potential high impact linkages

Interactive Demonstration – Strategic Impact Analysis



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Day Three

Theme: Connecting Strategy to Tactics- Organizational Impact

Tactics has not been a focus of current automation and improvement efforts especially as regards leveraging middle management. So, this is a rich opportunity for improvement especially as it deals with making decisions. The second alignment stage links the strategic perspective with the tactical perspective. There is a limited amount of material available for the analysis of organization tactics so the analysis effort may contain initial investigation and definition.

Section 7: Preparing the Strategic Perspective for Linkage

- Using material from environment to strategy
- Original sourcing of strategy material
- Applying strategic analytics
- Interpreting the analytic results
- Decisions from strategy

Interactive Demonstration – Strategic Analytics



Section 8: Preparing the Tactical Perspective

- Identifying tactical categories for analysis
- Sourcing tactical material
- Applying analytics to tactical material
- Filtering and focusing on organization need.
- Tactical decision making

Exercise – Tactical Alignment Categories

Section 9: Linking the Perspectives

- Filtering Strategic material
- Filtering Tactical material
- Defining the linkage approach
- Planning the linkage relationships
- Interpreting the results

Interactive Demonstration and Discussion – A Linkage Analysis



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Day Four

Theme: Aligning Tactics with Execution

Operations are the major focus of automation and improvement efforts. Especially when interest is in hyper automation and management productivity. There is a wealth of material creating an issue of filtering alignment material. The third stage links the tactical perspective with the operational perspective. Unique analytics provide for filtering to a sharp focus on improvement opportunities.

Section 10: The Tactical Perspective

- Using pre-defined tactical categories
- Sourcing new tactical material
- Applying select analytics to tactical material.
- Filtering tactics and focusing on organization needs
- Tactical ranking for impact and priority

Demo & Discussion – Tactical Ranking for Priority



Section 11: Operations - The Edge of the Organization - Delivering value to customers

- The edge of the organization, where the customers are
- What should you know about them?
- Selecting operational categories
- Applying analytics to execution
 - Neural nets and execution performance
 - Statistical techniques
 - Machine learning

Exercise – Selecting Operational Categories

Section 12: Linking Tactics and Operations

- Filtering tactical categories
- Filtering operational categories
 - Capabilities, values streams, organizations, locations
- Preparing a linkage relationship matrix
- Example - Consolidating organizations
- Impact analysis with AI

Demo & Discussion – Using Neural Nets to assess process performance.



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Day Five

Theme: Connecting the Dots – End to End Alignment

Eventually an organization must be able to trace changes from top to bottom and back. The degree of detail and scope depend on the change situation. The cost of doing alignment follows the scope. Alignment is designed as an incremental approach. As a result, incremental accumulation of value is achieved over time. The overall framework ties the parts together. Hence the cost can be spread over time and updated as needed when change situations call for it. When all parts are executed, it is called end-to-end alignment.

Section 13: Putting it all together – End to End alignment.

- The idea of end-to-end environment to operations alignment
- Strategy to execution alignment
- Identifying key linkages
- Focusing on improvement opportunities
- The key outcomes from strategy to execution alignment

Demonstration – Strategy to execution impact analysis



Section 14: Analytics Linking Multiple Perspectives

- What is multi – stage linkage?
- Filtering for results
- Two stage linkage examples
- Three stage linkage examples
- Four stage linkage – the end-to-end approach

Exercise – Which Linkage is most important?

Section 15: At the End of the Day what do you Have?

- Revisiting the purpose and goal of alignment
- Interpreting the results of alignment
- Thinking about the future
- Defining future states of the organization
- Comparing As-Is with To Be structures.

Questions and Wrap



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Learning Objectives

Expected Learning Outcomes (what they will learn):

- Explain the different uses and value of alignment in strategic thinking today.
- Use the alignment methods to improve organization effectiveness.
- Understand the techniques used for the diverse types of alignment strategy analysis.
- Describe how analytics provide capability to focus alignment insight.
- Explain the technologies and tools available for assessing alignment.
- Interpret how alignment methods can help management plan.
- Select alignment techniques for that promote management productivity.
- Understand the limits of alignment analytics.
- Interpret and explain the value of end-to-end business alignment
- Suggest usage opportunities for alignment such as linking to management models such as SWOT, Balanced Scorecard, and others