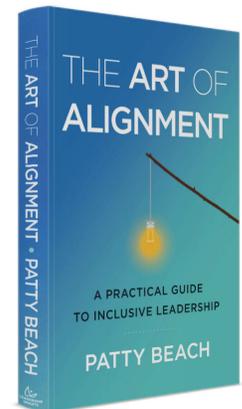


The Art of Alignment

A Practical Guide to Inclusive Leadership

by **Patty Beach**



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THE SUMMARY IN BRIEF

Leadership can often seem like an uphill battle—even when you’re powered by an idea that’s unmistakably good. The problem? Most leaders just don’t know how to align their people behind an idea and give it the momentum to get it up and over that hell. But if you were a leader who could get everyone on the same page and moving together, on any project or goal?

Whether you’re at the top or bottom of an organization, Patty Beach’s *The Art of Alignment* is all about helping business leaders move projects, initiatives, strategies, and their overall mission and vision forward. Here you’ll find a pragmatic approach to introducing new ideas to a group, getting them to agree on a path forward, and commit to carrying their weight in getting that idea across the finish line. Practical tools include a guide to where alignment and business intersect as well as a full strategy for introducing alignment at your organization through targeted meetings and careful approaches with your people.

IN THIS SUMMARY, YOU WILL LEARN:

- The true power of alignment and why it’s so essential (yet undervalued) in business.
- The core principles of alignment, including the iterative co-creation principle, the Shuva principle, and the versatility principle.
- The 4 steps to alignment.
- How to prepare and run alignment meetings.

Alignment and Business

All businesses require alignment because groups of all kinds, including leadership teams, boards, employees, customers, vendors, and investors achieve more when aligned. Alignment isn't just about getting groups to agree. It's required whenever any two people come together to make a plan, whether they're business partners, a boss and direct report, a consultant and client, or two colleagues working together. Imagine how much you could accomplish between all these parties. Alignment drives growth and scalability in business. To scale and grow, you have to get others to do things, and they, in turn, have to get others to do things, and so on.

Alignment and Leadership

Fostering alignment is the critical skill that separates dreamers from leaders who get things done. To reinforce this idea, it's important to clarify how leadership and alignment are linked. The most essential component of leadership is vision. Without a vision of a future better than the past, there is no leadership. Instead, you have the status quo—or worse, devolution. Leadership is the art and science of inspiring committed and aligned action towards a clear vision. Commitment trumps compliance every time.

The Iterative Co-Creation Principle

By consulting as many people as you can to help shape your ideas, you create a brain trust. By including people from different parts of the system, you gain many perspectives on the problem like facets of a prism. When a decision is informed by those it impacts, it is more likely to be sound and well-received. Another reason to not only consult others but to invite them to co-create with you? Ownership. People don't take down what they build, so including stakeholders in shaping solutions avoids the future destruction of your most recent resolution.

The SHUVA Principle

SHUVA is an acronym that describes a basic need universal to all humans: the need to be Seen, Heard, Understood, Valued, and Appreciated. When you feel seen, heard, understood, valued, and appreciated, it feels terrific. You can be yourself and express yourself. SHUVA is the path to true alignment because all ideas, including doubts and reservations, are welcome. When you feel SHUVA from a person or group, you're more willing to expand the extra energy required to hash out areas of misalignment. Keep in mind: you don't have to agree with what somebody says to offer them SHUVA.

The Versatility Principle

The Principle of Versatility unleashes the power of masculine and feminine energy by:

- Factoring in facts and feelings into conversations.
- Allowing people to build on each other's ideas.
- Being inclusive and selective about who to engage in the decision-making process.
- Respecting lines of authority while empowering people to reach across them.
- Alternating push and pull energy to move ideas from me to we.

With the Principle of Versatility, you don't end up with forced or fake alignment; you achieve true alignment.

The 4 Steps and 5 Cs of Alignment

Leading divergent thinking is easy; it's getting the group to converge that's hard. Instead of letting the conversation go unstructured, use a standard process to efficiently funnel ideas from divergence to convergence. That process is the 4 Steps of Alignment.

Step 1: Propose

The act of making a proposal shifts the conversation from uncommitted to committed and from divergent to convergent thinking. Just be careful not to go too far. Proposals are not declarations. When it comes to alignment, declarations are deadly because they leave no room for iterative co-creation. They set up challenges and power struggles and are off-putting. When presenting a proposal, you're laying the groundwork for greater alignment even if the process to get there involves lots of potential roadblocks.

Step 2: Probe

Instead of probing for responses to your proposal in a random way, collect feedback using four of the five Cs: Clarifications, Compliments, Concerns, and Changes, in that exact order. First, ask clarifying questions. Next encourage compliments about the proposal. Then you are ready to explore concerns and changes that can resolve the concerns. Finally, test for the last C- commitment.

Here are some tips about the Probe step:

The audience will want to jump ahead. Don't let that happen; instead, hold the line and make sure they follow the Cs

in the right order.

Give participants a notepad to capture what they are thinking so they can hold on to ideas and share them when the right time comes.

Make sure someone is transcribing all comments.

Step 3: Re-Propose

Your re-proposal should include the ideas that most resonated with the group, not everything that anyone expressed. Lean toward those ideas shared by decision-makers, informed experts, and those responsible for implementing solutions. Give the preferences of these key stakeholders more weight than those of people the final decision only casually impacts. If you don't follow this step, you risk having team members waiting until they get to the water cooler to deep-six all your hard work. Training your team to speak up is one of the big benefits of the 4 Steps of Alignment.

Step 4: Close

All too often, we neglect to Close properly. We kick the can down the road, postponing decisions to a later date. This can be a big waste of time and creates a perpetual churn. So, finalize your agreement by declaring a formal close; that doesn't mean the topic can never be reopened, but it does signal an intent to commit and move into action. You've reached the Close when all parties have reached the desired level of agreement. Resist the temptation to continue debating until everyone is 100 percent satisfied unless you really need that level of agreement.

Preparation for Alignment Sessions

Defining the Players

One thing that can be hard to determine is who to include on your path to alignment. To help you figure that out, map all stakeholders and consider the best approaches to including them. Before deciding who to include, step back and map out all parties who will be impacted by the change you need alignment around. These are your stakeholders.

Alignment Meeting Logistics

When it comes to planning alignment meetings, it is valuable to follow the Principle of Versatility by balancing masculine and feminine energies. To run a meeting in a versatile way, use this MSF— design tight and hang loose. For example, plan out an agenda to the minute and bring a

timer to reinforce it, but also plan for time to let the conversation roll when needed.

Meeting Roles

If your meeting includes more than six people, it is very helpful to assign roles. Not only does doing so take the load off of you, it provides an opportunity for others to be more engaged and active in the meeting. The top roles to consider for your meetings are Leader, Facilitator, Scribe, and Timekeeper. IT is customary to give timekeepers a voice or vote depending on whether they are group members or decision-makers.

Issuing the Invitation

Now that you have initial considerations and logistics worked out, you are ready to issue invitations to alignment sessions. A well-worded invitation can help set expectations for participants and get their idea machines up and running before they arrive.

The Opening

A good alignment session starts with a strong opening. Take time when you open a meeting to orient everyone so that they know where the meeting is going and can fully participate. Follow this process— Clarify the purpose of the meeting, then clarify anything that may have transpired prior to the meeting that is relevant. Then review the agenda and any processes you may use, such as the 4 steps or 5 Cs. Finally, confirm that the participants are ready to start and are in agreement.

Ground Rules for Alignment

Ground rules are recommended for any meeting, but they are particularly useful when you are dealing with critical decisions. The following meeting ground rules, when followed, will go a long way toward creating psychological safety and the best conditions for alignment.

- Balance participation.
- There are no bad ideas.
- Say what you mean, just don't say it mean.
- Honor confidentiality.

Top-Down Alignment

Alignment in a multilayered organization is always challenging. Conventional wisdom says start at the top, then cascade decisions down to every level. A top-down ap-

proach to alignment has many advantages. Those at the top have the best vantage point to reconcile competing options and make best use of limited resources, have the formal authority to make changes, and hold the power of the purse needed to provide incentives.

Bottom-Up Alignment

When you don't have the power or authority to make a change, you may feel it is not your place to even suggest one. We don't believe in that. If you have an idea that can create a better future, then why hold back, even if you are at the very bottom of an organization? You just need the know-how to step outside the lines and the patience to work iteratively to bring others along. If your idea crosses organizational boundaries, you will need finesse, diplomacy, and change management skills.

Sideways Alignment

Sometimes you need alignment in a system where there is no power differential. Examples include partners in a business, working in a coalition of peers, or working with volunteers where no one is in charge. Every once in a while, I work with teams and organizations that have no hierarchy because they value equity so much that every person has an equal vote. In these cases, alignment principles and practices can keep things moving forward.

Dealing with Disruptors

When someone interferes with progress, it can be tempting to label them as a troublemaker and dismiss them. Labeling is not helpful, as it blames them for being off track and gives you an excuse to do nothing. Rather than thinking of these people as problems, think of them as valuable contributors who are

using reactive behaviors to meet their otherwise unmet needs.

Maybe You Are the Trouble

If you feel you are continually facing resistance, guess what? Your problems share a common denominator: you. Start by looking in the mirror. Ask yourself: Am I creating the problem? Whether you are or not, if you change what you are doing, you might discover a breakthrough.

Conclusion

Before truly inclusive leadership can be reached, there are some potential roadblocks that must be addressed—namely: disruptors. These disruptors are individuals who keep you from obtaining true alignment and inclusive leadership. Adopt the 'coach, coach, coach, change' framework. If a person doesn't shift out of their disruptive behavior after being coached three times, they will probably need to be changed out for someone who can change.

But what if you are the disruptor? Seeing the problems and roadblocks within yourself isn't easy and requires a special brand of self-awareness, but the ability to let go of your vices and bad leadership habits is an important step on the path to alignment.

Inclusive leadership takes time, but if you practice the principles in this book, you can get any group of any size to back up good ideas and eliminate bad ones. Big ideas require a lot of preparation, especially when you are working across organizational boundaries. As you think things through, be sure to always be mindful of the whole system and lines of authority.



Patty Beach is the founder of LeadershipSmarts, a consulting firm that transforms managers into creative leaders that build “teams on fire that never burn out.” Her approach to leadership development evolved over twenty years of designing award-winning programs for companies, universities, nonprofits, and government agencies. Before earning a master's degree in organizational development from Pepperdine University, and becoming an ICF Master Certified Coach, Patty was a geologist and manager leading initiatives in new technology and emerging markets in the energy industry.

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