The Leader's Guide to
REACHING ALIGNMENT WITH YOUR GROUP

Leaders seek alignment when defining goals, making decisions, or formulating strategic plans. When it's important to have everyone in the group on board with the outcome, working through this series of deliberate and thoughtful questions can help achieve group alignment.

Use this template to help you guide the discussion.
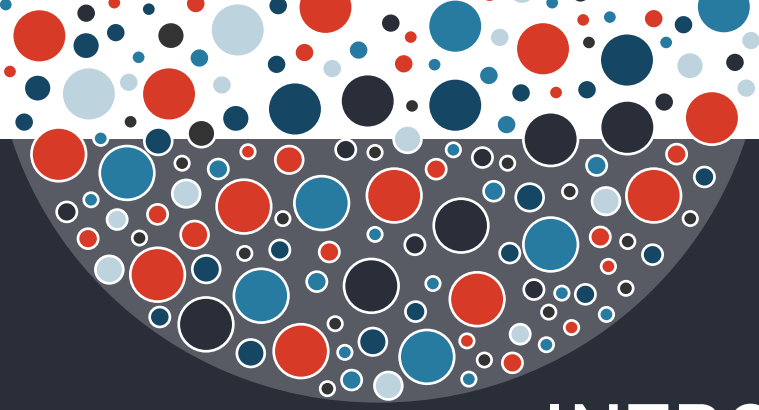
Best For

Leaders seeking alignment with a decision or proposal.

Established teams that value everyone being aligned and engaged.

Contents

INTRODUCTION

All teams realize that when everyone is aligned with the teams direction, initiatives, goals and actions, another level of performance occurs.

There are two instances when alignment is important.

The first instance is occurs when closing or wrapping up a conversation. Checking for alignment is a key step to ensure that everyone in the conversation is in agreement about what has been decided and what happens next. The simple form of the question looks like this:

> Is everyone okay with where we ended up on this topic?

The second instance where alignment is important is the focus of this template. **Alignment is one of the key conversational processes that supervisors and managers must master.**

It's great when we have the natural alignment that occurs when people are deeply involved in the creation of something.

The saying goes: "people rarely destroy that which they created." This idea is at the heart of participative management and for some decisions, this kind of comprehensive engagement is the best approach.

Practically, however, having everyone involved in every decision and building everything from the bottom up is not realistic. Still, we often need everyone on board and aligned with the new direction or decision, regardless of whether they were directly involved in shaping it.

People usually prefer to be aligned with management and the organization. Sure, there are a few outliers who will withhold their support because of some historical resentment, but **98 % of people want to be aligned**.

If people are not aligned, there is a often a good reason.

For example:

1. They simply do not understand or are not clear about what is being proposed. This can either be about the decision or initiative itself or the way it will be achieved.

2. They do not see the value in what is being suggested.

3. There is something in their way that, if it could be addressed, they would sign up. (examples: they may not have enough time, the proposal puts something else they care about at risk, etc.)

4. There is something missing that, if provided, would make a difference in their support. (example: extra resources)
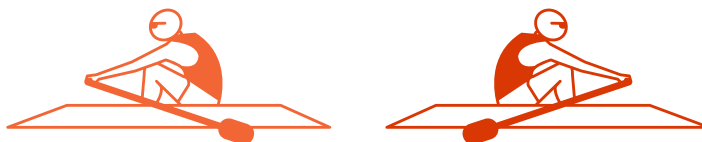
Often, people are not quite sure why they are not excited about a new program or about a decision—it just doesn't feel right.

If you can engage your group in an open conversation that is psychologically safe and where their questions and comments are not resisted but truly heard, they will tell you what you need to change or add to get their support.

Alignment is crucial to execution. Going deliberately and thoughtfully through this series of questions will reveal what needs to be addressed to reach alignment.

The Process

ABOUT
The online template organizes these questions into a 4-part agenda. **It's fine, however, to modify the agenda or have an informal conversation that is informed by or based on the questions..**

The key to this conversation is working through the questions, listening intently, and responding thoughtfully to what you hear and learn.

① What I'd like to do

② Questions

- What questions do you have?

- Is this clear? Does it make sense?

③ Feedback

- Is this worth doing? Do you see the value associated with this goal, project or idea?

- Is there anything in the way of your supporting this?

- Is there anything missing that would help?

④ Review and Next Steps

STEP-BY-STEP MEETING INSTRUCTIONS

Before the meeting

Prepare to share your proposal or plan.

You begin this conversation by explaining to the group what you'd like to do. Because your goal is to create alignment and support for your decision, be prepared to answer the questions that are likely to come up. Also, consider which parts of your proposal, if any, could be altered if necessary.

Review and update the agenda (if necessary).

If you are meeting face-to-face, you can reserve time for this conversation and simply gather people to talk. However, if you're meeting with remote participants, you may want to prepare information about your plan that you can present during the meeting.

Decide how you want to gather feedback.

Small groups can often just talk. For groups of 6 or more people, plan to ask several people for feedback directly, as some may not offer their ideas without prompting. If you anticipate several remote participants, set up a "Speaker Queue" so people can raise their hand to be recognized when they have a question or comment.

Schedule the meeting and invite your team.

During the meeting

①

What I'd like to do

Describe what you would like to do and how you intend to do it. Be clear about your intended outcomes and the approach you will use to produce those outcomes.

Then, **click "Next >"** to move on to questions.

②

Questions

After you share your idea, find out what people are thinking. Start with an open-ended question that allows them to express anything and everything and gives them a chance to direct where the conversation goes. Ask:

> What questions do you have?
>
> Is this clear? Does it make sense?

Stay with this conversation as long as they continue to ask questions or offer input.

Clarity is often a missing piece, and you want to ask about it directly. Asking whether people are clear gives them permission to say that, for whatever reason, they can't get behind what you are asking.

Once everyone agrees that they understand what you'd like to do, **click "Next >"** to go to the next item.

③

Feedback

Ask if people see the value in your idea.

People might understand what you are proposing, but if they don't see the value in doing it, they probably won't align. Ask:

> Is this worth doing? Do you see the value associated with this goal, project or idea?

3

Ask people if they have concerns. People might like your idea, but supporting it might raise a conflict for them. If they can identify their concern, you can determine whether you can address it.

Ask:

> Is there anything in the way of your supporting this?

Once you know what is in the way, ask whether anything is missing that would make a difference to alignment if it were included.

Ask:

> Is there anything missing that would help?

4

Review and Next Steps

To close the meeting, take some time to re-state and review what you heard. Then ask the group whether, if you promise to address their concerns and requests, they are now able to align with the decision or plan.

Ask each person individually:

> If we address these items, will you align with this approach?

End the meeting by acknowledging individual contributions and thanking the team as a whole for their participation.
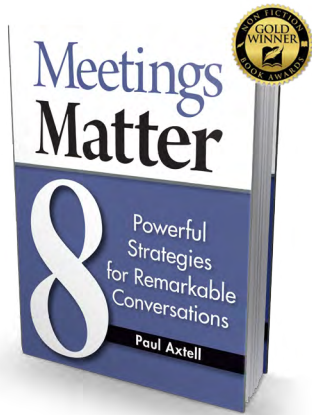
After the meeting

Send out the follow-up email, which makes sure everyone gets a summary of the discussion in their email, even if they couldn't attend the meeting.

RESOURCES FOR ACHIEVING MEETING MASTERY

On the Web

Ask Paul: Paul Axtell's Blog
http://paulaxtell.com/blog/

Books

Paul Axtell,
"Meetings Matter: 8 Powerful Strategies for
Remarkable Conversations" 2015
http://paulaxtell.com/books/meetings-matter/

Related Templates for Leaders

A Protocol for Clearing Questions and Responding
to Complaints
http://www.lucidmeetings.com/templates/paul-
clearing-protocol

Gathering Productive Feedback
http://www.lucidmeetings.com/templates/rick-
gathering-feedback

All of Paul's Lucid Meetings Templates

http://www.lucidmeetings.com/templates/designers/
paul-axtell

ABOUT THE AUTHOR

This template was designed by Paul Axtell.

With more than thirty years of experience helping organizations and individuals be more effective, Paul Axtell has honed his insights in executive offices and training programs for everyone from office staff and line workers to managers and team leaders.

A large focus of his work is how to run effective and productive meetings—to turn them from something people dread into useful, productive sessions with trackable results.

Paul is the author of two multi-award-winning books, Meetings Matter: 8 Powerful Strategies for Remarkable Conversations and Ten Powerful Things to Say to Your Kids: Creating the Relationship You Want with the Most Important People in Your Life.

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