Aligning with others

Introduction

This is a tool for people leading or working in matrix, virtual or cross-functional teams to enable them to align their 'horizontal' team goals (goals that cut across the organization) with their 'vertical' functional or local goals and to identify any gaps, overlaps or prioritization issues.

It is very common for people in this situation to have business, functional, local, global and team goals.

By mapping the goals of the team as a whole and the individuals within it we can identify whether functional goals support the cross-functional, business or global team goals.

We can also see if some supporting goals are missing or duplicated and where this team fits into the priorities of individuals who are working on multiple teams.

The tool

This simple but effective tool came from a German matrix team manager in the healthcare industry who attended one of our training programs.

His organization had introduced matrix brand teams that worked across functions. He led a cross-functional team responsible for the performance of a cancer drug within the country.

In the past goals had been set by the functions and often these 'vertical goals' were not aligned with the 'horizontal' goals for the overall performance of the matrix team.

Some of the team members were permanent, but some only spent between 10% and 50% of their time dedicated to the team. Others were 'on demand' and attended when needed.

He created a large wall chart with the team goals along the left and columns for each of the functional representatives along the top. He used this to create a map of the goals for all of the individuals and how these were aligned to the overall goals of the team.

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The tool *continued*

	Function or individual #1	Function or individual #2	Function or individual #3	Function or individual #4
Team goal #1 My objectives and activities that support the delivery of this goal				
Team goal #2 My objectives and activities that support the delivery of this goal				
Team goal #3 My objectives and activities that support the delivery of this goal				
Team goal #4 My objectives and activities that support the delivery of this goal				
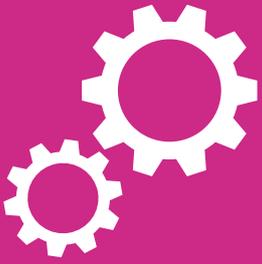
The process

1. The team or activity leader creates a grid as above and populates the left column with the key goals of the matrix team or project. In this case these were about the overall performance of the drug in the country and the key strategic goals that the team needed to reach. Along the top are the names and functions of the other members of the team.

2. Underneath the list of team priorities, create space for individuals to record other goals and activities that are from their function or other teams they are a member of.

3. Each individual on the team (who in this example represented their functions), completes the boxes with their goals and activities that are aligned to and supporting each of the key matrix team goals. In this example their functional goals included running clinical studies, engaging with stakeholders, recruitment etc. This clearly identifies any gaps or overlaps in support of the key goals of the cross-functional team. There will not necessarily be supporting activity from every function for every team goal.

4. The final rows allow people to share activities and goals that they are committed to but that are not aligned to this particular virtual team. These are typically those activities in support of other teams that the individual may be a member of or their purely functional goals. This can be useful to help identify where this team fits into the overall priorities of an individual who works on multiple teams. It can also give an insight into the overall workload of individuals.

5. Get each individual to present their column. From the content and style of their delivery you will get an understanding of each individual's commitment and clarity around the team goals.
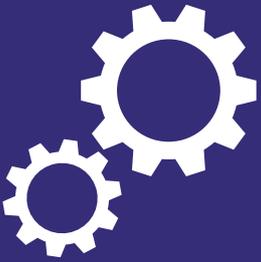
The process *continued*

When you have completed this exercise, review the grid as a team and discuss the following:

> **Gaps** – where necessary supporting goals from the functions are missing.

> **Overlaps** – where individuals are replicating work.

> **Misalignment** – where goals have mistakenly been included that do not match the team goals or priorities. Sometimes these will be misunderstandings or legacy activities from the old way of working that are no longer necessary.

> **Prioritization** – if individuals have large numbers of goals outside of those supporting this team, where does this team fit within their priorities?

> **Resourcing** – can you achieve these goals with the resources available?

Conclusion

This is a simple but useful tool for creating alignment and making issues visible.

It can be created as a document and circulated to people in different locations or used in a webinar, or it can be completed live with post-it notes as an alignment exercise in goal setting or at the beginning of the year or project kick-off meeting.

If you identify challenges in the analysis then you need to either resolve it within the team or discuss this with both 'legs' of the matrix concerned.