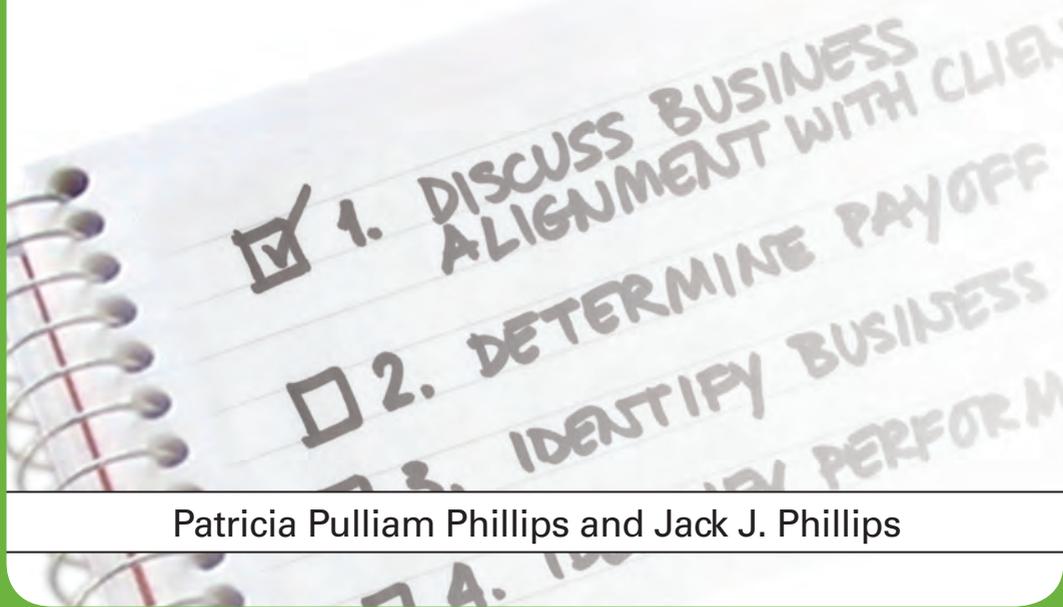


# 10 STEPS

## TO SUCCESSFUL

# [ Business Alignment ]



Patricia Pulliam Phillips and Jack J. Phillips

**1 0   S T E P S   T O**

Successful Business  
Alignment

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1 0   S T E P S   T O

# Successful Business Alignment



Patricia Pulliam Phillips & Jack J. Phillips



ROI INSTITUTE™

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# 1 0   S T E P S   T O   S U C C E S S

Let's face it, most people spend their days in chaotic, fast-paced, time- and resource-strained organizations. Finding time for just one more project, assignment, or even learning opportunity—no matter how career enhancing or useful—is difficult to imagine. The *10 Steps* series is designed for today's busy professional who needs advice and guidance on a wide array of topics ranging from project management to people management, from business strategy to decision making and time management, from leading effective meetings to researching and creating a compelling presentation. Each book in this ASTD series promises to take its readers on a journey to solid understanding, with practical application the ultimate destination. This is truly a just-tell-me-what-to-do-now series. You will find action-driven language teamed with examples, worksheets, case studies, and tools to help you quickly implement the right steps and chart a path to your own success. The *10 Steps* series will appeal to a broad business audience from middle managers to upper-level management. Workplace learning and human resource professionals, along with other professionals seeking to improve their value proposition in their organizations, will find these books a great resource.

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# P R E F A C E

“Are your programs aligned with the organization? Are they connected to the business? Are you helping to meet our business goals? Is this project necessary? What’s your contribution?” These and other similar questions from project sponsors bring into focus the issue of creating business alignment. A key issue in almost any type of project, alignment appears elusive, but can be routinely achieved and sustained for long periods of time. This book takes a fresh perspective on this challenging issue and shows how alignment is positioned early in the creation of projects, programs, and functions. It illustrates how to sustain alignment over a period of time and validate projects routinely to make sure that business alignment has been achieved.

## The Need for This Book

Business analysts, professionals, managers, and executives need an uncomplicated reference to learn how to make alignment work. In 10 easy steps, this book shows how to align a program at the beginning, how to establish and support objectives to keep the focus on specific business measures throughout the life of the program,

and how to validate that alignment has occurred as the influences from other factors are separated from the effects of the program.

You don't have to look far to find studies that reveal executive concern for business alignment. When the success or failure of projects or programs is explored, the results often boil down to the presence or lack of alignment. The authors recently conducted a study with *Fortune 500* CEOs regarding measures of success desired by executives. The executives suggested that business contribution, notably business impact, was their number-one desired measure. The study showed that 96 percent of the CEOs wanted to see impact data, although only 8 percent stated that they currently see this type of data. In a search for key words for this study, executives provided written comments about the need for business alignment, business contributions, and business connections.

In our own work at the ROI Institute, we have examined the reasons why projects fail. Each year, we have the opportunity to be involved in approximately 800 ROI studies, and many of them lack the success desired by the project owners. In short, some 30 to 40 percent of the studies are negative. Another 30 to 40 percent are positive, but still disappointing to the client. The remainder of the studies has more room for success. The number one reason for this lack of success is a failure to align the project to the business in the beginning. This is a critical issue.

Business alignment is necessary now more than ever. The global recession has intensified the need for business results from projects and functions in organizations. At the same time, there is mystery surrounding this process. How do you connect to the business for projects, programs, or functions? For example, the leadership development function has been challenged by some executives to show its value. Is it aligned to the business? Does it help drive key business measures, such as productivity? Is it possible for leadership development to show the value? Are new leadership development projects aligned to the business when implemented?

## What This Book Will Do

Project or program managers don't always know how to connect the project to a business measure, let alone keep it focused on those measures throughout the project life cycle. While it is important to make the connection in the beginning, there is also a need to keep the focus on the business alignment through the project. At the same time, there is a need to verify that the alignment has occurred after the project is fully implemented. This is the validation that the project is indeed connected to the business and has improved one or more business measures. This particular issue, isolating the effects of the project, determines the precise contribution made by the project. This validation step is shrouded in even more mystery. This book attempts to unravel this alignment mystery in simple, rational terms, following a sequence of steps needed to generate a business connection that is CEO- and CFO-friendly.

## Acknowledgments

We wish to acknowledge three groups of individuals who have helped us produce this book. The content of this book was developed with literally hundreds of clients over a period of two decades. We first published the alignment between needs assessment and evaluation in 1994 as a concept. Since then, we've refined this tool, currently labeled, the V-Model, which forms the basis for this book. Hundreds of clients have allowed us to work with them as we established the alignment of programs in the very beginning, kept the alignment through the process with impact objectives, and validated it on the follow-up.

We owe much appreciation to ASTD for their continued support of our work. This is our fortieth book with ASTD, our outstanding publishing partners. Our relationship with ASTD began with Nancy Olson's efforts in the 1990s and continuing to the present with Justin Brusino. For a publishing partnership to endure 40 titles is amazing in these turbulent times of short-term and strained partner

relationships. We appreciate the patience and professionalism of ASTD in their quest to always be the leading provider of content in the field of human resource development.

Finally, much appreciation goes to Rachel Robinson for her excellent editing in this book. Rachel has taken on the challenge with short notice and has done an outstanding job of making this manuscript readable, enjoyable, and interesting to the audience. Thanks Rachel, for a great job. We look forward to many more publications.

***Jack and Patti Phillips, 2012***

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## Business Alignment Issues

It is difficult to have a conversation about a project, program, event, initiative, or system without discussing the subject of business alignment. Some classic questions that are often asked about business projects are:

- ◆ How will this project help our business?
- ◆ Is this aligned to our goals?
- ◆ What is the business contribution?
- ◆ How is this helping my key performance indicators?
- ◆ What is the business value of this?
- ◆ How do we know this program has contributed to the business?
- ◆ Will the results of this project appear on my quarterly report?

These and similar questions focus on the issue of aligning projects and programs to the business. Programs must be aligned to the business early in their lives, throughout the implementation, and the business alignment must be validated after the program has been fully implemented and operational. Before we begin our discussion of the “10 steps” to business alignment, this introduction

focuses on several key issues about business alignment and why it is presently a critical topic.

## Definition

Business alignment is defined in a variety of ways. One definition from Business Dictionary is: the linking of organizational goals with the employees' personal goals.

The term business alignment is also used in regards to information technology, in which case it is defined by Wikipedia as: a desired state in which a business organization is able to use technology effectively to achieve business objectives—typically improved financial performance or marketplace competitiveness.

For this book we will define business alignment as: *ensuring that a new project, program, or process is connected directly to business impact measures, usually expressed in terms such as output, quality, cost, or time.* It is important for alignment to be verified in the beginning of the project; during the life of the project, there should be constant focus on the business measures to maintain the alignment. Steps are usually taken to validate the business alignment, confirming that the project contributed to improvements in one or more important business measures. While this definition is comprehensive, it clearly describes the focus of this book.

## Types of Solutions That Need Business Alignment

Business alignment can be developed for almost every type of project. Inside the typical business organization, alignment will often be required or suggested in four major market areas: technology, quality, marketing, and human resources. In addition, projects in other support areas such as procurement, research and development, engineering, risk management, logistics, public relations, compliance, and legal should also focus on business alignment as projects

# TABLE A

## Projects Where Business Alignment Is Needed

Human Resources/Human Capital	Talent Retention Solutions
Training/Learning/Development	Project Management Solutions
Leadership/Coaching/Mentoring	Workforce Planning
Knowledge Management	Meetings/Events/Conferences
Organization Consulting/ Development	Outsourcing Projects
Policies/Procedures/Processes	Communications/Public Relations
Recognition/Incentives/ Engagement	Public Policy/Social Programs
Change Management	Risk Management/Ethics/ Compliance
Technology/Systems/IT	Compensation and Benefits
Green Projects/Sustainability Projects	Wellness and Fitness Programs
Safety and Health Programs	Flexible Work Systems

are developed and implemented. The softer the process, the more mysterious the alignment issue, and this often leads to more requirements for business connection. For example, projects in human resources, public relations, and corporate communications are soft in nature and often spark an interest from top executives to ensure that new projects, programs, and various activities and functions in these areas are aligned to the business. Table A shows some typical programs and projects where alignment is a critical issue. This is only a starting point; alignment can occur in almost any area.

## The Importance of Business Alignment

The issue of business alignment is reaching critical importance in organizations. When a project is properly aligned to the business,

you and your organization will notice a huge difference. When it is not aligned, the results can be very disappointing and sometimes disastrous.

## The Value of the Project

Sometimes the value of the project is reflected in the extent of the business alignment. Projects should be connected to the organization in terms of key business measures. When this is achieved, the value of the project is increased, particularly for those who fund and support it. Table B shows the new definition of value. An important part of this definition is the connection to business and sometimes the financial outcomes.

# TABLE B

## The “New” Definition of Value

---

Value must:

---

be linked to important business measures

---

be balanced, with qualitative and quantitative data

---

contain financial and non-financial perspectives

---

reflect strategic and tactical issues

---

satisfy all key stakeholders

---

be grounded in conservative standards

---

come from credible sources

---

## Image of the Project

Projects that are not connected to business often suffer from an image perspective, while projects that are clearly connected have a more positive image. A business-aligned project earns executive respect and enhances the reputation of those who organize, control, implement, and even own these projects. This concept has evolved from the line versus staff distinction that permeated businesses decades ago. The line organization is the part of the business that produces and sells the project. In some cases the line focused on

just those who produced the product. The other work was called staff, as they supported the line organization. The line was considered to be important, valuable, and essential, and often earned the full respect of the executive team. Staff, on the other hand, was often perceived as a necessary evil, not fully respected by the rest of the organization. From this concept, projects that are clearly aligned to important outcome measures such as output, quality, cost, and time have a very positive image, particularly if the measures are closely related to the principal mission of the organization.

## Investing in the Project

Sometimes business alignment can determine whether or not a project is funded. Investment or funding decisions are usually made before a project is implemented. Also, investment decisions are made during a project to provide needed resources to keep the project going. After a project is completed, a decision is often made to invest in the same or similar projects in the future, based on the success of the project. In today's economy, lack of business alignment often results in lack of investment.

## Supporting the Project

To be successful, projects must be supported by managers. Support is provided in a variety of ways, such as allocating resources for the projects, allowing people to be involved in them, giving time to make them successful, and verbally endorsing the projects. Managers and administrators will support projects when they view them as important, and aligning projects to the business increases the perceived importance of a project. If the projects are not aligned, importance—and thus support—will diminish quickly.

## Project Approval

In some organizations, projects are only implemented if they are properly aligned to the business; otherwise they are not approved. By policy, procedure, or practice, some organizations will not

approve the project unless there is a clear connection to the business, defined prior to the implementation of the project. Additionally, in these organizations, projects will not be continued unless the alignment is maintained. The alignment is a critical part of the projected success.

Collectively, these issues make alignment a critical topic that cannot be ignored, regardless of the particular function in the organization.

## Who Needs Business Alignment?

The individuals who need business alignment are those who fund, support, and own the projects. To them, business alignment is essential, but there are many others who must be made aware of the connection to the business. Table C defines the stakeholders for typical projects and programs. While every one of these stakeholders can benefit from alignment, it is crucial to some more than others. The critical stakeholders are described in further detail below.

Figure A shows the interest in alignment with the different stakeholders, ranging from the highest level to the lowest level.

## Drivers for Business Alignment

So what has happened to cause so much focus on business alignment these days? Hasn't it always been an issue? If not, what is causing it? Five major influences are driving this issue.

### Trend toward Accountability

For the last two decades, there has been an obvious trend for more accountability in organizations. Executives have encouraged, supported, and even required others to be more accountable in driving important measures and outcomes. Figure B illustrates how different elements of a program's implementation have changed to focus

# TABLE C

## Stakeholders for Typical Projects and Programs

Stakeholder	Description
Stakeholder	Any individual or group interested in or involved in the program. Stakeholders may include the functional manager where the program is located, the participants, the organizer, the program leader, facilitators, and key clients, among others.
The Organization	The entity within which the particular project or program is evaluated. Organizations may be companies (either privately held or publicly held); government organizations at the local, state, federal, and international levels; nonprofits; or non-government organizations. They may also include educational institutions, associations, networks, and other loosely organized bodies of individuals.
Analyst	These individuals collect the data to determine whether the project is needed. They are also involved in analyzing various parts of the project. Analysts are usually more important in the beginning, but may provide helpful data throughout the project.
Bystanders	The individuals who observe the program, sometimes at a distance. They are not as actively involved as stakeholders, but are concerned about the outcomes, including the money. These bystanders are important, because they can become cheerleaders or critics of the project.
CEO/Managing Director/Agency Executive	The top executive in an organization. The top executive could be a plant manager, division manager, regional executive, administrator, or agency head. The CEO is the top administrator or executive in the operating entity where the project is implemented.
Evaluator	This person is responsible for measurement and evaluation, following all the processes outlined in this book. If this is a member of the project team, extreme measures must be taken to ensure this person remains objective. It may also be a person who is completely independent of the project. This individual performs these duties full- or part-time.

**Table C, continued**

<b>Stakeholder</b>	<b>Description</b>
Finance and Accounting Staff	These individuals are concerned about the cost and impact of the project from a financial perspective. They provide valuable support. Their approval of processes, assumptions, and methodologies is important. Sometimes, they are involved in the project evaluation; at other times they review the results. During major projects, this could include the organization finance director or chief financial officer.
Immediate Managers	The individuals who are one level above the participant(s) involved in the program or project. For some projects, this person is the team leader for other employees. Often they are middle managers, but most important, these people have supervisory authority over the participants in the project.
Participants	The individuals who are directly involved in the project. The term employee, associate, user, or stakeholder may represent these individuals. For most programs, the term participant appropriately reflects this group.
Project Designer/ Developer	The individuals who design and develop the project. The designers select and create the parameters for an effective and efficient project. The developers determine the content needed for success.
Project Manager	The individual(s) responsible for the project, program, initiative, or process. This is the individual who manages the project and is interested in showing the value of the project before it is implemented, during its implementation, and after it is implemented.
Project Team	The individuals involved in the project, helping to implement it. These are individual team members who may be full- or part-time on this particular project. On larger-scale projects, these individuals are often assigned full-time, on a temporary basis, or sometimes on a permanent basis. On small projects, these may be part-time duties.
Sponsor/Clients	The individual(s) who fund, initiate, request, or support a particular project or program. Sometimes referred to as the sponsor, it is the key group usually at the senior management level who cares about the project's success and is in a position to discontinue or expand the project.

# FIGURE A

## Interest in Business Alignment

Stakeholder	Interest Level
CEO/Top Administrator	High ↑
Finance/Accounting Staff	
Sponsor/Client	
Immediate Managers of Participants	
Project Participants	
Project Team	Moderate ↑
Project Evaluator	
Project Analysts	
Project Manager	
Bystander	
Project Designer/Developer	Low

on results, including the specific business measures. The previous approach, labeled activity management, focused on activities—sometimes ignoring what those activities were driving or delivering.

In the results-based approach, the process begins with the end in mind and exhibits clearly defined business measures. This requires alignment in the beginning of the process, at Step 1. The results-based approach has clearly shifted the thinking of stakeholders involved in projects.

### Competition for Resources

Driven in part by the global competitive economy, organizations must be very mindful of their resources. Budgets are not unlimited, and there is always competition with others for those resources. Inside an organization, there is always another department, function, or unit needing more budget than has been approved. Sustaining alignment throughout the project is the best way to keep the resources flowing. Important, fully aligned projects get the most resources.

# FIGURE B

## Paradigm Shift in Programs

In Activity-Based Programs:	In Results-Based Programs:
<ul style="list-style-type: none"><li>• There is no business need for the program.</li><li>• There is no assessment of performance issues.</li><li>• There are no specific measurable objectives.</li><li>• There is no effort to prepare program participants to achieve results.</li><li>• There is no effort to prepare the work environment to support the program.</li><li>• There are no efforts to build partnerships with key managers.</li><li>• There is no measurement of results or cost benefit analysis.</li><li>• The reporting on programs is input focused.</li></ul>	<ul style="list-style-type: none"><li>• The program is linked to specific business needs.</li><li>• There is an assessment of performance effectiveness.</li><li>• Specific objectives are set for application and business impact.</li><li>• The results expectations are communicated to participants.</li><li>• The environment is prepared to support the program.</li><li>• Partnerships are established with key managers and clients.</li><li>• There is a measurement of results or cost benefit analysis (ROI).</li><li>• Reporting on programs is output focused.</li></ul>

### Lean/Mean/Efficient Mentality

Organizations have experienced many change processes starting with a total quality management and moving through re-engineering, transformation, Six Sigma, lean engineering, lean Six Sigma, and various other processes. These processes have much in common in terms of attempting to make the organization more efficient and effective. By increasing efficiency, these processes focus directly on business measures and ensure that projects, programs, and activities are clearly connected to those measures.

# Global Recessions

The most recent global recession, coupled with others that have occurred and probably those that will continue to evolve, focused additional efforts on business alignment. The 2008-2011 global recession produced a mandate from executives to ensure that every new project or program is clearly connected to the business. Each program must add value and in many cases, must add value that exceeds the cost of the project. These recessions have a way of stimulating the efficient use of processes that often stay with the organization after the recession is over.

## Top Executive Requirements

Finally, top executives are demanding alignment. They will no longer accept investing in projects on faith. They want to see evidence, even proof. Even for the hard functions of quality and technology, executives want to see a clear line of sight to the business in a very credible way. They have adopted a theme of, “show me the money.” Figure C shows how this has evolved from “show me some data” to “show me the ROI.”

# FIGURE C

## Executive Focus on Projects and Programs

**The “Show Me” Evolution**

Term	Issue
Show Me!	Collect Impact Data
↓	↓
Show Me the Money!	And Convert Data to Money
↓	↓
Show Me the Real Money!	And Isolate the Effects of the Project
↓	↓
Show Me the Real Money, and Make Me Believe It!	And Compare the Money to the Cost of the Project



program. It also shows the three points at which business alignment occurs: at the beginning of the project (A), during the project (B), and during the follow up evaluation (C), in order to validate the alignment.

The V-Model is based on the concept of levels which has been used for centuries to express increased value at a higher level. For example, when something is said to be moved to “the next level,” it is suggested that the new level is more valuable than its predecessor. It’s best to think of the V-Model in terms of the evaluation side first. Evaluation of a particular project or program moves through different levels of measuring:

- ◆ Reaction to the program (Level 1).
- ◆ Learning skills and knowledge to make the program successful (Level 2).
- ◆ Application of skills and knowledge in the workplace (Level 3).
- ◆ Impact measures linked to the program (Level 4).
- ◆ ROI, a comparison of monetary benefits to the cost of the program (Level 5).

From the viewpoint of a program’s key stakeholders, such as the clients or sponsors, moving evaluation to the next level represents increased value, as most clients want to see the business contribution (Level 4) and even sometimes ROI (Level 5). In terms of evaluation of the program, it is at Level 4 that the effect of the program will be isolated on the data to indicate specifically how much improvement is connected to this particular program. When this is accomplished, the business alignment for the program is validated.

The measures that are captured at each level are defined in the objectives. There are five corresponding levels of objectives, as illustrated in Figure D. The business impact objective is the alignment through the program. When there is an impact objective, all the stakeholders are focused on the ultimate goal of the program in terms of business contribution. The focus is there for the organizers, designers, developers, facilitators, participants, managers

of participants, and others who have interest in the program. The objectives increase in value as the levels progress, with levels four and five being the most valuable from a client's perspective. These objectives are developed during the needs assessment. The needs assessment defines particular needs at each level. Here, the highest and most important level is the potential payoff of the program, followed by business needs, performance needs, learning needs, and preference needs.

## How the V-Model Works

At Level 5, the potential payoff needs for the program are addressed. This step examines the possibility for a return on investment before the program is pursued. At Level 4, the business needs that precipitated the need for consulting are examined. At Level 3, the specific performance that must change or action that must be taken to meet the business needs is defined. At Level 2, the specific information, knowledge, or skills that are required to address the performance needs are identified. This is a classic learning needs assessment. Finally, the preferences for the program define the Level 1 needs. This connection is very important for understanding all of the elements that make up a successful program or project.

## Using the V-Model

The V-Model provides a very effective way to examine any project or program. It clearly shows the points of alignment and it shows the client and sponsor how the entire project framework is developed. It represents an extremely useful way to illustrate the connection between the up-front analysis and evaluation of the follow up. The objectives provide the transition between the two. The appendix of the book contains several examples of V-Models to show how they can be implemented for a variety of projects and programs.

## Payoff Needs

The first part of the process is to determine if the problem is worth solving or the opportunity warrants serious consideration. In some cases, this is obvious when there are serious problems that are affecting the organization's operations and strategy. For example, at a hospital, an annual turnover of critical talent at 35 percent is an obvious payoff opportunity, and thus has potential payoff written all over it. In another example, new account growth is flat and customer loyalty is low, based on industry standards. These types of payoff opportunities make it clear that this is a problem that needs to be solved or an opportunity that should be pursued with a clearly identified business need.

Some requests represent not-so-obvious payoff opportunities such as a request to implement leadership competencies for all middle level managers or establish a project management office. It is not clear what business measures will actually change as a result of these projects. The focus at the next level (Level 4) is to clearly define the business measure or measures. In an experimental project of converting employees to a work-at-home arrangement, the initial request to reduce employee travel time in order to lower costs and have a positive impact on the environment was not so obvious in terms of payoff. A work-at-home solution was anticipated. Additional detail was needed, and this need led to the connection of several measures. These requests may be difficult for the not-so-obvious opportunities and may raise concerns. The project may not be connected to business needs, and if it isn't, the client should be made aware.

At this level, it is important not only to identify the business measures that need to improve, but also to convert them into monetary values so the anticipated improvement can be converted to money. The "show me the money" requirement is occurring more often these days. The second part of the process is to develop an approximate cost for the entire project. This could come from a detailed proposal or even a rough estimate. At this stage, only

an estimate is necessary. The projected cost of the project is then compared to the potential monetary benefits to show the ROI forecast. A forecast of ROI is important in very expensive, strategic, or critical projects. This step may be omitted in a situation when the problem must be solved regardless of the cost. For example, as an organization strives to be a socially responsible leader, it may be difficult to place a monetary value on the goal.

## Business Needs: The First Point of Alignment

At Level 4, business data are examined to determine which measures need to improve. This involves a review of organizational records and reports, examining all types of hard and soft data. It is usually the performance of one of the data items that triggers the consulting project. For example, when market share is not as much as it should be, operating costs are excessive, product quality is deteriorating, or productivity is low, the business measure is easily pinpointed. These are key issues that come directly from the data in the organization and are often found in the operating reports or records.

Business needs are sometimes arranged in categories of hard data to include output, quality, cost, and time. Examples are sales, production, errors, waste, accidents, costs, downtime, project time, and compliance fines. These measures exist in any type of organization, even in the public sector and among nonprofits and nongovernment organizations (NGOs). These measures often attract the attention of executives, as they represent business impact. An important goal is to connect the project to one or more of these issues.

Sometimes impact measures are more on the soft side, which includes customer service, image, work climate, customer satisfaction, job satisfaction, engagement, reputation, and teamwork. Although these may not be perceived to be as important as hard data, they are still important, and in many cases, a project will be connected to several soft data items. This book defines a soft

measure that can be converted to money as “tangible.” If it cannot be converted to money credibly, with a minimum amount of resources, it is left as an “intangible.” This definition suggests that most of the hard data categories are usually converted to money and are thus tangible.

## Performance Needs

The Level 3 analysis involves determining performance needs. The task is to determine what is causing the problem (or creating the opportunity) identified at Level 4 (e.g. what is causing the business to be below the desired level). Something in the system is not performing as it should and may include, among other things, the following:

- ◆ inappropriate behavior
- ◆ dysfunctional behavior
- ◆ ineffective systems
- ◆ improper process flow
- ◆ ineffective procedures
- ◆ unsupported processes
- ◆ inappropriate technology
- ◆ inaction of stakeholders.

The analysis usually reveals that a group of people are not performing as they should. The reason for this inadequate performance is the basis for the solution, the project. For example, if employee health care costs are increasing more than they should and sick leave usage is increasing, the cause may be unhealthy habits of employees. A wellness and fitness program may be needed.

Performance needs must be uncovered using a variety of problem-solving or analysis techniques. This may involve the use of data collection techniques discussed in this book, such as surveys, questionnaires, focus groups, or interviews. It may involve a variety of problem-solving or analytical techniques such as root-cause analysis, fish-bone diagrams, and other analysis techniques. Whatever is used, the key is to determine all of the causes of the

problem so that solutions can be developed. Often, multiple solutions are appropriate.

## Learning Needs

The analysis at Level 2 usually uncovers specific learning needs for the participants involved in the project. The analysis may reveal learning deficiencies, in terms of knowledge and skills, that can contribute to the problem if they are not the major cause of it. In other situations, the solution will need a learning component as participants learn how to implement a new process, procedure, or technology. The learning typically involves acquisition of knowledge or the development of skills necessary to improve performance. In some cases, perceptions or attitudes may need to be altered to make the process successful in the future. The extent of learning required will determine whether formalized training is needed or if more informal, on-the-job methods can be utilized to build the necessary skills and knowledge.

## Preference Needs

The final level is to consider the preference for the project solution. This involves determining the preferred way in which those involved in the process will need or want it to be implemented. A fundamental issue at this level is the perceived value of the project. Typical questions that surface are, "Is this important?" "Is this necessary?" and "Is it relevant to me?" Preference needs may involve implementation issues, including decisions such as when learning is expected and in what amounts, how it is presented, and the overall time frame. Implementation issues may involve timing, support, expectations, and other key factors. The important issue is to try to determine the specific preferences to the greatest extent possible so that the complete profile of the solution can be developed based on all of the needs.

# Objectives

It is easy to see that the detailed needs analysis at the different levels yields the objectives for the particular project or program. Ideally, for projects involving major resources and those of significant importance to the organization, a thorough needs assessment should be conducted and corresponding objectives should be developed at all levels. Perhaps the ROI objective can be omitted, but having impact and application objectives is very critical. The application objectives detail what individuals should be doing to make the project successful. In terms of formal learning and development, this is typically the use of the skills. Impact objectives are the consequence of those skills and represent the business measure that was identified in the original business needs analysis. This provides a focus on business during the project, ensuring that alignment is a top priority for all of those involved, particularly the participants and the facilitators in a formal learning setting. Objectives are developed to be very specific, often with accuracy, quality, and time specifications. More detail on objectives is provided in Step 6.

## Levels of Evaluation

The levels of evaluation, as previously described, provide the framework for data collection to measure the success of the project. The levels of evaluation build on the objectives. Objectives define precisely what is measured, and often include the definition of success for that measure. These are classic levels for all types of projects and programs. These levels date back to John Quincy Adams, as he developed levels of effectiveness of leaders. Adams suggested that leaders cause others to dream more (Level 1), learn more (Level 2), do more (Level 3), and become more (Level 4). Additional information on levels of evaluation can be found in later chapters.

# What Happens When Alignment Is Not Achieved?

When business alignment is not achieved the potential advantages of a project, program, or function are not seen, and the opposite of the desired effects often develops. Below is a summary of some straightforward consequences that can result.

- ◆ Funding will suffer when business alignment is not evident.
- ◆ Support is necessary for success; if a project is not connected to something meaningful in the organization, its importance and support will diminish.
- ◆ A variety of support functions are seeking influence, such as technology, marketing, human resources, risk management, and others. When these functions are aligned to the business, they will gain influence; and without such alignment, influence could dwindle or disappear completely.
- ◆ Proper business alignment builds relationships with key business partners who will support you, request your services, and help reward you in many ways. Without it, the relationship deteriorates.
- ◆ The image of functions often suffers without connection to the business. This is particularly true for the soft processes of communications, public relations, government affairs, leadership development, and change management; these areas must strive for business alignment in order to be supported and sustained.

## Final Thoughts

Business alignment is critical and essential. This introduction outlines why it should be undertaken and where to begin. The V-Model clearly shows what steps must be taken to ensure alignment is achieved at the beginning of the project, as it is connected to business need. It also ensures that appropriate impact objectives

are developed to keep the project focused and connected to a business measure throughout its implementation. Finally, on the follow-up, when post-program data are collected, the business measure is monitored as part of the evaluation at Level 4, impact evaluation. When the impact of the program is isolated on the business data, the resulting business contribution is clearly defined, showing the proof that the program or project made a difference. The V-Model is an extremely helpful tool in ensuring business alignment is achieved and maintained. There are many reasons why alignment occurs and there are many advantages for having alignment. As a process, business alignment can no longer be ignored.

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# Discuss Business Alignment with Clients

## OVERVIEW

Not all projects are appropriate for business alignment.

Communication with the client should be clear and open.

There are five critical areas of discussion.

The best time to have the initial discussion with the client about the business alignment issue is at the conception of the project. The preparation necessary for these conversations is a full understanding about the

value of business alignment and the key issues involved in the V-model, the alignment process (covered in the Introduction). This chapter, the first step to business alignment, explores the necessary conversations that must be conducted early, not only to explain the concept of business alignment to the client, but also to move the project to the desired alignment. This is important, particularly when the requested or planned project is not so clearly connected to the business.

Discussing business alignment with a client may require a bit of explaining, informing, persuading, encouraging, and recommending as particular steps, issues, thoughts, or cautions are explored. These conversations may occur in an environment where a client is not interested in having additional dialogue. Sometimes the client is resistant to any discussion that changes the project in any way after the initial request. These types of discussions can be

sensitive and thus must be subtle, diplomatic, and persuasive, and at the same time, not forceful or demanding. Five key issues are addressed in this first step.

## Should This Project Be Aligned to the Business?

Not every project should be aligned to the business. At the same time, some should always be aligned to the business, and there are many in between. The first issue is to sort out which projects are appropriate for business alignment, and to discuss this issue with the client. Table 1.1 outlines the selection criteria for programs that are ideal for business alignment, those that may be more appropriate to be aligned to application instead of business, and those that may not need to be aligned to the business.

### Impact and ROI

In the first category for selecting projects for business alignment is the life cycle of the proposed project. Sometimes a project will have a long life cycle once it is fully implemented. When this is the case, perhaps the project should be aligned to the business to make sure that the business value is there. Conversely, if the project is short term, such as a one shot effort, it may not be necessary to align it to the business.

The most critical projects for alignment are the ones that are tied directly to goals or operational issues. Almost by design, these projects are usually connected to the business, but they may lack the specificity and detailed connection to business measures. Obviously, these are great candidates for business alignment.

The extent that a project supports strategic objectives is important. Sometimes a project is initiated because of a particular strategic objective. When this is the case, business alignment is absolutely essential. In other cases top executives are interested in the alignment because of the strategic linkage or perceived linkage

# TABLE 1.1

## Which Projects Are Ideal for Business Alignment?

---

### Criteria for Selecting Projects for Business Alignment

- Life cycle of the project
- Linkage of project to operational goals and issues
- Importance of project to strategic objectives
- Top executives' interest in the alignment
- Cost of the project
- Visibility of the project
- Size of the target audience
- Investment of time in the project

### Criteria for Selecting Projects for Application Alignment

- Short cycle projects
- Projects where application is critical
- Projects where behavior change is critical
- Compliance projects
- Skill-based projects

### Projects That Are Not Necessarily Ideal for Business Alignment

- Entry level projects
  - Job related skills
  - Very brief projects
  - Very inexpensive projects
- 

to strategy. In these cases, senior executives are requiring evidence of a project's alignment to the business. The logic is straightforward: If it is important enough to drive strategy, it is important enough to be measured at the impact and ROI levels.

The cost of the particular project often forces business alignment. Expensive projects must be connected to the business, while inexpensive projects may not necessarily require a connection. The visibility of the project is sometimes an issue. Highly visible projects often bring out the critics and they will ask for accountability, including the business connection. Sometimes the size of the target audience is important. If the project involves 20,000 employees when it is fully implemented and each person will have to take

time to be involved in the activities or processes, then it becomes important enough to connect it to the business.

If a project involves only 10 people in the legal department, alignment to the business may not be necessary. Finally, when large amounts of time and resources are committed to a project, the project should be connected to the business in most cases.

Collectively, these important issues drive the need to connect to business measures. These criteria should be considered together for the selection of ROI projects, or in a system to make sure each criterion is given the proper weight.

## Application

Sometimes projects should stop with alignment at the application level. This requires that the project be clearly defined at the very beginning, classifying what new actions, processes, or behavior must be in place for the project to be successful. Objectives should be set at the application level and the follow-up data should show that the application has occurred. Certain projects can stop the alignment at this level, which is short of the business alignment level. These are often projects that are very short cycle, maybe one-time projects that potentially have an urgent need to be completed. Sometimes projects require specific behavior or process steps. For example, in a software implementation project, the technology is already in place but some individuals may need to be prepared to use the software appropriately. Application alignment is probably most important. Sometimes behavior is the most important issue, particularly with soft programs that involve topics such as communications, public relations, leadership development, and organizational change. Again, application is probably most important.

Many new compliance programs are based on application. In order to be in compliance, employees must be operating in a particular way (application). When compliance is based solely on

application, perhaps the alignment is needed only at that level. When projects are based on acquiring necessary information for a particular job, it may not be necessary for the project to advance to business level, but end at the application level.

## When Is a Project Not Appropriate for Business Alignment?

Finally, some programs are not appropriate for business alignment. Projects where compliance is defined at Level 2 or even 0 are not good candidates for business alignment. For example, some compliance projects mean that every individual must have exposure to a particular topic or issue. This exposure is defined as input in the project and it is often referred to as Level 0. Sometimes compliance is defined by individuals only having awareness of a certain issue. When this is the case, the compliance is based on learning, which is Level 2.

Technical requirements for jobs are absolutely essential for the work to be done. Projects involving job-needed skills or requirements are not good candidates for business alignment. Projects involving new employees are often improbable candidates for business alignment because the project involves necessary job requirements, so business alignment may not be necessary. Very brief programs and projects do not make practical candidates either. For example, a one hour e-learning project to show a sales team how to cross-sell a particular product may not need business alignment as it is both very inexpensive and short.

In summary, as Table 1.1 illustrates, there are some very general guidelines to help to select programs for business alignment. These are only suggestions. Beyond those criteria, there may be other indicators that suggest when project alignment is needed at the business level.

# Clarifying Business Alignment Expectations

Although the client may know about the concept of business alignment and may even request it, sometimes they are unsure of what it actually means and how it is developed. The process covered in this book is comprehensive and remarkably user friendly. It is also a process that is used by thousands of organizations to achieve business alignment. Part of the process of communicating with the client is to clearly understand their expectations, addressing the issues in Table 1.2.

## Balanced Set of Data

The first issue is to define the different types of data. The V-Model alignment in this book offers up to five levels of data. The client should understand that all these data sets are captured in the business alignment process. When alignment is made at the business level (Level 4), alignment is also necessary at Levels 3, 2, and 1. As an optional part of the business alignment, ROI can be developed. The decision may be made in the beginning of the project to ensure that the ROI is a part of the alignment. For some, the ROI, or the monetary value of the business improvement compared to the cost of the program, represents the ultimate business alignment. When calculating the actual ROI, some measures cannot be converted to money credibly with a reasonable amount of resources. These are the intangibles and they are very important alignment data. Clients are usually pleased with the different data sets that can be aligned to the project.

## Credibility of the Process

It is important for the client to understand that the methodology being used in this book is credible and builds on the success of over 4,000 organizations in 58 countries. It uses consistent categories of data collected in a step-by-step process. Conservative standards are involved in the analysis. Throughout use of the

# TABLE 1.2

## The Case for Business Alignment

---

### Balanced Data Set

---

1. Reaction and Planned Action	Measures participant reaction to the project and captures planned actions, if appropriate.
2. Learning	Measures changes in knowledge, skills, and attitudes related to the project.
3. Application and Implementation	Measures changes in on-the-job behavior or actions as the project is applied, implemented, or utilized.
4. Business Impact	Measures changes in business impact variables (tangible and intangible).
5. Return on Investment	Compare project monetary benefits to the costs.

---

### Business Alignment Follows a Very Credible Methodology

- Common categories of data
  - Systematic, step-by-step process
  - Conservative standards
  - Results-based approach
  - High level of use
  - Client focused
  - Satisfies all stakeholders
- 

### Business Alignment Provides a Payoff

- |   |   |
|---|---|
| <ul style="list-style-type: none"><li>• Show contributions of selected projects.</li><li>• Justify/defend project funding.</li><li>• Identify inefficient projects that need to be redesigned or eliminated.</li><li>• Improve image of function.</li><li>• Earn a "seat at the table."</li></ul> | <ul style="list-style-type: none"><li>• Align project to business needs.</li><li>• Earn respect of senior management/administrators.</li><li>• Improve support for project.</li><li>• Enhance design and implementation processes.</li><li>• Identify successful projects that can be implemented in other areas.</li></ul> |
|---|---|
-

entire process, there is a focus on results. With the extensive applications, it is estimated that at least 5,000 projects a year achieve business alignment using this methodology. The process is very client focused as it requires routine communication and input from clients. Finally, it satisfies the different stakeholders involved, particularly at the C-suite level, including CEO and CFO.

## The Payoff

Another important conversation to have with clients is the payoff of the alignment process. As Table 1.2 shows, there are many reasons for achieving business alignment. Most clients clearly understand the issue of funding. Adequate funding must be provided and maintained throughout the project. Business alignment is one of the best ways to justify and defend business projects. It helps to drive process improvement and program redesign when things are not working so well. Proper business alignment will also build respect for the function where the project is located, improve support of the project, and help to build relationships with executives. The key issue is to brief the client about the importance of business alignment and the expected outcome of achieving alignment with business measures.

## Review the Current Status

The current status of alignment is reviewed by using the V-Model. When using the V-Model, the client discussion should focus on the current status of the project and its movement toward business impact. The approach for this is detailed in Table 1.3 and begins with the issue of the proper time to bring up the alignment. Following the discussion in the previous section, alignment should always be kept at the forefront of client conversations. Business alignment should always be mentioned as a possibility. The concept should be fully explained and explored when there is interest. Sometimes it should be pushed or required when it becomes obvious that the project should be aligned to the business.

# TABLE 1.3

## The Message to Clients

---

### When to Mention Alignment

- Always mention the results-based approach.
  - Mention business alignment as a possibility.
  - Explain business alignment—when there is interest.
  - Push business alignment—when it should be considered.
  - Require alignment—when it is a must.
- 

### Business Alignment Details

- Because of the critical importance of this project, alignment is built into the project.
  - Data collection, analysis, and reporting will be handled by an external group.
  - Your involvement will be necessary, but minimal.
  - You will receive a detailed impact study, and executive summary, and a one-page summary.
  - The study will contain recommendations for improving the project (process improvement).
  - The results will be presented to key stakeholders.
- 

### Additional Questions

- What are the objectives for the project at each level?
  - Is this a problem worth solving?
  - Is there a potential payoff?
  - What is the specific business measure?
  - What happens if we do nothing?
  - What is occurring or not occurring on the job that influences the business measure?
  - What skills or knowledge is needed to support the job performance need?
  - How should the solution be structured?
- 

### Business Alignment Is Feasible

- It's not very expensive.
  - Many shortcut methods are available.
  - Time requirements can be easily managed.
  - It fits all types of projects.
  - Technology helps with costs/time.
  - Implementation is planned/systematic.
-

## Business Alignment Details and Questions

It is important to discuss the details involved and show what steps are necessary to achieve proper business alignment for projects. Clients must also be aware of what they will receive in exchange for their extra efforts as they approach the alignment process and become involved with it. Additional questions direct the attention to the business measure. These questions are essential to ensure that the alignment is achieved when it is not so obvious that the project is connected to the business. Additional questions and probing issues are covered in subsequent chapters. Sometimes there are obvious alignment opportunities when the project is presented with business measures clearly defined. In other situations, the business measure is not as clearly defined and it must be developed. In between those two extremes there is often confusion, and these types of questions will help direct the client to the proper business measure.

### Business Alignment Feasibility

The client must understand that alignment is feasible and can be achieved within resources needed for the project. Rarely does the alignment piece cost additional money. If the alignment does lead to further costs, it should only involve a few questions in the beginning and then during the follow-up. If the follow-up is planned the only additional step is to isolate the effects of the programs on the business data. If follow-up is not planned, that piece will have to be added to ensure that alignment was achieved in the process.

## Success Factors for Achieving Alignment

Most clients want to know what can make the project successful, particularly as it is aligned to the business and as the business connection is tracked throughout the process. Table 1.4 defines those success factors.

# TABLE 1.4

## Success Factors for Business Alignment

---

### Set the Ground Rules

- Business alignment is a process improvement tool designed to improve projects.
  - Business alignment is not designed for performance review for individuals.
  - Every project reveals opportunities for changes.
  - Negative results represent the best opportunity to learn.
  - Negative results have a positive story.
  - Don't wait for a client to ask for business alignment.
- 

### Before the Project Is Initiated

- Clients commit to business alignment.
  - Alignment with business measures is achieved.
  - Specific objectives for application and impact are developed.
  - Performance issues are addressed.
  - Participants commit to drive results and provide data.
  - Content is focused on application and impact.
- 

### During the Project

- Impact objectives are in place.
  - Projects are facilitated with application/impact in mind.
  - Effective data collection methods are used.
  - Specific strategies are implemented to transfer learning to the job.
  - Participants provide adequate data.
- 

### After the Project Is Completed

- Alignment is validated (results isolated to the project).
  - Business alignment follows conservative standards.
  - Results are communicated to key stakeholders.
  - Results are used to drive improvement.
  - Results are used to market/fund future projects.
-

## The Ground Rules

The process begins with the ground rules. It is important that the client fully understands what must happen in order for the project to be successful. First, the client or sponsor must clearly understand that this is a process improvement tool designed to improve projects and programs. This process is not necessary for performance review of participants or owners. Usually the project fails because of other influences. This could be a debatable issue, but projects are usually not successful when the failure of the project is considered part of the performance review for those people involved in it.

For some projects, the project managers must be held accountable, and this is an appropriate understanding when defined beforehand. Participants are attracted to a project's impact and success as it is linked to business measures. However, not many individuals want to be involved in a project as participants if their performance evaluation is affected by influences outside of their control. The primary reason for the project failing is not always the project itself or the participants and the stakeholders who are charged with making it work. Failure comes from other influences and perhaps even lack of support from the managers of participants.

An important ground rule is to pursue business alignment on a proactive basis and not wait on the request from top executives. Unfortunately, this is not always the approach. Too many program organizers wait until executives force the issue. This places the team on the executives' agenda, often with a short time frame to show business results.

## Program Implementation

Before the project is initiated, several factors must be considered as shown in Table 1.5. This list provides the client with an understanding of what the different stakeholders must do to make the project successful. Most of these are addressed during alignment

discussions. During the project, the impact objectives drive the alignment through the process. The success factors focus on the role of participants, facilitators, and data collection. Finally, after the project is completed, the alignment is validated with the extra step to isolate the effects of the project on the data. A few more issues are necessary for that alignment to be completed and validated. Collectively these issues can make the difference in success or failure of a project from a business alignment perspective.

## Resources and Roles to Achieve Success

The final question often raised by clients is: “What is my role and what are the roles of others to make this project successful as it is aligned to the business?” Essentially, the requirement of business alignment makes a project a little different for some, because previously these types of projects may not have been connected to the business. Extra effort is needed throughout the project and during the follow up. Aligning a project to the business also requires a different mindset for all individuals involved who must accept responsibility and be open to accountability of driving business success with this project. Table 1.5 shows the various roles of the stakeholders involved in the project. This provides a quick checklist for ensuring that everyone is aware of what is necessary to achieve success.

It is important for the individual who is selling the alignment to the client to build rapport. This may be the project owner, project developer, or other stakeholder. This individual ensures that the alignment is achieved in the beginning and that the objectives are developed to align the project throughout its implementation. This individual will also ensure that the alignment is validated for the follow-up.

Within Table 1.5 is a list of the client roles and a brief description of what is required of each. This is similar to the success factors detailed earlier but now provides clear specifics of what must be achieved. The analyst’s role ensures that the project is aligned

# TABLE 1.5

## Roles in Business Alignment Projects

---

### Projects Owner's Role in Business Alignment (the person selling alignment)

- Understand business alignment.
  - Explain business alignment.
  - Encourage business alignment.
  - Use business alignment data properly.
  - Use business alignment results in strategic marketing.
- 

### Client's Role in Business Alignment

- Understand business alignment.
  - Support business alignment.
  - Provide resources for business alignment studies.
  - Use business alignment data properly.
  - Embrace business alignment as process improvement.
- 

### Analyst's Role in Business Alignment

- Ensure the program/project is needed.
  - Connect program to business need.
  - Develop objectives at multiple levels.
- 

### Designer's/Developer's Role in Business Alignment

- Clarify objectives.
  - Relate content to application/impact.
  - Include application/impact in exercises/activities.
- 

### Participant's Role in Business Alignment

- Be involved in project.
  - Learn the content.
  - Apply the content.
  - Achieve results (impact).
  - Provide data when needed.
- 

at the beginning, often under the direction of the project owner. The designer/developer will ensure that the content of the project clearly connects to the business, using exercises, simulations, skill practices, tools, and other processes that make up the content of the project.

**Table 1.5, continued**

---

**Facilitator's/Coordinator's Role in Business Alignment**

- Begin with the end in mind.
- Teach to application/impact objectives.
- Require action plans and other application tools.
- Be involved in follow-up.

---

**Evaluation Team's Role in Business Alignment**

- Complete evaluation planning.
  - Design data collection instruments.
  - Collect data.
  - Analyze data.
  - Report results.
  - Drive improvement.
- 

The participants' roles must also be clearly defined. These are the individuals who will ultimately make the project successful. They are always expected to be involved and fully engaged in the project, and to ensure that various project activities are completed. This has expanded now to include securing the business results. Otherwise the project will not be successful. Also, these participants often have to provide data that is necessary to show the value of the project, particularly for the impact measures on the follow-up evaluation.

The roles of the facilitators and coordinators are relatively straightforward, although their involvement may be higher than usual. The facilitator is now responsible for driving impact objectives, which indicate they must take the project through to the changes in business measures. For some, this may be uncomfortable, particularly for a project that has a longer time period for achievement. They prefer to be held accountable to the activities that are inherent at the application level. Also, for learning and development programs, facilitators quickly suggest that they have no influence on the success of the project beyond the classroom and are merely coordinating some of the activities. However, having impact objectives clearly detailed ensures that they properly influence the achievement of business improvement.

Finally the role of the evaluation team is very straightforward. With business objectives in hand, it is easy to plan the evaluation, collect and analyze the data, and report the results. Without clear objectives all the way through to business impact, this task is difficult. With proper objectives in place, evaluation becomes much easier.

## Final Thoughts

Communicating with a client is the first of 10 steps for achieving business alignment. This is a step that if not done properly will jeopardize the entire process. The client must fully understand what is involved and what is needed to achieve business alignment for the project. Pushing the project to business alignment often elevates it to a higher level of accountability. While this brings on a bit of extra work, it can also bring additional exposure that must be managed throughout the process.

The client has a critical role in the success of the project, the actual alignment, and of influencing others to step up to this level of accountability. This step fully explored the five critical areas for this additional discussion. The next step focuses on determining the payoff needs.

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