PROPELLER

ORGANIZATIONAL ALIGNMENT — FROM STRATEGY TO IMPLEMENTATION

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HOUSEKEEPING

MODERATORS

Jenni Jayne and Nitin Joshi

AUDIO & VIDEO DISABLED

Audio & video will be disabled during presentation

POST QUESTIONS TO CHAT

Post your questions in the chat – we will address at the end

WEBINAR IS RECORDED

This webinar is being recorded and will be provided shortly afterwards via email

SPEED & ADAPTABILITY WILL OWN THE FUTURE

Keeping pace with how markets and industries are changing is essential. Organizations across all industries must act with greater responsiveness to thrive in today's disruptive business environment.

Propeller partners with organizations to navigate and succeed in this increasingly volatile business landscape. By helping to instill speed and agility, Propeller helps clients to drive long-term growth, increase internal efficiency, and build strong capabilities.

WE HELP BIG MOVE FAST AND ACT SMALL

MOVING FORWARD: LEADING PEOPLE AND ORGANIZATIONS

DESIGNING YOUR FUTURE WORK ENVIRONMENT WITH AN EMPLOYEE-FIRST LENS

ALIGNING TEAMS TO CHANGING BUSINESS PRIORITIES

RESPONSIVE AND NIMBLE PLANNING IN THE NEXT NORMAL

ALLISON TORPEY

DIRECTOR, DENVER OFFICE

- Avid yogi and marathoner
- Favorite instrument is the pipe organ
- Sewed her own prom dress as a junior

DAVID WOLTZE

SILICON VALLEY MANAGING DIRECTOR

- Native Oregonian
- Always looking for food recommendations
- Loves to scuba dive while traveling

COVID'S ARRIVAL SPARKED STRATEGIC SHIFTS

The transition to accommodate COVID-19 restrictions forced businesses to pivot quickly and reset their organizational priorities.

BUSINESSES NOW FACE A SHARED OPPORTUNITY

The opportunity to properly align our organizations around new priorities

Aligning organizations with our strategic objectives and bringing employees along on the journey is the next step in this process

"The most empowering condition of all is when the entire organization is aligned with its mission, and people's passions and purpose are in sync with each other."

— BILL GEORGE

BASICS OF ORGANIZATIONAL ALIGNMENT

CORPORATE MISSION + VISION

ORG STRATEGY

STRATEGY ALIGNMENT

LEADERSHIP	GOVERNANCE

DIRECTIONAL ALIGNMENT

STRUCTURE	ENABLERS

PEOPLE & EXPERIENCE

FOUNDATIONAL ALIGNMENT

MEASURING SUCCESS

Establishing clear and transparent corporate strategies and aligning teams throughout the company to these objectives.

Assessing and adjusting Leadership and Governance activities and best practices to best enable your team(s) to be successful.

Supporting your greatest asset, your employees, through a collaborative and effective structure, ensuring they have enablers such as tools, data, and the space to collaborate, and meaningful work experiences that keep them engaged.

Measuring success based off project, program, and outcome based metrics

FROM STRATEGY TO IMPLEMENTATION

ESTABLISHING THE STRATEGY

CREATING DIRECTION

ENABLING EMPLOYEES

MEASURING SUCCESS

POLL #1

Which of these components do you anticipate being the most challenging?

PIVOTING CORPORATE STRATEGIES

CHANGING ENGAGEMENT CHANNELS

Selling product through new or less used channels

- **Retail** - Driving sales to online channels

- **Grocery** - Ramp-up in delivery

- **Restaurants** - Curb-side pickup

- **Fitness** - Moving workouts online

- **Healthcare** - Rapid acceptance of telemedicine

- **Financial Services** - Increase in online servicing and elimination of cash
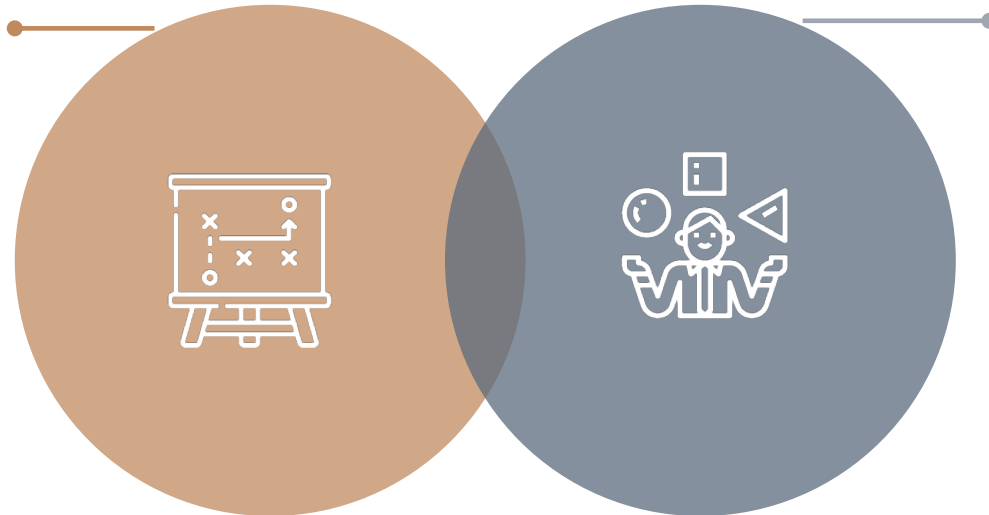
PIVOTING THE PRODUCT

Adjusting the product set based on change in demand

- **Retail -** Change in product demand requiring rapid sourcing

- **Grocery** - Increased focus on cleaning products

- **Airlines** - Shifting from passengers to cargo flights

- **Hotels** - Make-shift offices

- **Financial Services** - Shift to supporting PPP application/distribution

- **Beverage** - Distilleries shifting to hand sanitizer manufacturing

USE CASE #1

Covid-19 restrictions forced one prominent retailer to shutter its brick and mortar locations, severely threatening revenues

MAIN CHALLENGE
Retain revenue despite store closures

INTENDED OUTCOME
Repurpose workers in creative ways to engage online consumers

RISKS
Lost revenue and potential to furlough workers

IMPACT
Brand Loyalty and turnaround in sales

USE CASE #2

A prominent US automaker repurposed its factory to manufacture medical ventilators

MAIN CHALLENGE

Unutilized factory capacity due to Covid

INTENDED OUTCOME

Identify new revenue stream, contribute to national production

RISKS

Outside of traditional business scope

IMPACT

Produced 30,000 ventilators/month
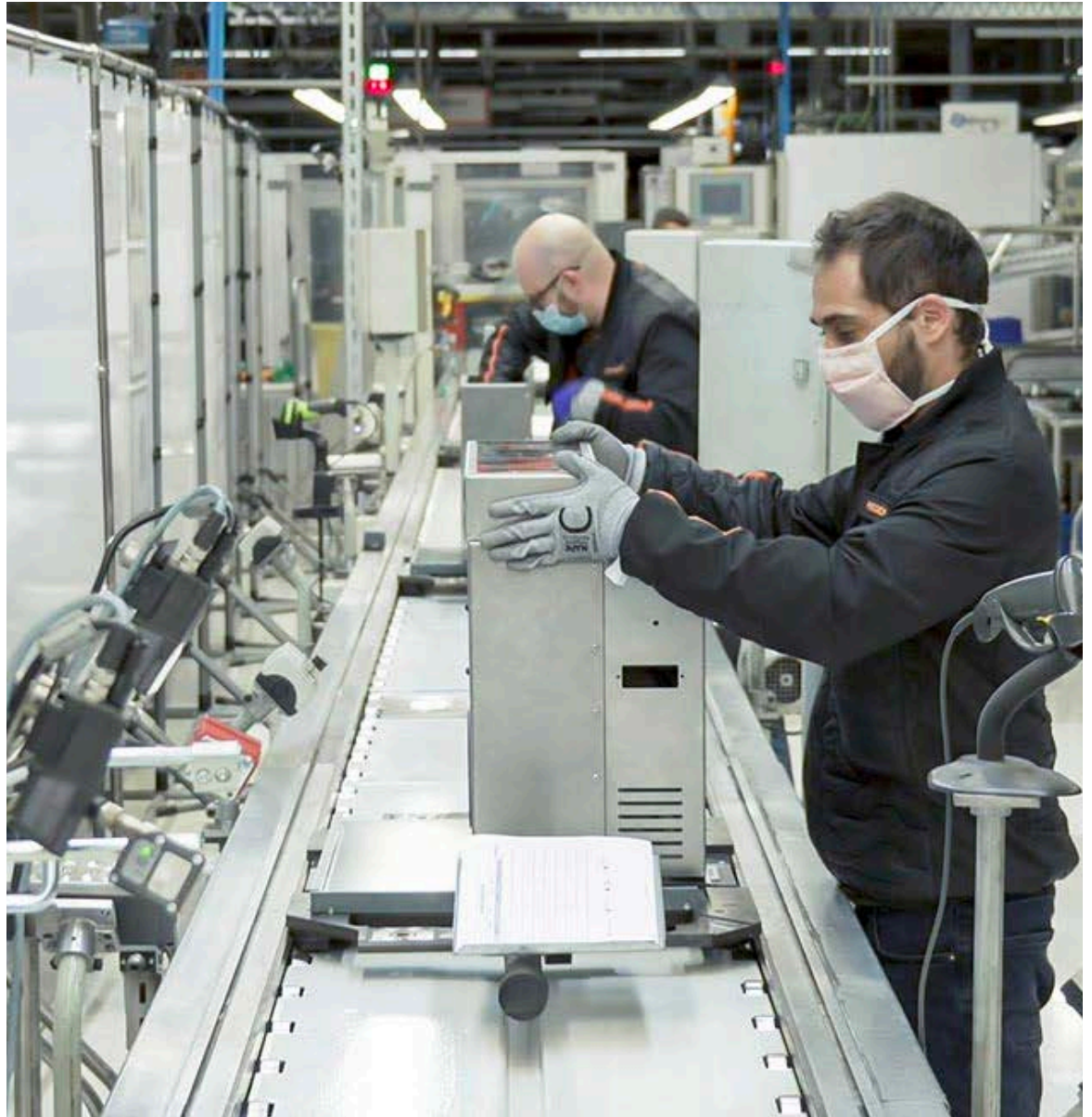
POLL #3

How effective has your company's leadership been in establishing a new direction over the past several months?

FROM STRATEGY TO IMPLEMENTATION

ESTABLISHING THE STRATEGY

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MEASURING SUCCESS

LEADERSHIP BEST PRACTICES

ESTABLISHING GOVERNANCE

LEADING TEAMS THROUGH CHANGE

BE REALISTIC

Staying positive is critical to ensuring teams stay motivated, but that optimism must be tempered by a healthy dose of realism.

HAVE A PLAN

Once you have a picture of the landscape, it's important to form a plan and share it with your team; just don't be afraid to adjust as things change.

KNOW WHAT'S OUT OF YOUR CONTROL

Keeping your team focused on what it can control (instead of what it can't) can help to maintain focus, prioritize effectively, and boost morale.

BE TRANSPARENT

Sharing as much information as you can, both the highs and the lows, transparently with your team helps to build trust and enable better decision making.

BUILD TRUST

One of the most important things you can do as a leader is cultivate trust in the organization – this comes through active listening, transparency, authenticity, and honesty.

COMMUNICATE EARLY + OFTEN

Clear, consistent, and frequent communications are critical to ensuring everyone on your team is aligned to and working towards the same goal.

LOOK FOR THE SILVER LINING

It's easy to focus on what has gone wrong but changing perspectives and celebrating the small wins can significantly impact your team's outlook.

ESTABLISHING NEW NORMS

COMMON MISTAKES			BEST PRACTICES
Tops-down generated directives	✕	✓	Engage teams and individuals throughout
"One size fits all" approach	✕	✓	Customized approach per persona
Assume all employees understand the changes	✕	✓	Tailor "why" statements for the audience
Managers communicate the norms once	✕	✓	Clear and consistent communications
Assume the norms are "final"	✕	✓	Adjust and pivot as appropriate

COMMUNICATIONS PLANNING

ESTABLISHING A COMMUNICATIONS STRATEGY

PARTNERS

Identify your business partners — from executive to individual employees — that are being impacted by the changes in your business unit

CONTENT

What messages must be conveyed — empathy, the value proposition of new norms, changes to the business, how your partners are impacted, what's next for them

CHANNELS

Map out your most effective communication channels — from townhalls to emails and Zoom to Slack

FREQUENCY

Establishing a frequency of communication that will keep your team and business partners engaged, informed, and aligned to your strategies

LEADERSHIP

ESTABLISHING GOVERNANCE

GOVERNANCE BEST PRACTICES

TRANSPARENCY & DOCUMENTATION — Establish tracking mechanisms and create transparency into the work being done, what's in the backlog, and the priorities of various initiatives.

EMPOWER DECISION MAKERS — Processes and clear roles and responsibilities should be established that allow for decision making without excessive approval levels slowing down progress.

DON'T LET CUSTOMERS DICTATE SOLUTIONS — Own your business and ensure best practices are established by creating avenues that allow for evaluating of solutions instead of letting customers dictate approach

BUILD IN TIME FOR INNOVATION — Reserve and maintain dedicated time (10-20%) for working on innovative products or solutions that will drive your business into the future

POLL #4

How confident are you in your organizations' ability to set employees up for success?

FROM STRATEGY TO IMPLEMENTATION

ESTABLISHING THE STRATEGY

**CREATING DIRECTION**

ENABLING EMPLOYEES

MEASURING SUCCESS

STRUCTURE YOUR TEAM FOR SUCCESS

STRUCTURE AROUND PARTNERSHIPS

Establish strong relationships across teams with interconnecting dependencies or who frequently partner on large initiatives.

For example, multiple teams working on a pilot initiative could consider establishing tiger teams of experts or set up frequent stand-ups to build relationships and ensure cross-functional insight in to work
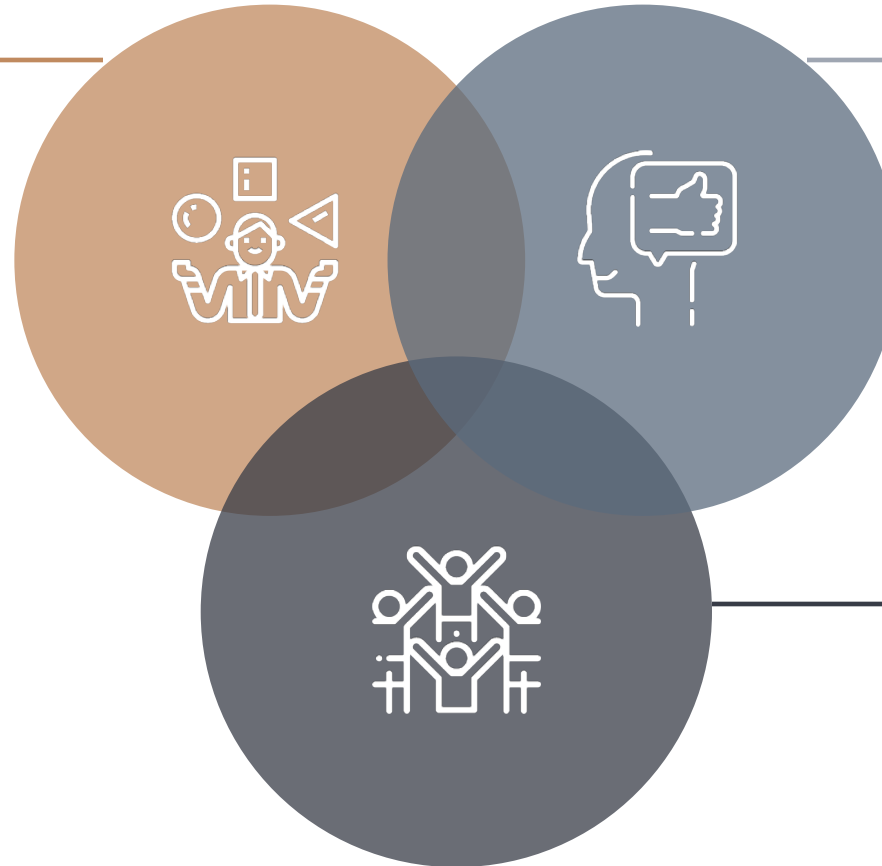
UNDERSTAND TEAM STRENGTHS

Each individual on your team has different strengths and experiences. Structure in a way that creates opportunities for your highly-skilled team members to share their experience with newer or less experienced team members.

For example, find opportunities to pair Jr and Sr team members on large projects.

PLAN FOR SCALABILITY

High-throughput organizations need to be structured for scalability, especially as demand changes and work increases with business uncertainty.

For example a Data and Analytics organization should break down siloed expertise where possible and train people to work across multiple categories.

EMPOWERING EMPLOYEES TO DO THEIR BEST WORK

Enabling your employees to be as efficient and effective in their roles, to make fast and smart decisions, and grow their skills and relationships to ensure success

TOOLS

Ensure employees have the proper tools, systems, and processes in place to be effective in their jobs

DATA

Ensure employees have access to the right data as priorities change to allow for fast and reliable decision making

TRAINING

Enable learning and training on new tools and technologies through formal courses or stretch assignments that align to business needs and employee passions

OPPORTUNITIES

Establish the space/ opportunities to collaborate that lead to effective relationship building and collaboration amongst employees

POLL #5

Rate how well your organization measures its most important objectives.

FROM STRATEGY TO IMPLEMENTATION

ESTABLISHING THE STRATEGY

CREATING DIRECTION

ENABLING EMPLOYEES

MEASURING SUCCESS

USE CASE #3

The organization has re-aligned but is unclear about its effectiveness and adoption

MAIN CHALLENGE
Understanding business success as well as employee experience

INTENDED OUTCOME
Gauge the success of alignment efforts by implementing strategic KPIs

RISKS
Poor data quality results in inability to ascertain success of initiatives

IMPACT
Uncover business inefficiencies, employee dissatisfaction, etc.

MEASURING SUCCESS BY LEVEL

PROJECT

- *User Adoption*
- *Sentiment*
- *Utilization*

PROGRAM

- *Budget*
- *Time*
- *Change Saturation*

ORGANIZATIONAL

- *Revenue*
- *Growth*
- *Customer Satisfaction*
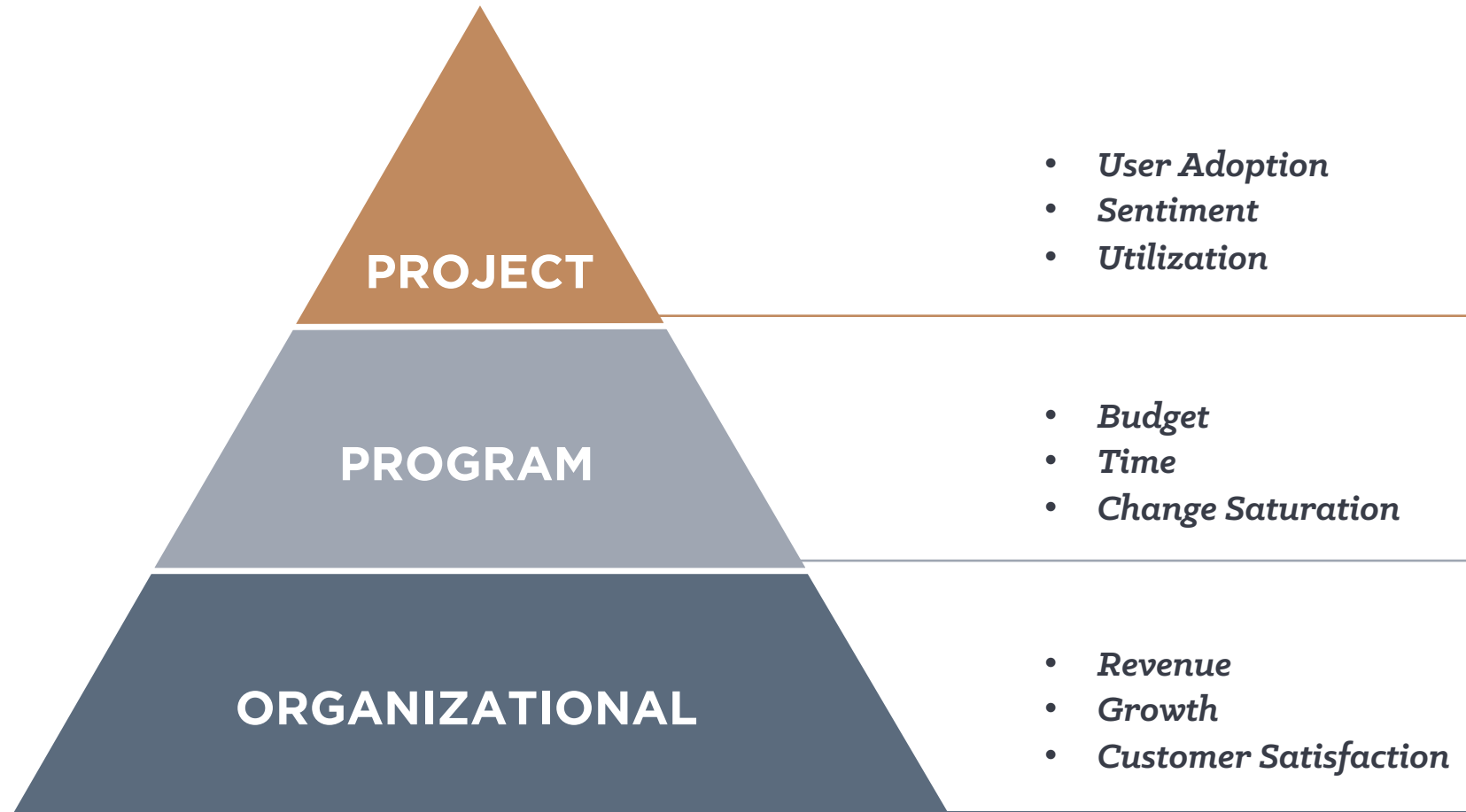
KEY ACTIVITIES — MEASURING SUCCESS

ESTABLISH

❑ Determine KPIs based on overarching organizational objectives (i.e. revenue, growth, customer satisfaction, etc.)
  ❑ Business
  ❑ Customers
  ❑ Employees

ENVISION

❑ Understand how your organization measures up against each of the objectives
❑ Ensure that all KPIs cascade throughout the organization (i.e. how do project KPIs relate back to organizational KPIs)
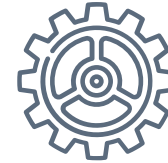
ENACT

❑ Roll out KPIs
  ❑ Organizational
  ❑ Program
  ❑ Project
❑ Establish process
  ❑ Ensure tools are in place
  ❑ Determine tracking cadence

EVALUATE

❑ Understand if KPIs are on track or behind and adjust accordingly
❑ Provide feedback loop to adopt learnings from KPIs

FROM STRATEGY TO IMPLEMENTATION — KEY TAKEAWAYS

ESTABLISHING THE STRATEGY

CREATING DIRECTION

ENABLING EMPLOYEES

MEASURING SUCCESS

Pivot to channels and/or products to meet customer demand

Share the vision and establish the governance needed to execute on the strategy

Ensure employees are set up for success by providing structure, enablers, and experiences

Measure the effectiveness of your initiatives and adjust as needed

ALIGNING YOUR TEAMS
TO MEET CHANGING BUSINESS
REQUIREMENTS

QUESTIONS?

JOIN US FOR OUR UPCOMING TOPICS!

DESIGNING YOUR FUTURE WORK ENVIRONMENT WITH AN EMPLOYEE-FIRST LENS

ALIGNING TEAMS TO CHANGING BUSINESS PRIORITIES

AUGUST 19TH

RESPONSIVE AND NIMBLE PLANNING IN THE NEXT NORMAL

MOVING FORWARD: LEADING PEOPLE AND ORGANIZATIONS

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ORGANIZATIONAL ALIGNMENT FACTORS

STRATEGY ALIGNMENT

- **Corporate Mission And Vision –** Assessing the organization to validate that their priorities and direction are aligned to the Corporate/broader company's Mission, Vision, and strategies.

- **Org Strategy Alignment –** Re-aligning the organization and team strategy to support corporate objectives.

DIRECTIONAL ALIGNMENT

- **Leadership –** Ensuring leadership best practices are in place to allow for employee coaching and career development, clear communication around strategy and decision making, and ensuring that teams are performing at a high-level, uninhibited.

- **Governance –** Establishing governance processes to ensure teams and individuals are working on the right tasks, at the right time, to best support the organizations objectives. Including intake and prioritization processes that allow for project evaluation and transparency, establishing processes that support the way teams take on work and engage, optimizing workflows, creating clear roles and responsibilities, and establishing metrics to drive improvement.

FOUNDATIONAL ALIGNMENT

- **Structure –** Using organizational design concepts to align in a way that eliminates unnecessary friction across teams and partners, facilitates relationship building, ensures teams can be adaptive, and that allows for scalability, especially in high-output organizations that have work that ebbs and flows with the business.

- **Enablers –** Validating that employees have the right tools to be effective in their jobs, the right data to enable fast and reliable decision making while minimizing approval channels, and the space/opportunities to collaborate that lead to effective relationship building and collaboration.

- **People + Experience –** Ensuring strategies are in place to ensure your greatest asset, people, are working in an environment that empowers, is engaging, and limits attrition. Beyond validating that employees are supported through leadership, governance, structure, and enablers, organizations should also assess critical factors to retaining talent, including creating a connected community, offering career wayfinding, establishing recognition channels, and ensuring they have a sense of purpose, the opportunity to work autonomously on meaningful work, and that they're able to master their craft.

COMMUNICATION PATHWAYS

| JUL '20 | AUG | SEP | OCT | NOV | DEC | JAN '21 | FEB | MAR | APR | MAY | JUN | JUL '21 | AUG | SEP | OCT | NOV | DEC | JAN '22 |

PHASE II ROADSHOW

PHASE III ROADSHOW

FS INTERNAL SOCIALIZATION

FS TRAINING PLAN FINALIZATION

FS TRAINING PLAN ACTIVATION

PHASE I CURRENT STATE WORKSHOPS

PHASE II CURRENT STATE WORKSHOPS ★

PHASE III CURRENT STATE WORKSHOPS

PHASE IV CURRENT STATE WORKSHOPS

PHASE I FUTURE STATE WORKSHOPS

PHASE II FUTURE STATE WORKSHOPS ★

PHASE III FUTURE STATE WORKSHOPS

PHASE IV FUTURE STATE WORKSHOPS

MILESTONE 1

PHASE I COMMS ACTIVATION:
- Manager Training
- 1:1 Conversations
- Announcement
- Follow-up Training

POST ACTIVATION SUPPORT

MILESTONE 2

MILESTONE 3

PHASE II COMMS ACTIVATION:
- Manager Training
- 1:1 Conversations
- Announcement
- Follow-up Training

POST ACTIVATION SUPPORT

PHASE III COMMS ACTIVATION:
- Manager Training
- 1:1 Conversations
- Announcement
- Follow-up Training

POST ACTIVATION SUPPORT

◆ ACTIVATION   ● LEVEL 1   ● LEVEL 2   ● LEVEL 3   ★ STEERING COMMITTEE

SAMPLE RACI

	SP&PM	PRODUCT	TRUST OPS	COMMUNITY POLICY	BUSINESS AFFAIRS	PRIVACY	SAFETY	BUSINESS	DESIGN	VP OF TRUST
	I	A/R	C	C	I	C	C	C	A/R	C
	I	A/R	C	I	I	I	I	C	A/R	
	I	A/R	I	I	I	I	I	C	R	I
			R	R	R	R	R	C	R	A
			R	R	R	R	R	R	R	A
	I	I	I	I	I	I	I	I	A/R	C

RESPONSIBLE   **A**CCOUNTABLE   **C**ONSULTED   **I**NFORMED