Aligning Goals, Resources, and People for Successful Change: An Interview With Tom Robertson, Ph.D.

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If you are contemplating organizational change and desire sustained, positive results, there are many factors to consider and steps to take. This post focuses on the concept of alignment. Over the years, Thomas V. ("Tom") Robertson, Ph.D., has led many change initiatives in corporate contexts, including at Bell Laboratories, Lockheed Martin.....

If you are contemplating organizational change and desire sustained, positive results, there are many factors to consider and steps to take. This post focuses on the concept of alignment. Over the years, Thomas V. ("Tom") Robertson, Ph.D., has led many change initiatives in corporate contexts, including at Bell Laboratories, Lockheed Martin (where he was director of engineering and chief scientist), and Atlantic Aerospace where he was vice president and general manager. Tom is founder and principal at Thinking Teams, a Portland, Oregon area-based consulting firm focused on developing successful leaders and organizations and helping them meet their objectives.

JATHAN JANOVE: When you talk about successful organizational change, you emphasize "alignment." What is "alignment"?

TOM ROBERTSON: Alignment is a form of organizational harmony in which the various parts, aspects, and people involved in a project come together. Successful change requires such harmony, or alignment.

JJ: Are there different types of alignment?

TR: There are four kinds:

- individual alignment;

- interpersonal alignment;

- project alignment; and

- enterprise alignment.

JJ: Tell us about each.

TR: Individual alignment means that each person involved in a project takes responsibility to be in touch with his or her own personal passions and priorities, and works with the

organization to create roles and assignments that contribute to his or her fulfillment.

Interpersonal alignment centers on the quality of team-member interactions, which are fundamental to constructive engagement and meaningful progress. Have protocols been established for open, respectful communication and constructive resolution of differences? If so, are they being followed? As a project leader, I often have had to intervene in or mediate conflicts between other team members. It's striking how often their criticisms mirror each other, and are based on differences in styles and approach instead of substantive facts or positions. That's why I tend to focus on interaction dynamics—coaching coworkers to anticipate, openly discuss, and defuse these unnecessary conflicts before they start. **Project alignment** addresses the sorts of tools and protocols that allow teams to function as if with one mind. Big projects have lots of details, and even the smallest details can have a huge impact on outcomes. For example, the disastrous loss and disintegration of the robotic space probe, Mars Climate Orbiter, in 1999 were traced to the fact that software engineers had been working on various aspects of the project using two different units of measurement.

Project collaborators must be in continual communication throughout the course of the project about whether the tools, resources, and measurements are appropriate to the mission and properly calibrated. Are they efficient, value-added devices—or are they unnecessarily time-consuming? Do they keep the stakeholders aligned—the people who do the work, the leaders, the funders, the users—as the project navigates the road leading from the desired to the possible? We typically don't know as much up front as we think we do. Hence, we must be open to making ongoing adjustments. **Enterprise alignment** concerns the organization's overall vision, values, and standards. It's not so much what these enterprise-definers are, but whether they are understood and embraced by each project and each team member. For example, at Apple under Steve Jobs, design simplicity was paramount. The alignment of all projects in accordance with this enterprise standard created powerful innovation.

JJ: What do effective leaders do to achieve alignment in their organizations?

TR: Four practices of the best leaders come to mind:

- They encourage personal development in their organizations and embrace coaching as part of their roles. They understand the power harnessed when individuals doing their jobs are also fulfilling their own intrinsic goals and aspirations.

- They model the behaviors they desire to see, such as openness and transparency and foster a sense of collaboration over competition.

- They ensure that the right tools and resources are available, being used, and are customized to meet the needs of a project and the people working on it. They invest resources to ensure that information systems are effective and available for use.

- At the highest level, they provide a symbolic framework enabling shared vision and passion to radiate across the organization. They empower and engage their employees while maintaining a balance between structure and flexibility that keeps projects and deadlines straight and delivers on commitments.

JJ: Do you have other suggestions to align team effort?

TR: Continue to pay attention, keep your ears open, and seek feedback. Avoid the mistake many executives make by interacting with only a select few, thereby insulating themselves. Don't surround yourself with people who think just like you do. Be aware of confirmation bias, which is the tendency to interpret events, actions, or results according to our preconceived notions, as opposed to seeing events more accurately. Alignment is not easy and requires sustained attention. However, when it is achieved, the organization is "in the flow," and the payoff is well worth the effort.

Thomas V. Robertson, Ph.D., is a principal at Thinking Teams and can be reached via Thinking Teams' website.

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