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Strategy Alignment Map: The Ongoing Development of a Program Management Tool

Paul Jensen, Roberta Jannsen, Thomas L. Zeller, and Enrique Venta

Abstract

This article explains the development and continuous modification of a tool that can be used to improve both participant experience and faculty performance in Executive Education programs. This tool is the Strategy Alignment Map (SAM). Participants that use the SAM create a document that summarizes 1) their strategic purpose for attending a program, 2) specific learning outcomes and how they align with their strategic purpose, and 3) action steps for implementing the learning. Executive Education, faculty and the Dean all benefit in different ways from this tool that improves participant educational experiences.

Introduction

Executive Education participants attend courses for a wide variety of reasons. Some people attend for their individual professional de-

velopment, others attend as representatives responsible for translating deliverables back to an organization, and yet others attend in search of tools and techniques that may help develop a particular business strategy. Whatever the reason, practical deliverables are the desired outcome. This article shows how the Strategy Alignment Map (SAM) can be used to improve the deliverables each participant receives from the Executive Education training. In other words, participants walk away with a road map of learning.

Executive Education administrators face three distinct challenges. First, it can be challenging to get faculty to focus on practical deliverables, as many concentrate on providing content with little attention given to practical application. This problem is exacerbated in survey courses such as mini-MBAs, where programs typically consist of a wide variety of session topics (e.g., Human Resource Management, Managerial Accounting) taught by several different faculty, each with their own teaching style and differing experiences working in team-based courses and/or with Executive Education audiences. This combination of session and instructor variability makes it problematic to provide consistent, coordinated deliverables.

Second, participants attend programs for different reasons. Some are sent to fulfill organizational objectives and some come for personal development. Often these reasons are

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not well articulated and the participants have only a vague or general goal for attending (i.e. “to become a better manager”). Participants that lack such a focus cannot maximize their educational experience.

Third, participants attend the individual sessions with a wide variety of specific needs and desired takeaways. It is very difficult for the program administration to ascertain all these needs and communicate them to the respective faculty. However, to the extent that communication occurs, the sessions become more relevant and satisfying to the participants.

Education professionals know when these three challenges are successfully addressed the opportunity for a powerful and practical learning experience is greatly enhanced (See Exhibit One).

The challenge for Executive Education departments has been to find a way to address these issues and to create programs that supply concrete and practical deliverables for their participants. Finding a solution requires combining the research findings of problem-based learning and the experience of executive education administrators and faculty. Combining these resources has led to the creation of a tool that has been labeled a Strategy Alignment Map (SAM) (See Exhibit Two).

Successful businesses have long recognized that aligning focused, discipline-based strategies enables concentration of energies on plans that mutually support and further their overall business strategy. The SAM applies this principle to improve the educational experience of organizations and/or individuals by:

- Producing a document for participants that summarizes their purpose or strategic goal for attending the program,

- Identifying specific learning outcomes and how those outcomes align with their overall purpose for attending
- Identifying action steps or a plan for implementing the learning.
- Providing a feedback mechanism to faculty regarding specific participant needs beyond the theoretical subject matter alone.

The following sections provide a brief literature review building support for why the SAM improves participant learning, a detailed illustration showing how it was developed and used in an Executive Education program, its implications for addressing broader School of Business Administration educational issues, and concludes with a discussion regarding the lessons that have been learned in using the SAM as a tool to support higher levels of learning by participants.

Educational Theory

A condition that drives the success of the SAM is participant ownership of the learning process. This begins upon registration, long before the first day of class. Participants are asked to delineate their overall purpose or strategy for attending the respective educational program. This may necessitate a meeting with others in their organization. This interaction alone brings to the attention of the organization’s leadership that they are attending a high level strategic offering, elevating both the course and the individual, their educational pursuit, and its importance to the organization.

The delineated reasons for attending a program are many, ranging from individual development to sophisticated organizational strategic reasons. Participants are asked to write this purpose/strategy in the center circle of a blank SAM (See Exhibit Two). Following each session, participants are asked to record what they learned for the day and to document how it aligns with their purpose/strategy. For example,

in Exhibit Two the participant attended the mini-MBA to learn how to increase revenues while controlling expenses. The Managerial Accounting session supported this goal by showing the participant accounting numbers in the contribution margin report format and how to use ratios as standardized measures, thus better understanding how to control expenses. (Further sections in this paper provide clear steps).

Several literature bases provide support for having the participant make explicit their educational purpose for attending a respective program and to document what they have learned. The general trend in pedagogy in Executive Education is toward greater learner involvement, especially through action learning projects (Stopper, 1998 and Conger & Xin, 2000). Noel & Charan (1998) report that "Here action learning refers to a variety of management-education approaches in which managers use issues from their own companies as the basis for learning. These programs typically involve team-based experiential exercises, aiming to solve real-life problems with immediate relevance to the company". Overall, this research suggests that adult learners in Executive Education programs are going to be more motivated if there is applicability of the learning to their career and/or organization's needs.

Two studies in the problem-based learning literature support why learning improves when participants note reasons for attending and document their learning progress. One study supports using problems to focus learning, thus solving real issues while learning concepts (Milne & Connell, 2001). Another study finds "One of the stronger arguments in support of problem-based learning, however, is not the skills it develops in participants, but rather that it provides a learning experience that is much akin to the way cognitive psychologists suggest people successfully acquire, retain and recall knowledge" (Norman & Schmidt, 1992). Thus,

there is ample evidence supporting the SAM process.

Strategy Alignment Map: Initial Application

A number of challenges were encountered during this implementation that ultimately forced a significant revision of how the SAM was implemented. The initial application of the SAM was in a survey program comprised of ten sessions using eight faculty members. The course began with an orientation in which participants were provided with a blank SAM (See Exhibit Two). An Executive Education administrator explained that this would become a personalized SAM they would construct over the course of the program. Participants were asked to enter their organizational strategy in the center circle and told that as the course progressed they should list relevant strategies they learned from each session in the boxes around the periphery. These peripheral strategies would support the central strategy and need to be aligned with it as well as with the other peripheral strategies. As a visual reminder, two-way alignment arrows are used to connect the peripheral boxes with the central circle. They were then told that faculty would close each session using the SAM to reiterate takeaways, solicit comments, and discuss how the identified strategic takeaways supported participants' organizational strategies.

During orientation, it became apparent that many participants were unclear about what was meant by an organizational strategy and were not prepared to supply one for the center circle. Additionally, participants that were not attending on behalf of an organization did not think this pertained to them. Without a clearly defined overall strategy, participants would not be able to identify appropriate supporting strategies from each session.

Another component of our process was to teach faculty to use the SAM and rely on them

covering it with the participants in the last 15 minutes of each session. This presented another problem, as faculty did not consistently integrate the SAM into their summaries. Some faculty did not use it, while others forgot to use it or forgot the prescribed method for using it. Those who complied treated it differently session to session, i.e. some simply read aloud the expected strategic takeaways without soliciting input, some weaved the takeaways into abbreviated session summaries mentioning the SAM, and a few correctly used the SAM as intended. In all cases faculty left insufficient time at the end of class to address the SAM completely.

Confused with the inconsistent treatments, many participants decided the SAM was not an important component of the program and stopped participating in the process. We addressed the SAM problem with the remaining faculty but the damage had been done and the SAM did not play a major role for any of the participants in that our first implementation.

Strategy Alignment Map: Revised Application

Lessons were learned and substantial improvements were made following the initial application of the SAM. It is important to share these developmental experiences with other Executive Education departments to help improve the overall product of the industry.

To address the problems encountered, several changes were made. First, an explanation of the SAM was included with the confirmation materials sent to participants upon registering. This gave them the opportunity to learn the process and contact us with any questions they had about their individual and/or organizational strategies. Second, a template of a completed SAM with examples of individual and organization strategies was provided for the participants to use as a reference. These steps

appear to have eliminated the confusion encountered in the initial application.

Addressing the treatment of the SAM in the classroom, Executive Education administrators replaced faculty as leaders of the SAM discussion. In practice, faculty are asked to conclude their instruction approximately 15 minutes before the end of their session. During those final minutes an Executive Education administrator asks the participants to take about 5 minutes to enter in the respective session box what they learned and how it supports their organizational or professional strategy. Once they have done this a few volunteers are asked to share what they documented. The volunteered comments are written down on the front board and often draw out new insights for the other participants. These shared insights can result in participants changing or adding to their original takeaways as they provide a basis for a new way of looking at the topic. In addition, faculty members remain in the classroom for this process since it provides them immediate feedback on what was learned for the session.

Often participants come to a program with a particular need or a desire for development of a business strategy. By documenting targeted learning, that specific training need gets met. A one-way arrow on the SAM diagram would thus be appropriate. However, as the sessions unfold, new insights and integrated thinking develops. Referring to Exhibit Two, once the accounting topic is developed, the importance of why and how to conduct a cost/benefit evaluation of different marketing techniques becomes a important component of identifying how to increase revenues while holding down expenses. Beyond, the participant will begin to see that one form of marketing with a particular cost structure is appropriate for one strategy, while a different form of marketing with a particular cost/benefit structure may be appropriate for a different business strategy.

This may change their thinking on one strategy over another. This is the reason for including the double-headed arrows on the SAM. This revised SAM application model led to a better educational experience for the participants and immediate learning feedback for faculty, thus the SAM was integrated into the remaining survey programs.

Application Beyond Executive Education

All Deans face issues similar to those which face Executive Education, but on larger scales. Coordinating faculty to think about integrated participant educational needs at the program level and in curriculum is a distinct, ongoing challenge. The Dean recognized that the SAM requires Executive Education faculty work together to integrate subject matter across departmental lines, which is a marked departure from the discipline-specific silos in which so many of them have been professionalized. As they become more familiar with what other Executive Education faculty members teach, they are able to tailor their materials to support and cross-reference one another, which in turn makes Executive Education programs more cohesive.

The Dean understood that if the SAM could be used to initiate the coordinated effort of a select group of faculty, then it might have potential to do the same throughout the entire business school. Experience with the SAM over time will point to its potential application supporting these organizational goals of producing an integrated educational experience for participants and developing faculty who work collaboratively and understand and communicate strategic direction. Further, the successful experience of Executive Education provided powerful evidence to the faculty of the value of coordinated thinking.

Summary

While modifications are still being made to the Strategy Alignment Map, the benefits experienced have been well worth the effort. Executive Education, the faculty and the Dean have all benefited greatly from the improved educational experience for the participants.

Where participants once returned to work with a jumble of facts, strategies, and tactics, proper use of the SAM equips them to return able to articulate specific strategic decisions and how these will further organizational or professional goals. They also enjoy a more consistent program. With multiple sessions and faculty, survey courses can be somewhat disjointed with little unifying structure. The SAM unifies a program by bringing to the classroom a consistent approach of identifying takeaways and planning strategic applications. While individual sessions play an essential role in the building process, the SAM focuses the participant on the overall learning that occurs throughout the program. Although there is anecdotal affirmation of the above benefits for the participants, part of ongoing improvement will include adding an assessment of these perceived benefits to the evaluation process. Past program participants who used SAM will also be queried to identify the benefits from their perspective.

The application of the Strategy Alignment Map has solidified the role of Executive Education as a partner in the process of addressing educational and organizational challenges. With experience and a proven track record the SAM also represents a tool that deans may use to bring together faculty focusing efforts on integrated learning. The SAM is a dynamic tool with many applications waiting to be explored.

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Exhibit One

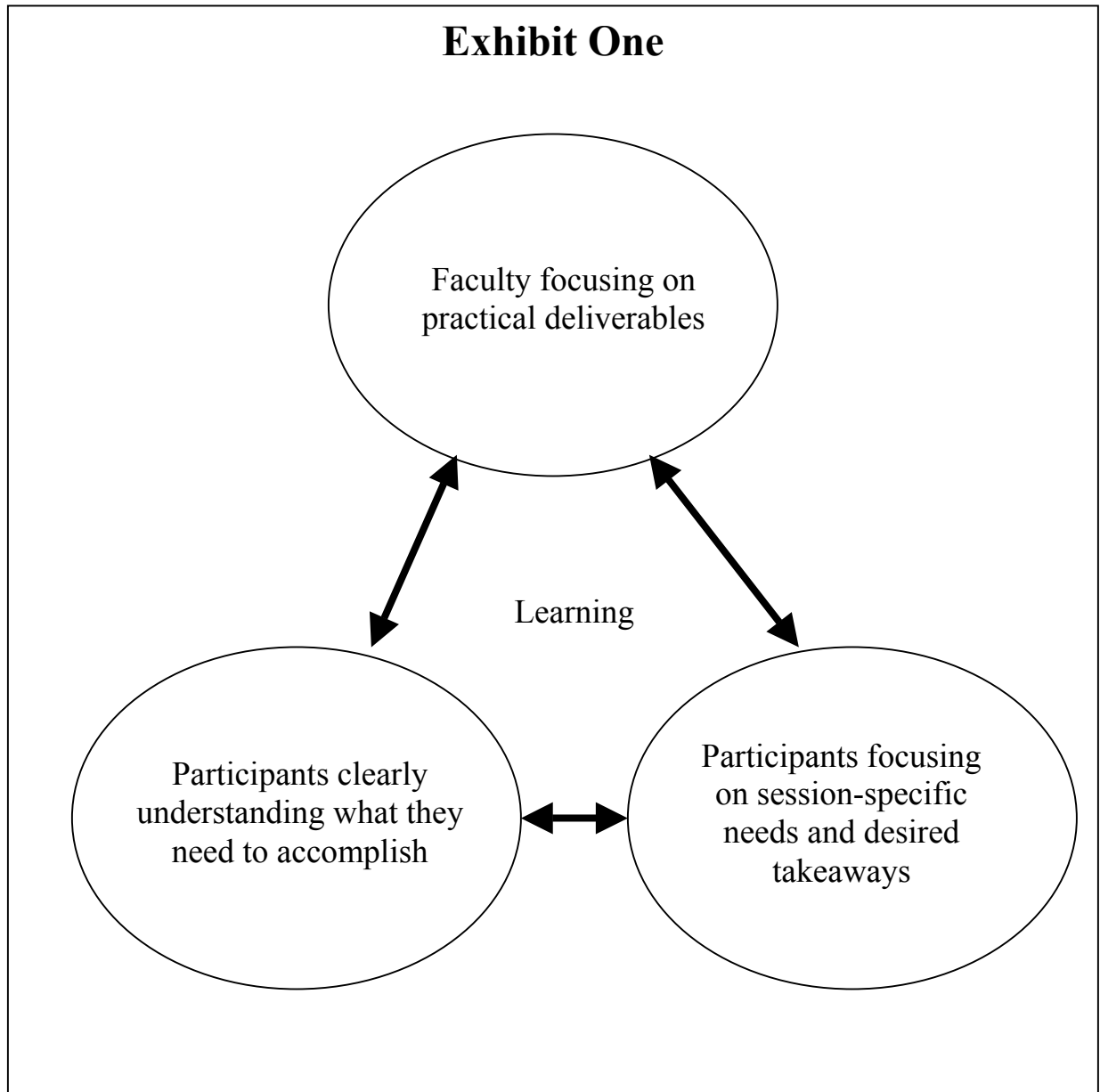


Exhibit Two

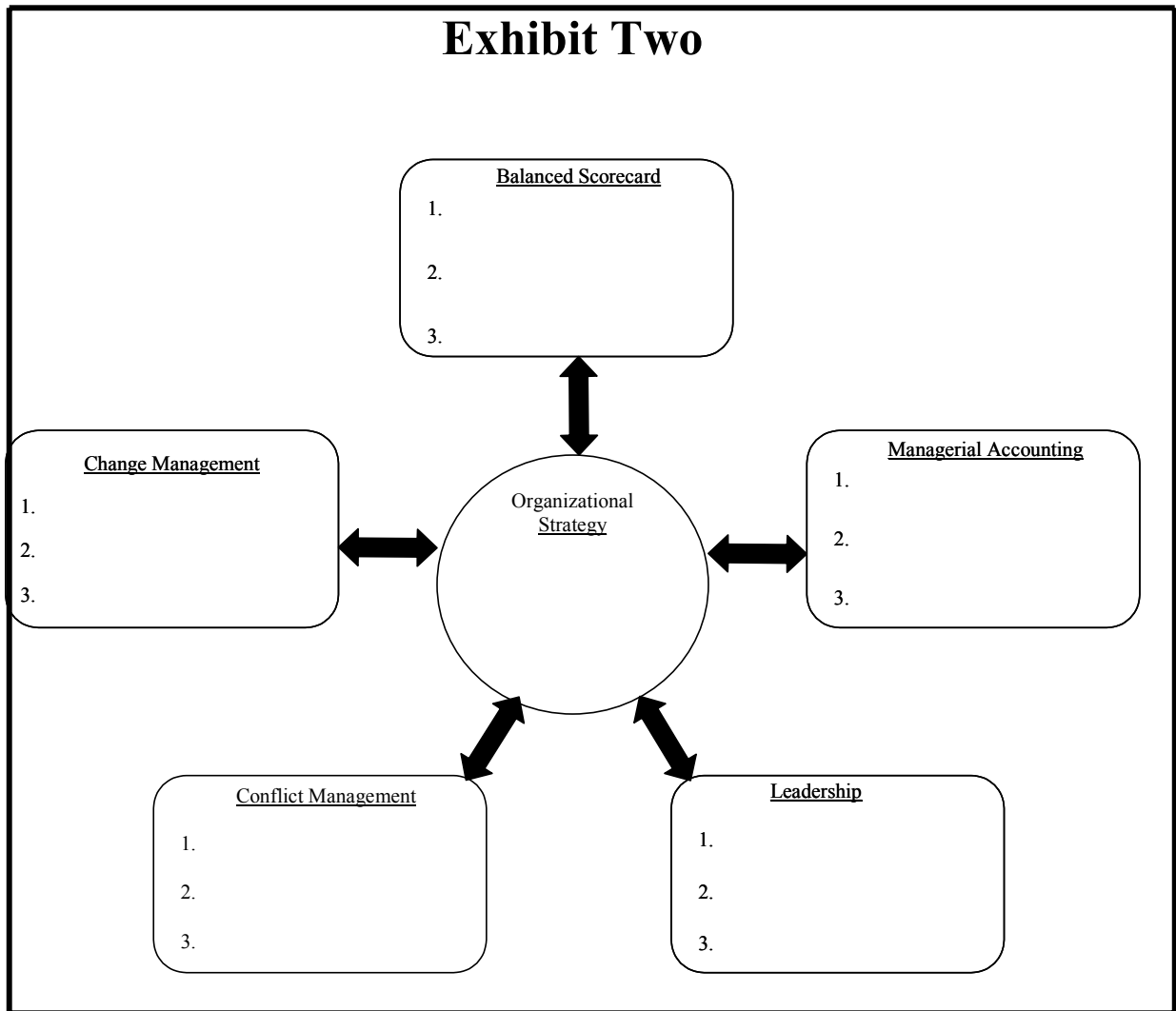


Exhibit Three

