**BALANCED SCORECARD INSTITUTE**
Strategy Management Group

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## Alignment Optimization (AO) Executive Education – Webinar Q&A

| Question | Answer |
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| **Application of AO** | |
| *Would AO be an appropriate set of methods to collaborate with customers and/or suppliers? Examples?* | AO is used in customer/supplier relationships. There are suppliers who embed AO in their multi-year contracts, and customers who require their suppliers to use AO – in both cases to provide measurement and maximization of alignment within and between their two communities.  CPG companies use AO, their suppliers, IT and other outsourcing companies, for example. |
| *Do you have any clients in the government?  How has it been received?* | Yes. There are references and case studies at the federal, state and local level. |
| *What about the corporate alignment? I mean SBUs alignment* | Alignment Optimization (AO) was designed for any pair or network of relationships. AO is used to maximize alignment between corporate and SBU entities, and between SBU's. |
| **Access to AO** | |
| *Training is where and how much?* | The next training is Sep. 15th and 16th near Philadelphia, PA, for $1995 per student, discounts for 2 or more. Open courses are run four times per year. |
| *Do you teach the workshop at a company's worksite?* | Yes, for groups of 4 to 50, we will run the AO course on site. |
| *Are there any online courses, as it is difficult for me attend courses in some of the specific locations?* | As alignment is a characteristic of a group, and the AO executive education is exercise based, there is no self-service, distance learning mode currently available. |
| *What are required to get the train the trainer status on AO?* | SchellingPoint will certify others to provide AO education in a train-the-trainer model. Please contact mtaylor@schellingpoint.com |
| *Do you have any intention of collaboration with e.g. south African business schools to share the learnings?* | Please contact mtaylor@schellingpoint.com to discuss the business school use of AO. |
| **Next Steps with AO** | |
| *Will we get a copy of this presentation, I want to take it to my boss.* | Yes, a link to the webinar recording was sent out to all registrants, plus the slides have been distributed. Contact info@balancedscorecard.org if you have not received them. |

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| *If you are in an organization where you are not in the C-Suite, yet recognize the impact that exists because of alignment issues, how can you best bring this to surface?* | Send them the link to the 5-minute Introduction to Alignment Optimization video: https://vimeo.com/66260466 <br><br> Invite them to peruse www.schellingpoint.com and learn about the new AO solutions. |
| *What about the associated software? Is it a B-S product...from SchellingPoint?* | The Alignment Optimization Technology (AOT) is internet software developed and supported by SchellingPoint. Please visit www.schellingpoint.com to learn about AOT and contact dwilsey@balancedscorecard.org  to see a strategy case study. |
| *In striving for alignment with a Strategic Plan do you make any distinction between objectives and goals or can they be used interchangeably?* | Unfortunately these phrases are defined to mean different things within different models (i.e., *goals* can equate with strategic results, objectives, initiative milestones, or even targets, depending on the model). The phrase *goal* is not used in the *Nine Steps to Success*™ framework, but typically translates most closely with *Strategic Results*, which are the end outcomes from successfully executing the organization's strategy. Strategic Results can be broken down into a series of *Objectives*, which are the specific continuous improvement activities that break down strategy into smaller components and make strategy actionable. |
| **Theory of AO** | |
| *It seems that Systems Thinking and Complexity Theory are close 'intellectual Cousins' of AO. Does this come up in conversation?* | AO's authors are teachers of both these models, and agree they are related. It occasionally comes up in conversation. |
| *Are we not saying effectiveness or otherwise of communication is at issue here?* | We are saying that interactions between people trying to agree what actions to take around a shared topic are more efficient and more effective when one or both parties are aware of AO's concepts and use the AO methods. |
| *Do you find that behavioral patterns and personality types play into the alignment or misalignment?* | Once surfaced, the display of non-like-mindedness and the method for converting it into endorsed action, is designed to neutralize negative personality types which don't contribute to the advancement of the group's shared purpose. |
| *How does this align with team role theory (Belbin)?  Is it consistent?* | There is no correlation between AO's methods and Belbin, non-Belbin team roles model, or common models such as DiSC and Myers-Briggs. AO is entirely 'topic-centric'. |
| *If you had to describe AO in two words, what would they be?* | Succeeding More, Effective Collaborations, Efficient Alignment 'Groups getting much more done for much less effort' (Sorry, that's 9, but technically *Alignment Optimization* (AO) is already two words) |

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| *Beside books of Norton and Kaplan, can you suggest any other book about BSC? More practical book or material?* | BSI published its own book last year called *The Institute Way*. See www.balancedscorecard.org/TIW for more.  In terms of AO, SchellingPoint was partially derived from the work of 2005 Nobel Prize recipient, Prof. Thomas Schelling. The first half of *Strategy of Conflict* is valuable reading around likemindedness. *Micromotives and Macrobehaviors* is another reference. |

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| *AO resonates strongly. Thanks for the introduction!* | Thank You. Feel free to learn about the range BSI products and solutions at www.balancedscorecard.org.  For a more extensive description of AO solutions visit www.schellingpoint.com |