

LEADERSHIP ALIGNMENT

WORKSHEET

Complete this alone, honestly, before you compare notes with anyone else on your leadership team. The point isn't to prepare a good answer — it's to find out whether your team is actually aligned, or just assumes it is because nobody has ever compared notes.

“Stop three people in an aligned MSP and ask what winning looks like for a given account. You'll hear the same answer, in roughly the same words.”

Do not discuss your answers with peers until your facilitator says to compare. Comparing early defeats the point — people quietly edit their answer to match what they expect others will say.

WHO IS COMPLETING THIS

Name

Role / department (Sales, Delivery, Customer Success, Leadership)

Account this worksheet is about (use your organization's largest or most important account)

1. WHAT DOES WINNING LOOK LIKE?

In your own words — not your team's metrics — what does success actually look like for this customer? Write it as if you were the customer describing it, not as your scorecard would.

2. WHAT YOUR FUNCTION IS ACTUALLY MEASURED ON

List the two or three real numbers your team is measured on this quarter — the ones that decide whether you had a good quarter. Not the ones on the mission statement.

3. THE FOUR-SENTENCE CHECK

Over the last ninety days, which of these have you said or quietly believed? Check every one that applies, and name the account or moment.

- ☐ "Let's improve Delivery first." – account/moment: _____
- ☐ "Our customers are happy, our SLAs are green." – account/moment: _____
- ☐ "Whose fault is this?" – account/moment: _____
- ☐ "Once we get through this renewal, we'll fix it." – account/moment: _____

Don't soften it and don't explain why it was justified at the time – at the time, all of them are.

4. OWNERSHIP

Who do you believe is accountable for keeping promise, expectation, and execution aligned on this account – across the whole relationship, not any single stage? Name a person, not a function.

5. READ THE CONFIDENCE, NOT THE DASHBOARD

For this account, independently of any SLA report: is the customer's confidence rising, flat, or being quietly spent? Answer before you check the dashboard, not after.

- ☐ Rising
- ☐ Flat
- ☐ Being quietly spent

What behavior, specifically, is that answer based on?

6. WHERE YOU THINK THE REAL GAP IS

If there's one place alignment is quietly breaking down between departments on this account right now, where do you think it is? Be specific — name the seam, not a person.

Facilitator instructions — do not read until all copies are collected

Collect one completed worksheet from each leader (Sales, Delivery, Customer Success, Leadership) before anyone discusses answers. Then, as a group:

- Lay every Section 1 answer side by side. Do they describe the same outcome, in roughly the same words? Or does each person's answer belong to their own department's version of success?
- Lay every Section 2 answer side by side using the scorecard-columns exercise — mark where two scorecards would reward a different decision on this same account.
- Compare Section 4. Did more than one person check the same hurdle for the same account without knowing the others would? That's a pattern, not a coincidence.
- Compare Section 4's ownership answers. Does everyone name the same person — or does no one name anyone?
- Compare Section 5's confidence answers. Disagreement here is the finding — it means the team is reading different signals, or no one is reading behavior at all.

If Section 1 and Section 4 (ownership) come back with different answers across your leadership team, that's not a communication problem. That's the Outcome Execution Gap showing up inside your own leadership team, not just the account.

Want an outside facilitator to run this comparison with your leadership team? Book an Outcome Execution Gap Session.

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