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# Aligning Tasks to Gain Maximum Advantage

by Vincent J. Granieri

## Summary

In the annals of athletic performance enhancement or physical therapy, research suggests that alignment of the skeletal system through a combination of training, stretching and therapeutic massage of the muscular system will result in higher performance levels and better overall health. We also now know that upsetting the balance or alignment often causes problems that seem unrelated, but are really a result of misalignment as other parts of the body try to compensate for it.

This same concept of alignment is a vital key to managerial success as well. By integrating and aligning seemingly disparate activities, great gains ensue due to consistency of approach and economies of scale. This can occur at the personal level and at the organizational level. In this two-part series, we will explore the benefits of alignment at each level. In this first installment, we will examine the benefits of linking personal goals, prioritization and performance management. In the next issue, we will follow up with a study of gains through linking pricing, forecasting and reporting at the company level.

## The Maladies of Misalignment

Time is something we all want more of, yet everyone has as much as there is. The key then is to use the time we have to its best advantage. A good example is the dreaded annual performance review. If you are like me, your tendency is to evaluate performance (your own or others) annually at most. While some companies perform evaluations on the associate's hiring anniversary, others perform all evaluations at

the same time, usually corresponding with the end of the company's fiscal year. Even those who use the anniversary date often pay incentive compensation based on the fiscal year. For financial actuaries, this period is the busiest time of the year. It's difficult to remember everything that occurred during the evaluation period since it began a year ago. The path of least resistance for actuarial managers is to shortcut or delay the evaluation process, which has far reaching negative consequences. Either approach is an indicator of poor people management, but there are also morale issues associated with poor performance evaluations and/or negative surprises that arise therein. Further, these actions may well heighten emotional pressures at a time when ambient pressures are already too high. As much as we would like to change the timing of the process in these instances, that may not be realistic.

How do we go about modifying the system to make it work for us as managers and not against us? The solution is to align goal-setting, prioritization and performance management into an integrated process. Before we get too far into this, let me reassure you that this is not analogous to combining all the kitchen tools (the blender, the grinder, the food processor, the mixer, etc.) into one tool that takes up less space but doesn't perform any of the tasks particularly well; our goal is to improve each tool through integration, not to compromise it.

## The Planning Process

We began this discussion at the end of a planning/evaluation cycle, when it is too late to do anything but live with the consequences of past



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decisions. Let's journey back to the beginning of the fiscal year, or even a little before then, to the middle of the planning process. A typical goal of the planning process is to develop objectives for the company. If we are interested in perfect alignment, we do not stop there. Each division or department can develop its goals to line up behind the corporate goals. Each work group can align its goals with the departmental goals and each associate can develop his or her individual goals to support the goals of the work group.

Questions arise regarding whether repetitive work, such as preparing financial statements or performing cash flow testing, belongs on the objectives list. It is important that all tasks with-in reason are included because the goals document forms the basis for all that will follow.

### Prioritization

This is perhaps the most difficult part of the integrated advantage. It's been said many ways; for example, it's not about doing things right, it's about doing the right things. Let me suggest that it's definitely not about to-do lists, at least the traditional endless variety where no task stands out above another. The traditional to-do list is focused on the present and is lacking key information on prioritization. There are numerous prioritized to-do list models that encourage assigning letters and numbers to highlight the most important activities. For example, an 'A' task is of higher priority than a 'B' task and an 'A-1' is more important than an 'A-3.' This is an improvement.

I use a spreadsheet that I call "an integrated approach to priorities" (IAP) that includes

active tasks like a to-do list, but I take a different approach to it. A task cannot be active unless it meshes with my goals and for which I have adequate resources to accomplish them. Put another way, active tasks are those that are able to be worked and are being worked. So where do all those tasks from the traditional to-do list go? Possibly, they go into one of five additional categories on the IAP. A subheading of active tasks, dependencies, includes those active tasks where I am waiting on someone else's input or have delegated a critical assignment. Also on the sheet are two inactive task categories, backlog, for those tasks deemed worthy, but for which resources do not currently exist, and exploratory, for those potential tasks that have not yet been approved, but need to be judged before they are placed in backlog or active. There is also a category for repetitive tasks, those that are repeated periodically throughout the year, such as financial reporting.

Finally, there is a category for completed tasks since the last update. I update my IAP weekly or biweekly. This category is a key to aligning priorities, goals and performance evaluations, as will be seen below. Another key aspect of the IAP is that there is a deadline date listed for each item on the spreadsheet and a reference to the goal that it supports.

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The form of the tool is not the most important thing. It's the consistent reassessment of capacity and priorities that is critical. The active tasks list must only include those tasks that are being worked. Once on the active list, they are completed or replaced by backlog or exploratory tasks that are deemed more beneficial to the goals. Any changes are negotiated between affected parties.

### Performance Evaluation

Assume that the prioritization cycle has repeated itself through many weekly or biweekly cycles. In each cycle, tasks move from active to completed, new tasks appear on the exploratory or backlog lists and move to the active or dependencies lists and then to completed. Dates are met and dates slip.

It's now time for an evaluation. What I (and my boss or subordinate) now have in front of me is a stack of IAPs in chronological order that documents everything related to assigned tasks that were performed over the evaluation period. With the references to goals embedded in the system, it is easy to measure progress made toward each goal and whether it has been accomplished. Along the way, there has been plenty of time to adjust for the unexpected. Most importantly, these adjustments take place while the facts are fresh in everyone's minds, not months after the fact. Accordingly, there are few surprises, if any.

### Conclusion

The benefits of aligning goal-setting, prioritization and performance evaluation are evident. Why don't more managers reap these benefits? It all comes down to discipline and desire. The costs are up front and the benefits are down the road. If you weigh the costs and the benefits, however, you will see that time spent today

saves exponentially more time tomorrow when time is at a premium. Next issue, we will explore how this principle can be applied to corporate activities as well. □

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