



**Align your projects to strategic goals and other  
prioritization and selection criteria in more clear and  
objective way**



# Created by...



**Adilson Pize**

- CEO and consultant on *EXCE!!ENCE*.
- Speaker.
- Guest teacher on many universities Project Management, Business Process Management and Information System Management MBA and Postgraduate Programs.
- Certifications: PMP (Project Management Professional), CBPP (Certified Business Process Professional), CSM (Certified ScrumMaster) and ITIL Foundations.
- Graduated from leadership qualification international program “PMI Leadership Institute Master Class”, 2013 class.
- Volunteer at PMI as member at PMI Technology Advisory Group (TechAG).
- Member at PMI-RS Advisory Council and affiliated to PMI-AM, PMI-GO, PMI-MT and PMI-SE (all in Brazil).
- General Coordinator at Project Management Users Group (Grupo de Usuários de Gerenciamento de Projetos – GUGP, in Portuguese) – SUCESU-RS.

# Translated from Portuguese to English by...

**Special thanks to Ana Carolina, Thiago and Ynnah** who voluntarily translate this guide into English.

Young people that are contributing to the spread of good practices in strategic and project management worldwide.

You are very special people!



**Ana Carolina Gaeta**



**Thiago Maron**



**Ynnah Marinho**

# Project Strategic Alignment

**“There is nothing so useless as doing efficiently that which should not be done at all” – Peter Drucker**

This notorious quote from Drucker reminds us that we can't only “execute the project right”, but also “execute the right project”.

In light of this, the project (as well as business processes) selection and prioritization should consider the level of alignment with the strategies defined by the organization on the strategic planning.

Worldwide researches demonstrate that organizations with high performances in projects have their projects aligned with their strategies among the core characteristics.

On the other side, researches also show that in many organizations the alignment level is low, what means that projects portfolios have in their composition some projects that are not aligned with the organization strategies.

All that usually happens by the lack of simple, clear and purposeful processes in order to select and prioritize projects.



# Project Strategic Alignment Canvas

The Project Strategic Alignment Canvas - **PSACanvas** - was developed to be a support tool for organizations in order that they can prioritize and select the projects by themselves based on the project's alignment with strategic goals, as well as in the use of the organization limited resources.

Other criteria can also be used together with strategic alignment to prioritize and select projects.

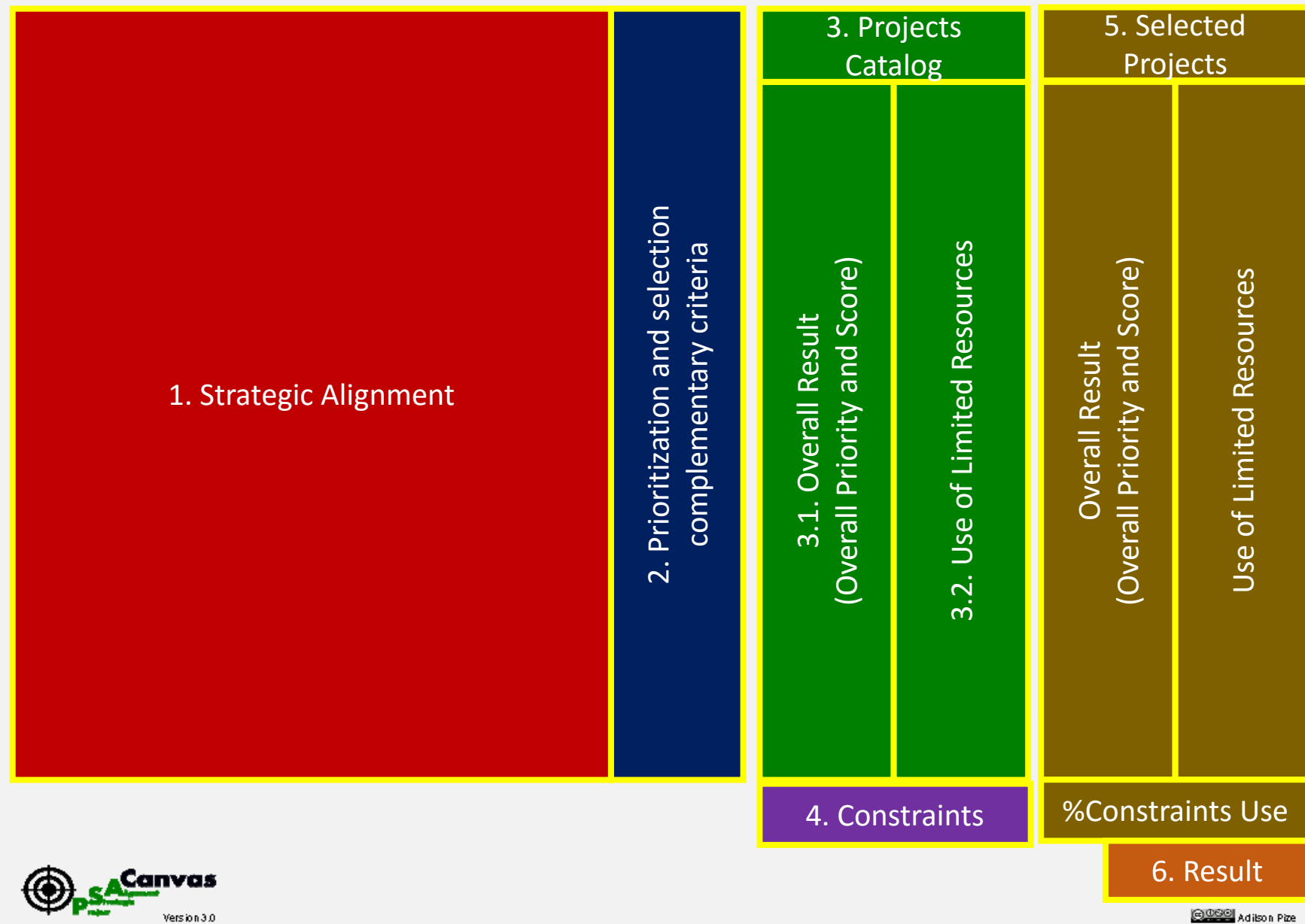
**PSACanvas** model was tested for almost 3 years in workshops all over Brazil before reaching version 3.0 and continues evolving to aggregate improvements that make the strategic alignment development process a simpler, more interactive, collaborative, efficient and pleasant process to be performed.



Goals		Strategic Alignment		Global Selection Criteria		Projects Catalog				Selected Projects				
Proposed Projects	Level of Importance / relevance of the strategic goals	weight	Weighted score	weight	Weighted score	General result	Restricted resource	Planned use	General result	Restricted resource	Planned use	General result	Restricted resource	Planned use
	Goals	Score	Weighted score	Score	Weighted score	Priority	Total Score	Resource 1	Resource 2	Priority	Total Score	Resource 1	Resource 2	Resource 2
<p>Contribution level of the projects with strategic goals</p>														
<p>Canvas Version 3.0</p>						<p>Canvas Version 3.0</p>				<p>Canvas Version 3.0</p>				

Download **PSA**Canvas at [www.canvasworld.com.br](http://www.canvasworld.com.br)

## Groups of Information



# What is needed?

The image shows a template for the PSACanvas Model, which is a strategic alignment tool. It is divided into several sections: 'Strategic Alignment' (with a table for 'Level of importance / relevance of the strategic goal'), 'Project Catalog' (with a table for 'General result', 'Strategic result', and 'Financial result'), and 'Selected Projects' (with a table for 'General result', 'Strategic result', and 'Financial result'). The template is designed to be printed on A0 paper format.

**PSACanvas Model**

(printed on A0 paper format)

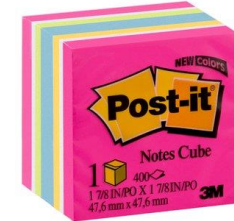
Download at [www.canvasworld.com.br](http://www.canvasworld.com.br)



Group formed by the greatest number of stakeholders: owners/shareholders, sectors managers, workers from various areas and levels, partners, external consultants etc.



## Team



Post-it (47,6mm X 47,6mm)



Marker pens  
(fine point)

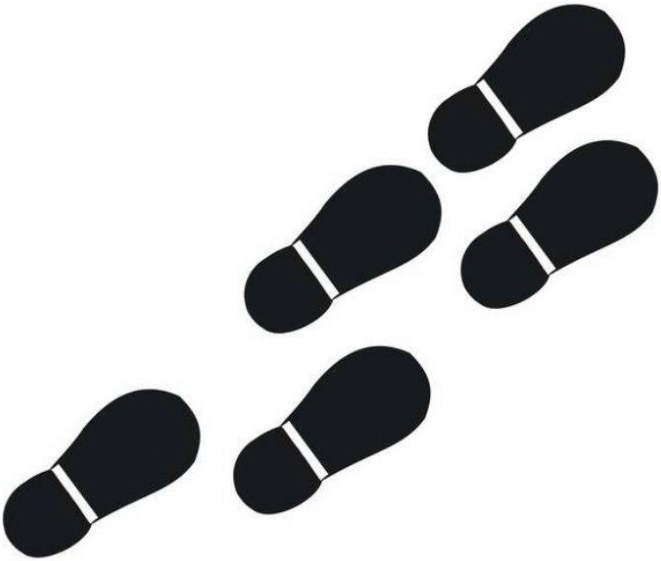
Legend:



= Tip/Advice



# Previous steps



**Strategic goals definition**

**Definition of the importance/relevance level of each strategic goal to the organization**

**Proposed projects definition**



To achieve it use Strategic Planning Canvas



Download available at [www.canvasworld.com.br](http://www.canvasworld.com.br).





## 1<sup>st</sup> step

## 1. Strategic Alignment

[illegible]

# 1. Strategic Alignment

It is natural that projects have different contribution level with the organization strategic goals.

Because of this, it is necessary to evaluate the relationship (contribution level) of each proposed project with each strategic goal.

For that:

- 1) List the projects to be evaluated vertically (first canvas column);
- 2) List the strategic goals horizontally (second canvas row);
- 3) For each proposed project, evaluate its the contribution with each strategic goal together with the team, repeating this process until every project has been evaluated.

Suggested scale for project contribution level:

0 = none

1 = very low

3 = low

5 = moderate

7 = high

9 = very high



Legend:



= Tip/Advice

Level of importance / relevance of the strategic goals				
Goal	ob1	ob2	ob3	ob4
Proposed Projects				
p1	0	5	7	3
p2	7	7	3	5
p3	3	9	7	5
p4	9	9	0	3
p5	3	5	3	5

# 1. Strategic Alignment

Strategic goals usually have different levels of importance/relevance for the company. Thus it is necessary to include the corresponding score for each goal importance/relevance right above it (first row on the column).

If there are other criteria used on projects prioritization and selection besides strategic alignment, inform the strategic alignment criteria weight (first row on strategic alignment column). If there are no other criteria in use, consider weight = 1.

**Calculate the score for each project as follows:**

Sum the result of the multiplication of the project contribution level by the importance/relevance of each goal.

Example (see project “p1” at left):  $(0 \cdot 16) + (5 \cdot 18) + (7 \cdot 24) + (3 \cdot 22) = 324$

After that, **calculate the score** by summing the score of each project.

At the end, **calculate the weighted score for each project** as follows:

Divide the project score by the total score and multiply by its weight.

Goal	16	18	24	22	Strategic Alignment	
	ob1	ob2	ob3	ob4	Score	Weighted score
p1	0	5	7	3	324	1,18
p2	7	7	3	5	420	1,53
p3	3	9	7	5	488	1,78
p4	9	9	0	3	372	1,35
p5	3	5	3	5	320	1,16
Contribution level of the projects with strategic goals					1924	



To include the strategic goal importance/relevance only after evaluating the project contribution level is a good practice to avoid team members' induction as evaluation is performed.

Legend:



= Tip/Advice

## 2. Prioritization and selection complementary criteria

[illegible]

# 2. Prioritization and selection complementary criteria



If there are up to 2 (two) complementary criteria, it is possible to split the post-its in two portions and use the column that is available in the canvas.



If there are more than 2 (two) complementary criteria, it is better to stretch (to the left or to the right of the canvas), adding columns for the complementary criteria.



It is indispensable that for each prioritization and selection complementary criteria there are clear rules to define their score.

Urgency	
Score	Weighted score
3	
8	0,73
3	0,27
5	0,45
7	0,64
10	0,91
33	

Legend:



= Tip/Advice

Other criteria can be used in the prioritization and selection of projects. Some common categories are: financial criteria, viability criteria, complexity criteria, risk criteria, compromising criteria, urgency criteria, among others.

Include other prioritization and selection criteria in the specific canvas column. In the example given the criteria “Urgency” is included.

Inform the criteria weight in regard to other prioritization and selection criteria. In the example the weight is “3”.

Indicate the score of every project for each criterion.

After that, **totalize the score** by summing the score of each project.

At the end, **calculate the weighted score** for each project as follows: Divide the project score by the total score and multiply by its weight.

### 3. Project Catalog


### 3.1. Overall Result (Overall Priority and Score)

### 3. Projects Catalog

**Calculate, for each project, the total score.** For that, sum the strategic alignment weighted score and the selection and prioritization complementary criteria weighted score.

Afterwards, **totalize the score** by summing the total score of each project.

Finally, **prioritize the projects** classifying from highest to lowest individual total score.


Projects Catalog			
	General result	Restricted resources Planned use	
	Total Score	Resource 1	Resource 2
4º	1,91		
5º	1,80		
1º	2,23		
3º	1,99		
2º	2,07		
	10,00		



### 3. Projects Catalog

The projects will require some organization resources, which sometimes are restricted.

Therefore, it is necessary to identify what resources in the organization are restricted and how each resource will be used in each project.

 Define the units of measurement that will be used to each restricted resource, so the information of use in each project is in the same unit of measurement.

Projects Catalog			
Priority	General result Total Score	Restricted resources	Planned use
		Budget	Equip. "a"
4º	1,91	\$110	3d
5º	1,80	\$200	4d
1º	2,23	\$490	0d
3º	1,99	\$350	9d
2º	2,07	\$500	22d
	10,00	\$1650	38d

## 4<sup>th</sup> step

Goals		Strategic Alignment		Other Selection Criteria		Projects Catalog				Selected Projects			
Level of importance / relevance of the strategic goals		weight		weight		General result		Restricted resources Planned use		General result		Restricted resources Planned use	
Proposed Projects	Goals	Score	Weighted score	Score	Weighted score	Priority	Total Score	Resource 1	Resource 2	Priority	Total Score	Resource 1	Resource 2
Contribution level of the projects with strategic goals													
Contribution scale 0=None 1=very small 3=small 5=moderate 7=big 9=very big													
						4. Constraints				% used of constraints Global Result (%)			

Adilson Pize

## 4. Constraints

Before evaluating and selecting the projects to be managed by the company, it is necessary to have the information of what are the available limits for each restricted resource.

So, report the available limit for each restricted resource in the canvas.

	\$1150	27d
Constraints		



To inform the resources constraints only after the definition of their use for each project is a good practice to avoid team members' induction.



The unit of measurement of the constraints must be the same used in the definition of use for each project.



## 5<sup>th</sup> step

Goals		Strategic Alignment		Other Selection Criteria		Projects Catalog			
Level of importance / relevance of the strategic goals		weight		weight		General result		Restricted resources	
Proposed Projects	Goals	Score	Weighted score	Score	Weighted score	Priority	Total Score	Resource 1	Resource 2
Contribution level of the projects with strategic goals									

**Contribution scale**

0=None  
1=very small 3=small  
5=moderate  
7=big 9=very big

**Constraints**

## 5. Selected Projects


To make the selection of projects that are going to be executed, respecting the restriction of restricted resources, do as follows:

- 1) Move the priority project post-it from “Projects Catalog” column to “Selected Projects” column;
- 2) Sum the values in “Overall Score” and of each project’s restricted resource in Total row;
- 3) Then compare the total use of each restricted resource with its constraints;
- 4) If there is any restricted resource greater than the constraints, put the project’s post-it back in the “Projects Catalog” and erase the Total values;
- 5) Repeat these steps for each project, according to its priority, up to the last project, assuring that the total use of each critical resource don’t overcome the corresponding constraint.

At last calculate the percentage (%) of use of each restricted resource in comparison to the respective constraint.



This step **must be done over and over**, considering different projects selection, in order to find different projects scenario that has the possibility to be performed. For this, when analyzing project by project based on its priority, try to “skip” a project as a way to verify if other projects can be selected.

Selected Projects			
	General results	Restricted resources	
		Budget	Equip. "a"
Priority	Total Score		Planned use
4º	1,91	\$110	3d
1º	2,23	\$490	0d
2º	2,07	\$500	22d
	6,21	\$1100	25d
	 % used of constraints	96%	93%



## 5. Selected Projects

**Another possible option (scenario)**

Selected Projects			
	General results	Restricted resources	
		Budget	Equip. "a"
Priority	Total Score		
4º	1,91	\$110	3d
5º	1,80	\$200	4d
1º	2,23	\$490	0d
3º	1,99	\$350	9d
	7,93	\$1150	16d
	 % used of constraints	100%	59%



## 6<sup>th</sup> step

[illegible]



## 6. Result

For each different scenario obtained on step 5, that means, for each different set of selected projects (scenarios), calculate the global result (in %).

This global result will be correspondent to the % of maximum points that could be obtained (if all projects were to be performed).

The higher this percentage, the better is the alignment of the set of selected projects with the strategic goals and with the other criteria used on the project prioritization.

For that, calculate the percentage between the selected projects total score and the “Project Catalog” column total score.

In the example:  $(6,21/10,00) * 100 = 62\%$ .



This global result must be calculated for each set of selected projects (scenario), as it shows which composition of selected projects (portfolio) better meets the strategic goals combined with the other criteria used in the project prioritization.

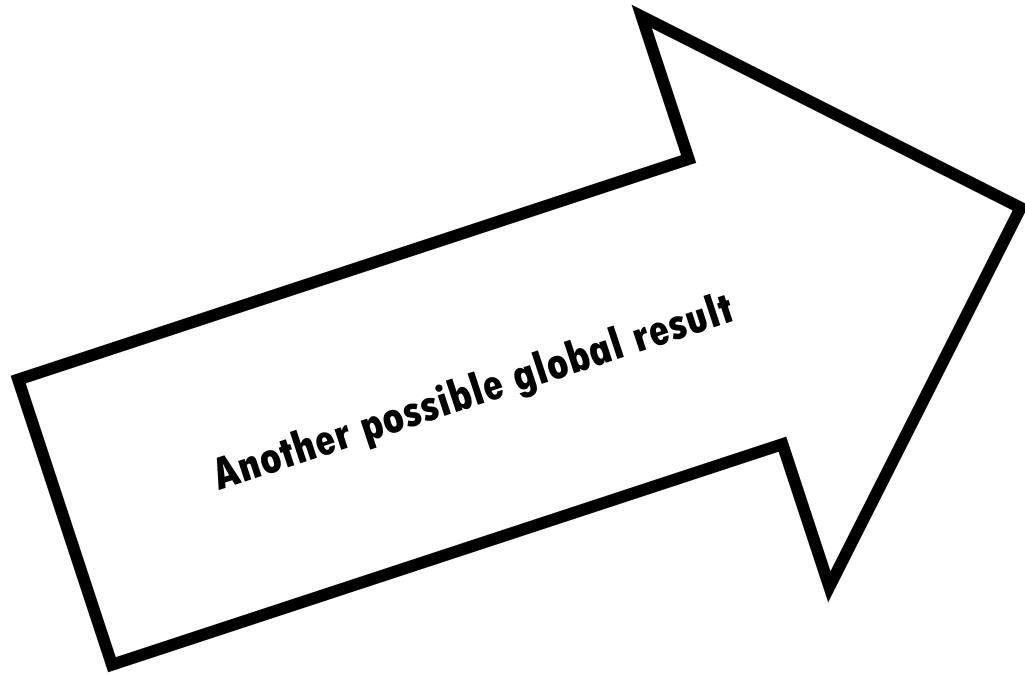
10,00	\$1650	38d	6,21	\$1100	25d
	\$1150	27d		96%	93%
Global Result (%)			62%		

Legend:



= Tip/Advice

## 6. Result

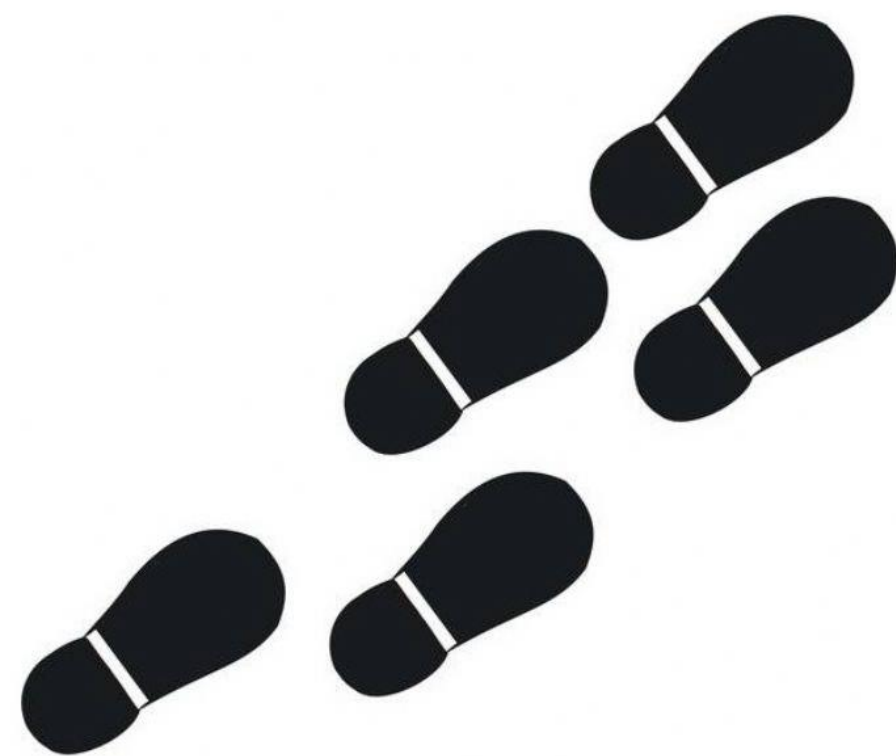


10,00	\$1650	38d		7,93	\$1150	16d
Used of Constraints	\$1150	27d		Used of Constraints	100%	59%
				Global Result (%)		
				79%		

Legend:



= Tip/Advice



**Present the different scenarios (set of projects) that can compose the project portfolio to be performed.**

**Select/decide, together with the team and other stakeholders, the scenarios (set of projects) that will compose the project portfolio.**

## Next steps



For that, use the Project Scenarios Canvas



Available to download at [www.canvasworld.com.br](http://www.canvasworld.com.br).





Where you find **PSA**Canvas, **SP**Canvas and **PS**Canvas, apart from many others canvas models for a variety of applications, such as: new business conception, project conception and planning, value proposition, among others.

Access right now at: [www.canvasworld.com.br](http://www.canvasworld.com.br).

Also at social media

