

TRG LEADERSHIP TOOL

"Practical Means for Dealing with Difficult Times"

On an ongoing basis, this section of our site will feature business tools and planning considerations designed to assist leaders for whom "just keeping up" is not good enough. These notes will focus on sequences of thought and action intended to enhance the positioning for your group, both on a long and short-term basis.

Please check back frequently to review the next tool. Visit our [LEADERSHIP TOOLS ARCHIVE](#) for previous tools.

TRG PLANNING DEVELOPMENT PRINCIPLES: PART 1

QUESTIONS AND ANSWERS

At the heart of the planning process are questions. To plan the future well, we must ask, and then be sure we have solid answers for, the right questions in the right sequence. Since the variety of questions that can be asked about any business is virtually limitless, and the answers that result may appear (or actually might be) chaotic, it is very important to start with the correct sequence of inquiry, asked of the right people.

THE THREE OVERARCHING QUESTIONS

The entire strategic planning process fits under three overarching questions:

1. What do we look like now?
2. What should we look like at a designated point in the future?
3. How will we get there?

It is important to note that the questions that are commonly asked first by results-oriented individuals tend to be:

1. What issues must we resolve, now?
2. What should we do, NOW?

However, that approach is backwards. Without answering the three overarching questions before tackling working steps, the immediate solutions flowing from these premature questions, no matter how much enthusiasm they may stimulate, is likely to be flawed. They may even perpetuate some thoroughly undesirable conditions.

WHAT A GOOD STRATEGIC PLANS SHOULD BE

A good strategic plan should meet a simple set of criteria. If a plan fails to meet one or more of those conditions, the plan should be reviewed and if necessary, adjusted accordingly.

The plan should be evaluated to ensure that it is:

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- Simple enough to be easily understood by all engaged in the effort
- Comprehensive enough in terms of targeted outcomes to be credible
- Innovative enough to anticipate shifting market needs and the likely steps of the competition
- Flexible enough to accommodate change
- Practical enough to work

WHAT A STRATEGIC PLAN IS NOT

While planning, do not lose sight of what the plan is intended to do, what it should be and what a plan is not. Having clarity as to what the plan is not will help you arrive at a plan that is realistic and achievable.

Remember that a plan is not:

- A one-time fix for all of the organization's problems
- A replacement for good business practices and day to day common sense
- An alternative to a working budget, financial plan or other operating instrument
- A substitute for ongoing leadership (but rather a leadership tool!)

THE THREE BIG RULES

There are three rules that drive the need for planning and lead eventually to the understanding that the best planning efforts are systematic, cyclical, and well documented.

Rule #1 - The Only Constant Is Change

From the moment a plan is made, a process started, or a system put in place, the conditions that led to their existence have already changed. To be effective, all planning should account for the inevitability of change and be conducted on a cyclical basis.

Rule #2 - Nothing Happens By Itself

Each outcome is influenced by, and in turn, influences a wide range of events. If you would like a result to occur, you must take action to shape the outcome.

Rule #3 - Nobody Knows What You Know

Never assume that anyone fully understands your intentions or for that matter, that you fully understand the intentions of others. Write down whatever you wish to have understood.

THE TWELVE TRAPS

All too often, limited efforts that substitute for comprehensive planning can give immediate comfort that a winning outcome is being sought correctly. Falling under any of the twelve traps listed below, or others for that matter, reduces the value of the resulting plan for your organization. Conversely, if several of the twelve keys listed below are missing, there is a chance that the result of the effort is not a true plan, but a soft intention that can give the illusion of a well targeted development process.

The traps consist of:

1. Planning the detail before the direction is set
2. Plans without owners
3. Solutions without measurable results
4. Actions without a schedule

5. Leaving intended actions out of the plan
6. Including actions that the group does not intend to pursue
7. Allowing personality to obscure the process
8. Asking, when the answer has already been decided
9. Telling, when asking is the way to assure commitment
10. Assuming that what is unspoken is understood
11. Not writing down what has been agreed
12. Not reading what has been written

THE TWELVE KEYS

A well developed strategic plan should contain twelve key items that will ultimately bring about its success or lack thereof.

The twelve keys are:

1. *An Overarching Vision*
Have a clear understanding of how the group should look in the future.
2. *Clear Ownership*
Identify individuals who accept responsibility for the success of each initiative.
3. *Measurable Results*
Determine / state a quantifiable outcome for each initiative or the path to come to one in a designated time.
4. *Working Schedule*
Establish a timetable for action, report and result.
5. *Overall Completeness*
Include either key initiatives for all Objectives or the means / ownership / timeline for developing them.
6. *Solid Practicality*
Eliminating content simply sounds good but does not lead down a clear path of positive (valuable) results.
7. *Grounded Objectivity*
Evaluate all solutions solely on their merits.
8. *Focused Direction*
State the leadership's intention for achievement over time.
9. *Broad-Based Consensus*
Confirm that what is said is what the group intends to do.
10. *Comprehensive Clarity*
Express all principles, purposes, and intended outcomes at the start in terms that can be understood by all engaged.
11. *Working Confirmation*
Capture what is being said / agreed to in writing.
12. *Active Follow-Through*
Adopt a process for monitoring and reporting both the progress of the plan and any variants.

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For additional information regarding TRG Planning Development Principles: Part 1, please visit our [Contact Page](#) and send us an Email or simply call us directly during East Coast business hours on our toll free number 1.800.97-REGIS (1.800.977.3447).