

### 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 2

##### PLANNING QUESTION

"In last year's strategic plan we used the word 'Goal' to mean values, such as 'Quality' and 'Efficiency'. I just read that a Goal should be quantifiable and have a fixed time frame. Have we used the terms correctly? What is the *right way* to use 'Objective' and 'Goal'?"

THE ANSWER IS "ALL OF THE ABOVE." The proliferation of written plans has generated a rich mix of labels. "Mission, Goal, Objective, Initiative, Tactic, Assessment," et al. serve to identify the result of the planning process, and act as checkpoints for what must happen next, but their application is at best customary.

The issue should not be the labels but the process. *Good planning provides clear answers to a group of basic questions about how you actually intend to achieve whatever ends are of importance to your group.* Those answers, which in fact are the "promises" that become the core of your plan, should be sorted out into a structure that is *readily understandable to a third party observer of your business.*

##### KEY QUESTIONS

Below are a set of basic questions followed by an array of labels (definitely not all of them) that have been used by different groups to organize their answers into ongoing plans. Notice that several of these terms show up in more than one place. *The choice of which term should be applied to which concepts in your plan and how they are organized is your decision and NOT a preset standard.*

Q. What are you actually doing? (As in "what is the nature of your business?")

A. This should be answered in the company's *Mission Statement*: Statement of Purpose, Mandate

Q. What do you intend to accomplish in the future?

A. This should be addressed in the company's *Vision Statement*: at times being called Goals, Objectives, Mission, Prospects, Targets

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Q. What are the most significant means of assuring success?

A. Through *Strategic Themes*: Major Initiatives, Key Strategies, Primary Focus

Q. What is your present circumstance?

A. Conduct a *Current Assessment* that includes: Environmental Factors, Background, Situation Analysis

Q. What are the qualities, quantities or tangible results that will indicate success?

A. *Objectives, Goals, Measure, Deliverables, Projections*

Q. What stands in the way of success?

A. *Weaknesses*: Obstacles, Issues, Problems, Liabilities, Barriers, Challenges, Competitive Environment

Q. What tools, and/or circumstances are available to help you?

A. *Strengths and Opportunities*: Resources, Assets, Internal Environment

Q. How do you intend to accomplish whatever you have set out to do?

A. Through *Strategies*: Tactics, Initiatives, Methods, Actions

Q. Who is going to see to it that the work is actually done?

A. This requires *Ownership*: Responsibilities, Oversight, Accountability, Management

Q. When is all of this supposed to be accomplished?

A. Establish a *Time frame* that includes a Schedule, Deadlines, etc.

Q. How will you ensure that the strategies will actually be undertaken?

A. Through a *Tactical and/or Operational Plan*

There are also a variety of labels for reality checks you can put in place when you start, all intended to preserve the flavor of who you are and what you intend to be along the way, among these are: *Values, Qualities, Guiding Principles, Primary Considerations*.

Always remember that your plan is unique to the needs of your group. Be certain to establish names for each function at the start of the planning process. Add a glossary to the documentation when you have finished, and be ready to be told that you have switched the meanings of Objectives and Goals.

### THE BASICS OF FACILITATED PLANNING

There is also a great deal of misconception about the facilitated planning process. One common concept (a bad one) is that in order to yield practical results, planning must be elaborate. The not terribly complicated act of identifying in an orderly fashion the purpose of an organization and the intention of the leadership rarely fails to provide functional results.

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Another bad idea is that time spent planning is time taken away from work. In fact well conducted planning increases available top management's work time by reducing time killing, circular discussions about misconceived processes as well as the impact of unanticipated adverse conditions both internal and external. Successful leaders have the experience and the judgment necessary to recognize the approach of change, once they take the time to consider their universe in an orderly sequence.

Facilitation is not a substitute for the experience and judgment of the leadership. Facilitation is a checklist and a reality check, which when used appropriately reduces the need to constantly react to surprise, misunderstanding and contention.

Finally, a very bad notion is that all good plans are complicated. In fact the opposite is the case. The best plans are based on a small group of clear understandings that are fully accepted by leaders and managers alike.

Writing a good plan should be like shooting an arrow into the wall and then drawing the target around it. Only when you can name the ideal result can you frame the path to success.

For additional information regarding TRG Planning Development Principles: Part 2, 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).