

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 3

PLANNING QUESTION

A central principle inherent in all successful planning is that the resulting plans must be **usable, understood, effective, and "owned"** by those who must carry them through to completion.

For groups which do not have formal (written) plans in place or have never been assisted in the planning process, the leadership should first agree to:

1. The purpose, structure, value, and use of planning
2. The most appropriate and efficient means of developing a plan to deal with the group's key issues
3. How to be certain that the plan reflects the reality of:
 - a. What the leadership intends
 - b. What is in the group's best interest
 - c. What the group can realistically accomplish (even if it takes a stretch)
4. How to assure that the plan will actually be followed

When all of the above points have been agreed to, the team should work together to clarify the group's current status. This can be done by identifying:

1. Issues and concerns of importance to the leadership
2. The key planning areas in need of development

Once this has been accomplished, the planning leader should propose the type of planning which is appropriate to the group and develop an outline for the planning effort which includes:

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1. Who should be involved and their role in the planning
2. How much time the planning will require
3. How the planning can be accomplished with minimum disruption
4. The nature of the result (i.e. conceptual targets, numbers, methodology) and the form of the documentation

In facilitating the planning processes, an "independent" facilitator should work with the client leadership to avoid a host of common planning errors including:

1. Plans without owners
2. Actions without a schedule
3. Solutions without measurable results
4. Planning the detail before setting the direction
5. Leaving intended actions out of the plan
6. Allowing personality to overcome process
7. Telling when asking will assure commitment
8. Asking when the answer has already been decided
9. Assuming that what is unspoken is understood

What the facilitator should not do, is present the clients with the facilitators' plan for the action the facilitator would take (this is the role of an outside expert), but rather help the group to define the actions that the group actually intends to undertake in order to achieve success.

Along the way, methods for both achieving a strategic advantage and to provide a reality check as to the effectiveness of the solutions under way should be developed.

Typical results might include:

- Clarification of the end results sought for each component product
- Specific steps as to how diverse marketing efforts can also be mutually supportive of the core lines of business
- Profile of the actual users, buyers, viewers, etc. in the targeted marketplace
- A listing of the key points most likely to appeal to the profiled groups
- The creation of key copy points for your central projects, product lines, etc. along with guidelines as to how and when to use them most effectively
- Broad marketplace enhancements, such as strategic alliances, focused public relations, key events, etc. all supported by methods connected to targeted results
- Enhanced internal processes for tracking and moving programs along

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Typical courses of action require various elements, these might include (for the development of a Marketing Plan):

- Writing specifications of existing product(s) or service(s) as initially existing
- Writing a clarification of the market, defining client (purchaser/subscriber, etc.) profile, client needs and perceptions, market histories, etc.
- Writing specification of additional corporate objectives if any (e.g. Political Positioning)
- Developing key cognitive points matching client needs to product or service features and benefits, indicating desired result
- Recommending modifications of product, services or pricing if necessary
- Writing boiler plate, slogans, etc. for each point
- Identifying cross promotion points between products
- Developing key listing / promotion strategies
- Developing matrix of delivery methods including:
 - Pricing
 - Materials
 - Sales support methods
 - Strategic alliances
 - Public relations initiatives
 - Others
- Refining marketing budget
- Establishing marketing communication and engagement calendar

A Word of Caution

There are times when embarking on a full, long range strategic effort is premature and could even be counter-productive. If that is the case a formal and carefully focused effort to identify and sort the issues confronting the group is the appropriate first step.

Immediate Purpose

To develop a clear sense of what the group as a whole:

1. Would like to achieve
2. Believes is advantageous and troubling about the current environment
3. Is willing to set as the priority of the issues to be resolved

Additionally, an opening sequence of planning activities and an initial measure of success should be established immediately.

Before you start any planning activity sequence, lay out a set of deliverables that must be achieved, these

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include:

1. An internal agreement as to the ongoing planning sequence and surrounding processes (e.g. research)
2. A listing of issues sorted into categories and ranked by priority
3. Potential measures of overall success

Similarly, at the start of every planning development sequence, the team should:

1. Define the universe of Issues / Opportunities and Prospective Outcomes
2. Develop best options for each priority area
3. State the intended results for each
4. Name the owners
5. Set the calendar for action and review
6. Specify the Measure of Progress

For additional information regarding TRG Planning Development Principles: Part 3, 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).