

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 4

THE NATURE OF THE EFFORT

Good planning provides clear answers to a set of basic questions about how you, your team and your clients can achieve those goals that are of primary importance. To be effective, your intentions should be sorted into a structure that is readily understandable to everyone who must take action to achieve the outcomes stated.

Successful plans take many forms and are used to accomplish a boundless array of purposes both large and small. We are all planning constantly. Even a mob follows a plan of sorts, even if it is poorly conceived and rapidly shifting.

A plan to deal with tough issues should be drafted by whoever is responsible for resolving the difficulty; it should be approved by whoever has authority for its enactment; it must accurately reflect both the capabilities and willingness to perform of those who are asked to carry out the resulting strategies that in turn, will at least slow, if not completely reverse, the underlying conditions that led to the need for the plan.

THE RIGHT QUESTIONS

The best planning is built on answering questions. The questions will vary according to the result desired. Some are universal and almost always need to be asked, these include:

- "What business do we actually intend to undertake?"
- "What do our clients expect of us?"
- "What are our best alternatives?"
- "When will we review the ongoing results or revisit tabled issues?"

Some questions are specific to the needs of an initiating group in dealing with their circumstance.

When dealing with adversity, these might include:

- "Who will be responsible for deciding if we need to design a new system?"

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- "How can we tell if the leadership correctly understands the degree of the challenges they now face?"
- "How can we best motivate the board, the sales force, the membership, or the administration to go beyond common measures?"

Selecting the correct questions, placing the questions in the best sequence, and assuring that the resulting answers are given to a designated set of "owners," regardless of how difficult they may appear on the surface, will facilitate a solid outcome leading to improvement.

People who work within a profession, trade, craft or discipline on a day to day basis can normally turn to the range of knowledge focused in their field as a starting point... but when adversity is the order of the day, they might find it difficult to arrive at appropriate answers that supersede self interest. Similarly, the planning team's working knowledge of the situation at hand is normally at the core of good planning, but when facing adversity, preconceived notions can interfere with common sense and at times block the way to successfully carrying out the logical results of the planning process.

AS A RESULT

Condition #1:

- Regardless of the problem at hand, all of us generally have a set of partial decisions and pre-conceived results in mind from the start. This is a part of "business as usual."

Condition #2:

- There is a good chance that some of these pre-existing inclinations, while not necessarily wrong, can be inappropriately matched to the question at hand. A good idea becomes a bad solution when we try to bend the question around an assumed answer.

A SOLUTION TO THE DILEMMA

If it is at all possible, the sequence of questions and the management of the process of answering them should be facilitated by someone whose primary concern is the planning process and not the conduct of the resulting plan. This individual should follow a set of working disciplines that include:

- Being as knowledgeable or more knowledgeable of the planning process than of the specific issues of any one situation or field in question.
- Not expected to answer the questions, define the results or carry out the plan, but rather to facilitate solid answers from a set of planners who ARE knowledgeable and engaged.

BEST OUTCOMES

The best planning is a coordinated effort between:

1. Those who set expectations
2. Those who determine the pathway to success
3. Those who will carry out the initiatives described
4. Those who ask the questions until all of the answers are known

When adversity is the order of the day, it is critical to engage a team of likely managers of the potentially resulting plan, who feel invested in creating a set of answers outside the norm, and, at best, have identified themselves through a stated commitment to cause one or more new elements to exist promptly. In doing this, the planning facilitator should create a set of deliberative conditions for the planning group that will include, but are not necessarily limited to:

A Team Effort - Presenting a path through the entire process from beginning to end.

Most groups are complex entities with many talents, ideas and viewpoints. To win the game of dealing with adversity, the planning team should start by agreeing to accept one process and then stick with it.

Terminology - Setting definitions at the start of the planning process.

The Team should agree that while there are many possible ways to use terminology, time should not be eaten debating alternative definitions, nor diverting the effort by getting lost in semantics surrounding the planning process.

Opening Terms - Initiating the effort with a set of definitive opening definitions. Together, the group should define those items that will comprise the resulting outcome of their efforts (by example):

- Strategic Plan - A set of linked promises to move from the current state to a mutually desirable outcome
- Mission - The reason that the Group exists
- Vision - How the group wishes to appear/be positioned at the end of the planning period
- Assessment - How the group, and the universe in which it resides, appears at the start
- Statement of Values - A set of central principles of operation
- Goals - The general outcomes to be pursued over the planning period
- Objectives - Measurable results that define each Goal
- Initiatives - The steps committed to achieve the Objectives
- Tactics - The broad concepts followed in setting the Initiatives
- Ownership - The identity of the individual who will track, report and be responsible for the Objectives, Initiatives and/or Tactics
- Report - The means of presenting results
- Measure - The means of quantifying and/or qualifying all outcomes

Clear Purpose - Outlining the reason for action.

Keep the end in mind and do not lose sight of the absolute end result desired from the planning process, which is to move the group forward.

Expectation of Decision - Stimulating answers that will constitute a decision.

Agree to either agree or to accept disagreement, so long as the resulting plan moves the group forward based on super-majority rule, remembering that consensus is not the same as unanimity.

Achieving Closure - Remembering that all bleeding stops.

There are infinite steps that CAN be followed, but at the end of the day the team will, in all likelihood, have done only those things which have been discussed and agreed as a target at the start.

ONGOING COMMUNICATION

Once the plan is drafted, there is still one last hurdle to jump: How to communicate the core intentions of the plan to the appropriate elements within the larger group. At times, therein may lay a last assumption to be overcome: The assumption that a good plan will automatically prevail.

To this end, make no assumptions. Assumptions are business killers.

The entire planning team must have agreed at the start to become champions of the planning result, and then act on this at the end.

REALISTIC EXPECTATIONS

We swim in a sea of information. Most group ventures include hundreds of bits of positive information... "positive" because they detail the existence of those elements that make up a project, solution or plan. At the same time, ventures are also defined by thousands of bits of negative information... that is to say, all of the elements that are not a part of the discussion, but float around it. For the purposes of moving a plan into place to deal with challenging circumstances, the choice of omissions can be as important as inclusion, breaking a potential logjam of endless debate that can prevent getting to the central issues.

Even when we can remember the thousands of elements involved in a complicated issue, it is unreasonable to expect that any of us can hold in our heads all of the combinations, both positive and negative, for every initiative every time.

The next trap is assuming that competence and memory for detail are one and the same. The more competent the professional, the less likely they are to rely on their memory of detail. The more critical the outcome, the greater the challenge to completely capture both the detail of the case, and how it was derived in order to pass that detail along to those who must engage in developing the answer/plan.

STARTING THE PROCESS

To successfully manage any planning venture, particularly when adversity is the order of the day, it is critical to develop a question sequence that is inclusive of both the issues to be resolved and the viewpoint of the stakeholders to be affected by the answers. No answers should be left to assumption. Unanswered questions are the precursors of potential holes in the communication process.

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The need to identify a planned direction with goals and objectives for the group, calls for a clear understanding of the group's circumstance at the start, which in turn often calls for asking questions of multiple voices designated by the key leadership at the beginning, opening the way to a combined commitment of those who must act in support of the resulting plan.

WHO SHOULD PLAN?

This common question should be rephrased from the get go to read: "Who should be involved in which phase of the planning effort in what way?"

Please remember: Strategic Planning is not intended to replace the ever-present need for solid leadership. When planning goes out of balance, the result can put unnecessary strain on any organization. This in itself can be a formula for chaos.

BACK TO THE BASICS OF LEADERSHIP

The ultimate decision as to who should be involved, how to proceed, and what form the answer should take, rests with the Senior Leadership of the group. The planning facilitator's role in the overarching planning effort is to make clear a path that will support the engagement of the right minds in understanding the present, and considering the future in a way that does not duplicate the leadership's mission of directing the group on an ongoing basis.

When the planning effort itself is carefully considered in advance and the sequence to be followed to a working conclusion at the end is agreed upon at the start, the resulting plan will carry the prospect of success, regardless of how tough the initiating issues.

For additional information regarding TRG Planning Development Principles: Part 4, 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).