

Six Questions to Ask About Planning

Planning is a fundamental human activity, something we do individually and something we do organizationally. It can be a powerful practice, yet many organizations stumble in creating plans, in implementing plans, or both. To offer some help with planning, we've put together this quick annual 'safety check.' Just like taking your car in to check the brakes and the tires, this guide runs a quick check of the basic functioning of your plans and planning process.

Planning

Distinct from the actual planning document (plan) that normally floats around, *planning* is the ongoing activity to produce, review, and update the organization's priorities and activities in order to achieve its mission.

It should be continuous. Planning is a verb, a process, yet we often refer to it as a noun or, more specifically, a once-a-year event. Your planning process should continue throughout the year. When was the last time you discussed the *formal* goals of the organization and the activities being conducted to achieve them? You don't have to have a huge planning session each morning, but you should have discussions on a regular basis. We recommend no less than once every quarter, but you could look at once a month or every other month, if the need is there.

It should connect to other processes. Planning is meant to be a core management process within your organization. It should work *with* other decision making activities (like budgeting or marketing), and planning should inform their discussions as much as theirs informs planning. Too often planning is done in its own conceptual 'silo' without regard to how decisions within the organization are made in other areas. Is your planning process tied to the other internal systems? Do the other internal processes actually refer to your planning priorities and assumptions when making their decisions?

It should be as easy as practicable. Always remember that planning does create work (it takes attention and time) and that a poorly conceived planning process can put an unreasonable burden on line managers and staff, who are often measured by more operational activities. Planning is meant to keep the organization adapting to a changing external environment and to help the organization focus and collaborate. Does your planning process produce meaningful information for your staff? Does it require them to do things like filling out complicated forms or extensive reporting that delivers little value or is not rewarded? The staff's participation in planning (and its documentation and reporting) should be as simple and helpful as possible for senior leadership as well as line managers.

Plans

Part of planning but also a product of it, *plans* are in the simplest sense just the formal goals you decide upon and the activities and resources you intend to devote to achieving those goals. Traditionally, the 'plan' is the document that captures these formal decisions and intentions.

Your Planning Safety Check:

Planning

- Is it continuous?
- Is it integrated?
- Is it reasonable?

Plans

- Are they customer-focused?
- Are they clear?
- Are they measured?

They should be built around the customer. This is an age-old mantra, but one that is easily forgotten in the midst of daily fires, unexpected crises, and the basic challenges involved in operating an organization. The truth is the organization exists to serve a customer need, and all of its goals and activities should ultimately be aimed at meeting that need. Do your plans place the customers first in importance? Can you trace the organization's projects and investments to providing for the specific interests of your customers? Are the needs of your customers either the first consideration or the final arbiter of conflicting internal priorities? You may do many things that don't *directly* impact these needs, but the basic priorities and thrust of your plans should be easily seen as trying to provide for what the customers need or want.

They should be clear (unambiguous). There are few things more useless than an ambiguous plan. Unmeasurable objectives, all-encompassing statements of 'strategy,' and no clear ownership or accountability make for plans that 'everyone can agree on' but few can (or will) execute. A simple reality of good plans and good planning is that it is absolutely about deciding what is a priority and what is not, with saying 'yes' to some investments and clearly saying 'no' to others. Do your organization's plans contain objectively measurable goals? Do they specify timeframes, deadlines, and even budgets for activities? Are they clear on who is responsible for activities? A test of a good plan is whether everyone involved in it has the same, clear understanding of what the priorities are, how things are being accomplished, and who is doing what.

They should be measured. Everyone who has ever read any management literature has come across the notion that "what gets measured gets done." Not only should objectives be time-bound and measurable, the entire plan itself should be monitored to ensure that activities are getting done, that people are focused on the priorities, and that the plans themselves stay aligned with changes inside and outside the organization. If everyone knows that no one 'watches' the plan, then they're likely to ignore it. Are the goals in your plan measured? Is the plan itself routinely reviewed with progress updated? Is the organization made aware of everyone's progress against the plan? This of course brings us back to our first item in this safety check: planning should be continuous. In the end, plans have to be used to be useful, and of course they have to be useful to get used.

There are many more questions we could ask, but we believe that these six items go a long way toward ensuring that your organization has a meaningful and effective planning process that maintains focused and achievable plans.

About Vision Foresight Strategy

We are a Honolulu-based futures planning and strategy firm that works with organizations to anticipate strategic change and to craft the strategies that will shape their desired futures.

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