



***“IDEAS INTO
ACTION”***



The Safe Choice

***“If you don’t
know where
you are going ...***

***... then any road
will do.”***

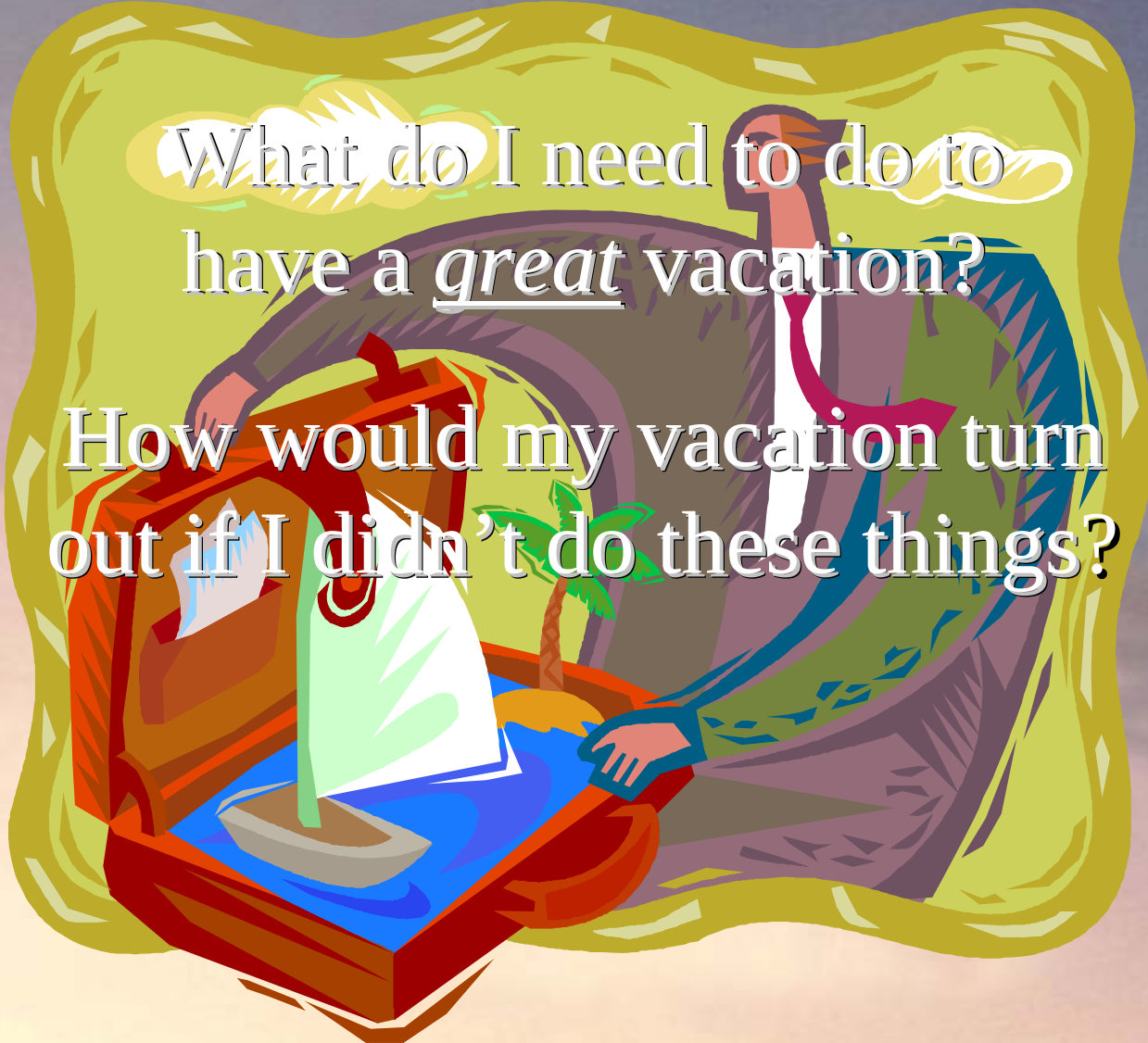


**Cheshire Cat to Alice
“Alice Through The Looking Glass”**

An Example

What do I need to do to
have a great vacation?

How would my vacation turn
out if I didn't do these things?



Another Example

What do I need to do to build a house?

How would my house turn out
if I didn't do these things?



Our “Agenda”

Critical Success Factors:

- Determine Priorities
- Steps for Effective Planning
- ✓ • Set “S.M.A.R.T.” Goals
- Simplified Planning Tools
- “Fail-Safe” the Plan
- Effectively Delegate
- Follow-up

Follow-Up

Follow-Up



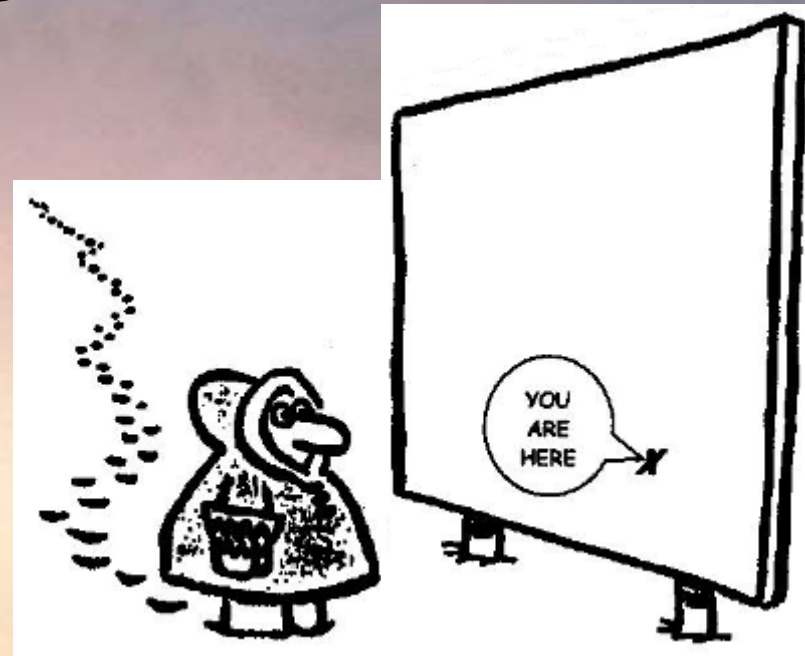
What Is Planning?

- The **design** of a hoped-for future
AND
- The **development** of effective
steps for bringing it about

*"The journey of a thousand miles
begins with a single step."*

-- Lao Tzu

6th Century Chinese Philosopher





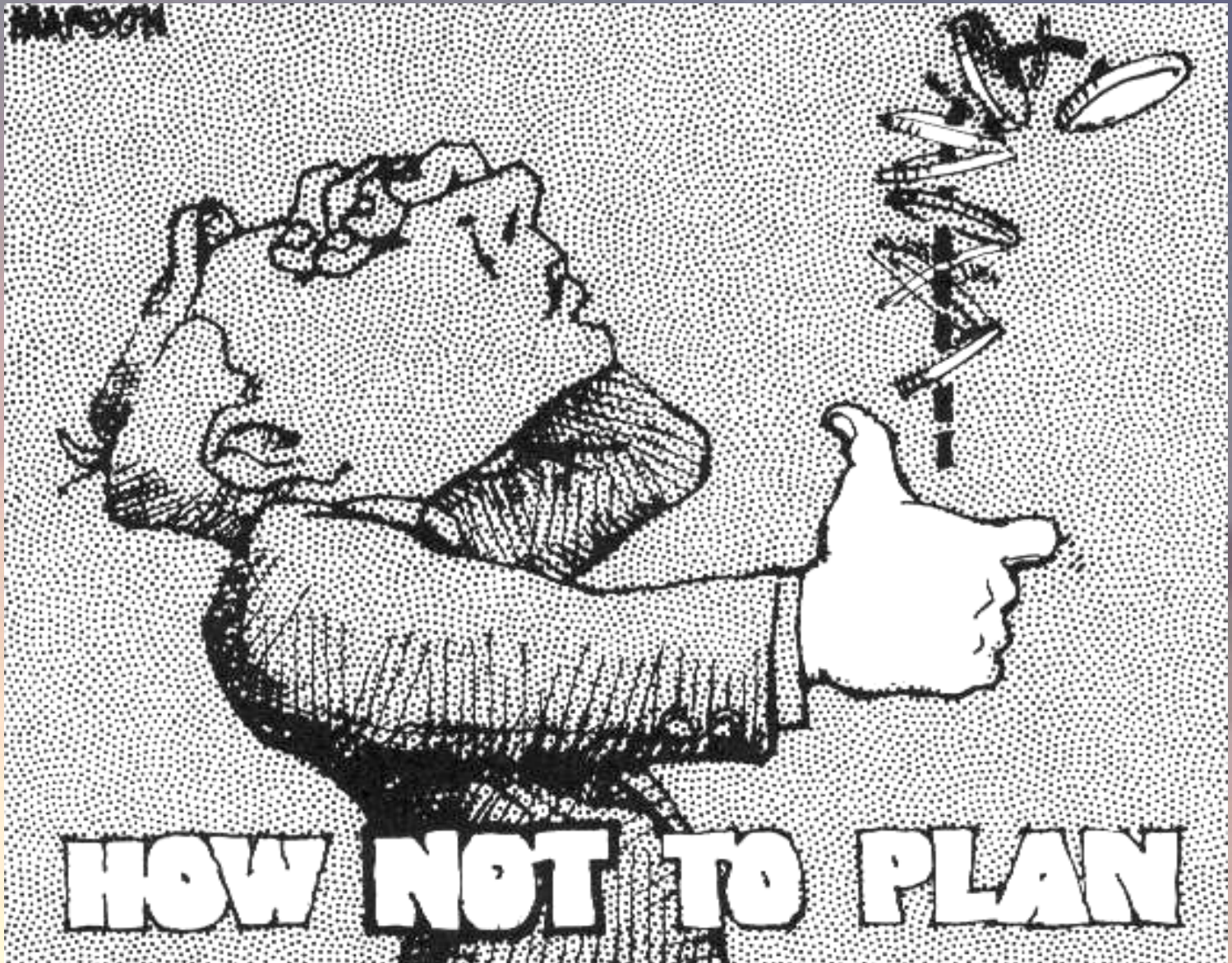
What is Planning?

–Why Clarify Expectations?

- The critical factor leading to poor performance is unclear expectations
- The root cause of conflict is unclear expectations



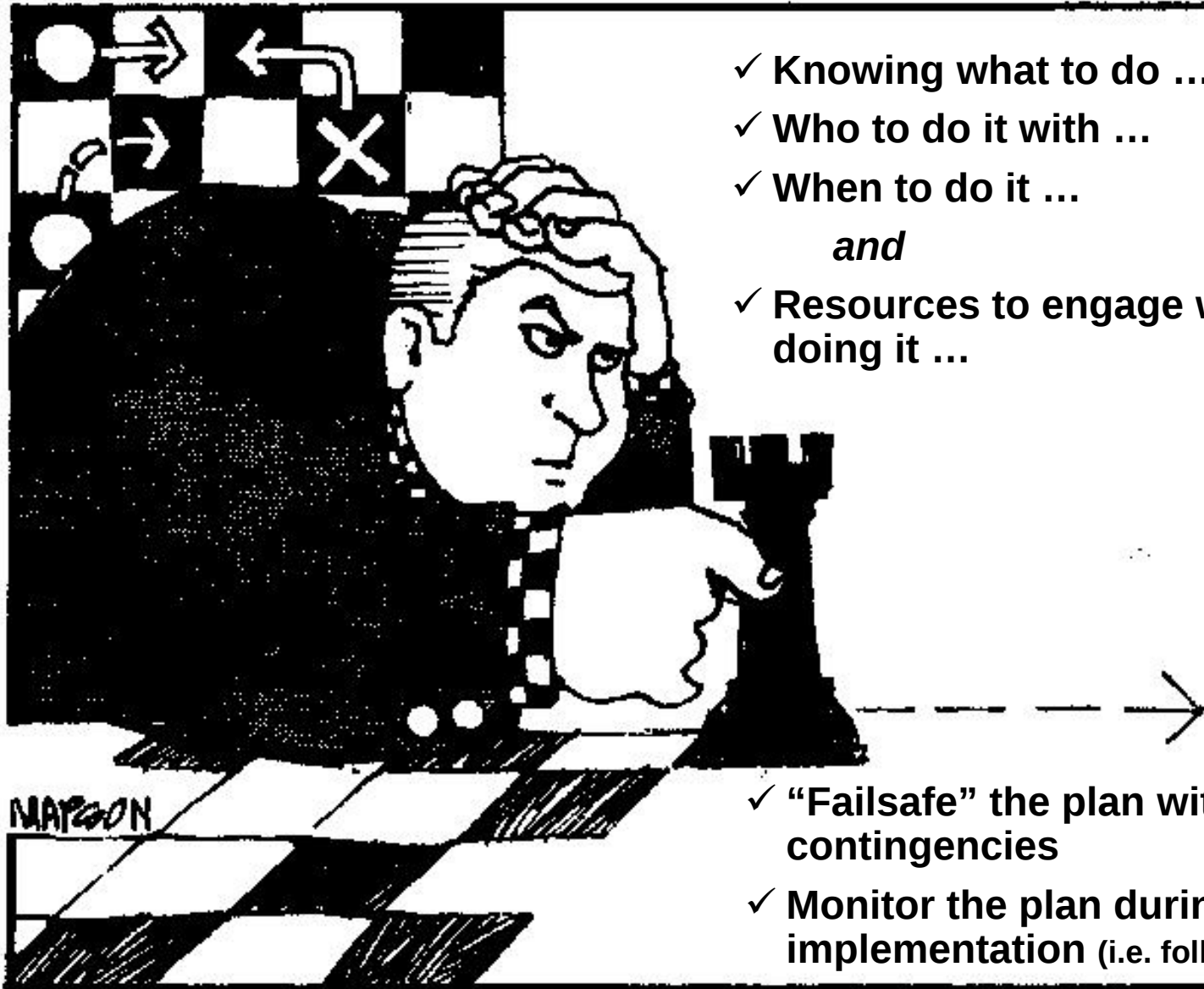
What Planning Is NOT!



Why People Don't Plan?

- Don't believe in it to begin with
- Perception that it takes too much time
- Perception that it is too complicated/complex
- Like “crisis-management”
- Love the “rush” of being over-stressed
- Afraid to try (*fear of failure / fear of success*)
- Never had the need
- Never learned how

What is Planning, *Really*!



- ✓ Knowing what to do ...
- ✓ Who to do it with ...
- ✓ When to do it ...
- and*
- ✓ Resources to engage while doing it ...

- ✓ “Failsafe” the plan with contingencies
- ✓ Monitor the plan during implementation (i.e. follow-up)

OVERVIEW OF THE ACTION PLANNING PROCESS



Action Planning STEPS

1. WRITE a “S.M.A.R.T.” OBJECTIVE

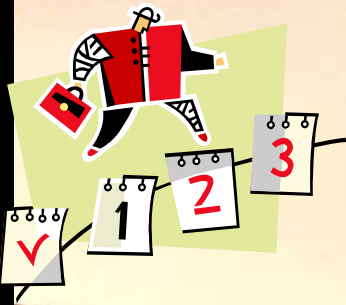
Brainstorm

2. List ACTION STEPS

3. SEQUENCE the action steps

4. Answer two critical planning questions:

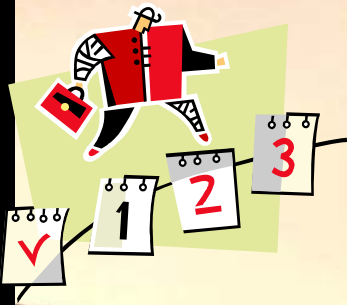
- WHO? [“Right Fit” for task]
- WHEN? [Deadline proposed]



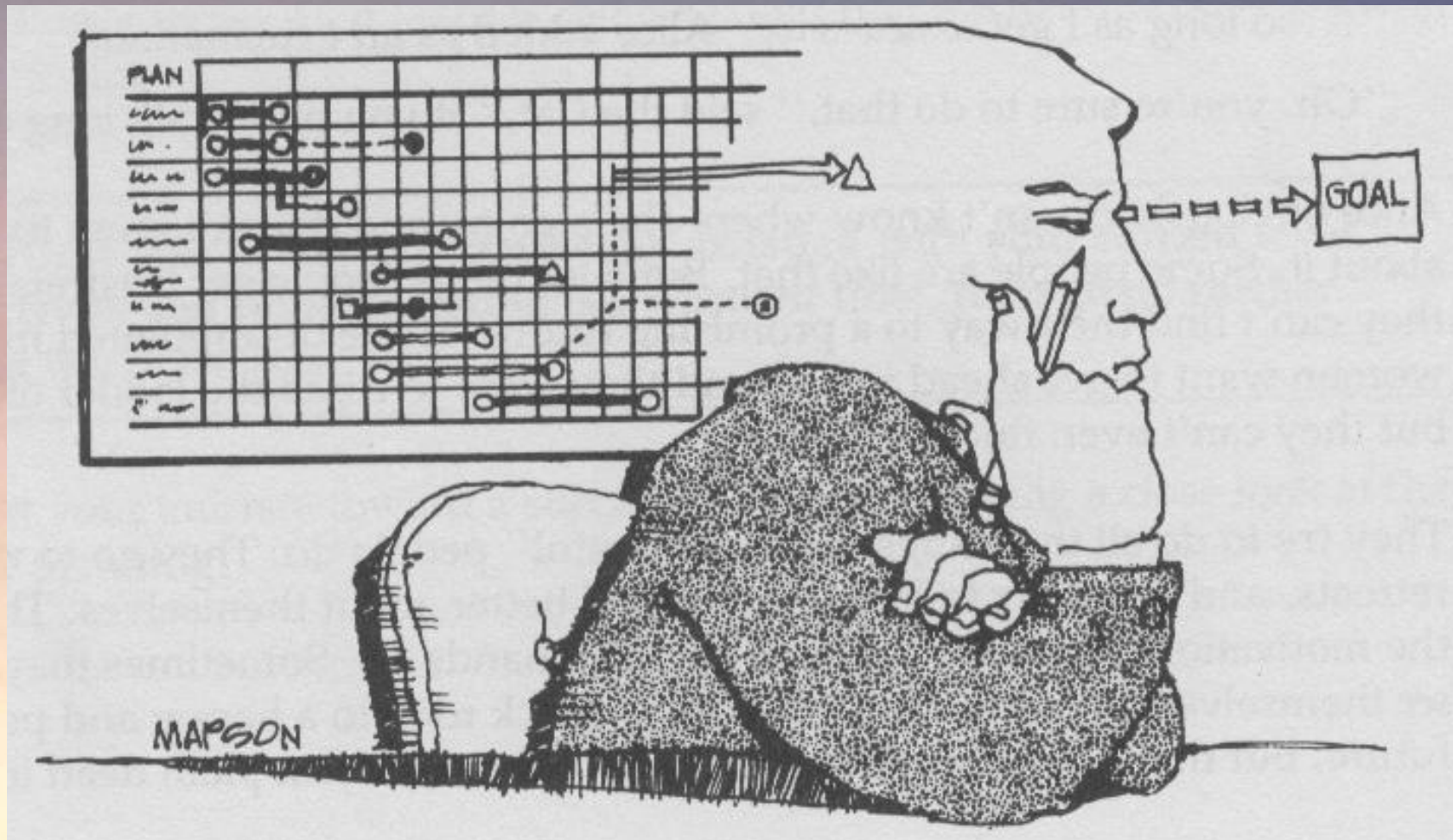
Action Planning STEPS

5. Identify & Assess RISKS
6. “FAILSAFE” with contingency planning
7. Create a MASTER plan
8. Determine BENCHMARKS and/or MILESTONES
 - *Benchmarks* = Activity-based outcome projections (e.g., “landmarks”)
 - *Milestones* = Time-based progress projections (e.g., “distance”)

*“Plan your work
work you plan !”*
-- Ancient wisdom



First Things First: Goals!



Step 1: *GOAL SETTING*

Setting “S.M.A.R.T” goals ...

- **S** = Specific
- **M** = Measurable
- **A** = Achievable
- **R** = Relevant
- **T** = Time-Based

Leads to “S.M.A.R.T.” Solutions



Step 1: **GOAL SETTING**

Written Goals Pay Off !

- Compared to 83% of American workforce who have no specific or written goals:
 - Specific – but unwritten – goals can create up to **3x's** the productivity and profit
 - Specific AND written goals can create up to **10x's** the productivity and profit

Step 1: **GOAL SETTING**

YOUR TURN ! !

- Briefly work through the set of questions on Participant Guide pages 12 & 13.
- You may work with a partner on a single objective

“**Incentive \$\$ Prize**” for three “lucky” participants if they can create a truly “S.M.A.R.T.” objective

Time Limit – 3 minutes



Step 1: **GOAL SETTING**

YOUR TURN ! ! *(continued)*

- Three volunteers.
- Read us your “S.M.A.R.T.” Objective
- If anyone else can make it
“S.M.A.R.T.”-er then they get the
“incentive prize”



Step 1: **GOAL SETTING**

- Share what you have recorded as your “S.M.A.R.T.” goal on page 13 with a partner
- Solicit feedback about your goal regarding the “S.M.A.R.T.” criteria.
- Revise the Goal so it becomes “S.M.A.R.T.”

Step 1: *GOAL SETTING*



How important is “MEASURABLE??”

HOW DO YOU EAT AN ELEPHANT?

EXECUTIVE MANAGEMENT
Effective Action Planning

COLLEGE

How do you eat an elephant??

Your facilitator will give you instructions for how to use this page




1 2 7 38 56 14

25 55 20 50 44

31 43 49 19 13 8 32 26 2

15 21 33 52 22 14 10

61 21 33 52 22 14 10

39 3 16 34 40

45 57 46 28

23 53 11 18 54 6

41 29 47 59 30 42 36

5 35 17 12 24 60



The Safe Choice

HOW DO YOU EAT AN ELEPHANT?

**EXECUTIVE
MANAGEMENT**
Effective Action Planning

Lexus COLLEGE



One bite at a time ...

Your facilitator will give you instructions for how to use this page

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The Safe Choice

HOW DO YOU EAT AN ELEPHANT?

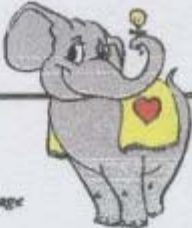


EXECUTIVE
MANAGEMENT

Effective Action Planning



LEXUS COLLEGE



But be sure to chew ...

Your facilitator will give you instructions for how to use this page

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HOW DO YOU EAT AN ELEPHANT?



**EXECUTIVE
MANAGEMENT**
Effective Action Planning



LEXUS COLLEGE



... before you swallow!!

Your facilitator will give you instructions for how to use this page

① 37 7 25 55 31 43 49 19 13	38 56 14 20 50 44 8 32 26 2
15 21 33 51 27 9 3 45 57	52 22 4 10 16 34 58 40 46 28
23 53 11 41 29 47 59 5 35 17	18 54 6 30 42 48 36 12 24 60



Step 2: “Brainstorm” Action Steps

Take a long view – start at the destination (*aka: “S.M.A.R.T.” objective*) and work backwards.

Brainstorm to yourself as if you were writing an instruction manual about to achieve your desired outcome ...

EXAMPLE:

- I’d have to make sure that “X” (*action*) was done ...
- And, then somebody would have to do “Y” (*action*) ...
- I’d have to locate “A” (*action*) ...
- Oh, yeah, and “B” has to be set up (*action*) ...
- In order to have “Z” ready to install (*action*) ...
- So that “C” can be used properly (*action*) ...
- Etc., etc., etc.



Step 2: “Brainstorm” Action Steps

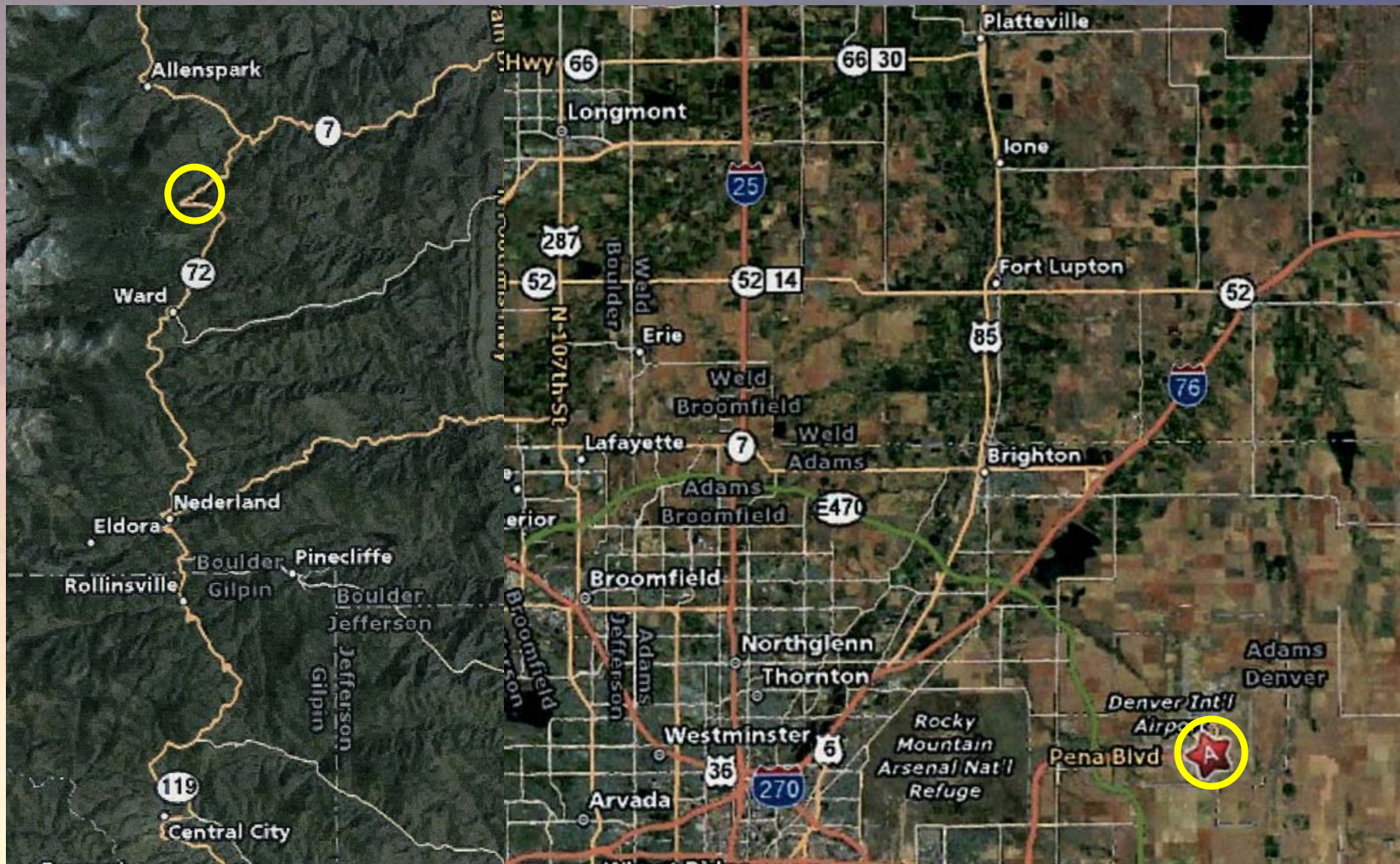
- Identify all the action steps that will must be taken to reach the goal
- Don’t worry what order they go in at this point
- Just “brainstorm” all the points ... sequencing the steps will come next



Step 2: “Brainstorm” Action Steps



Step 2: “Brainstorm” Action Steps

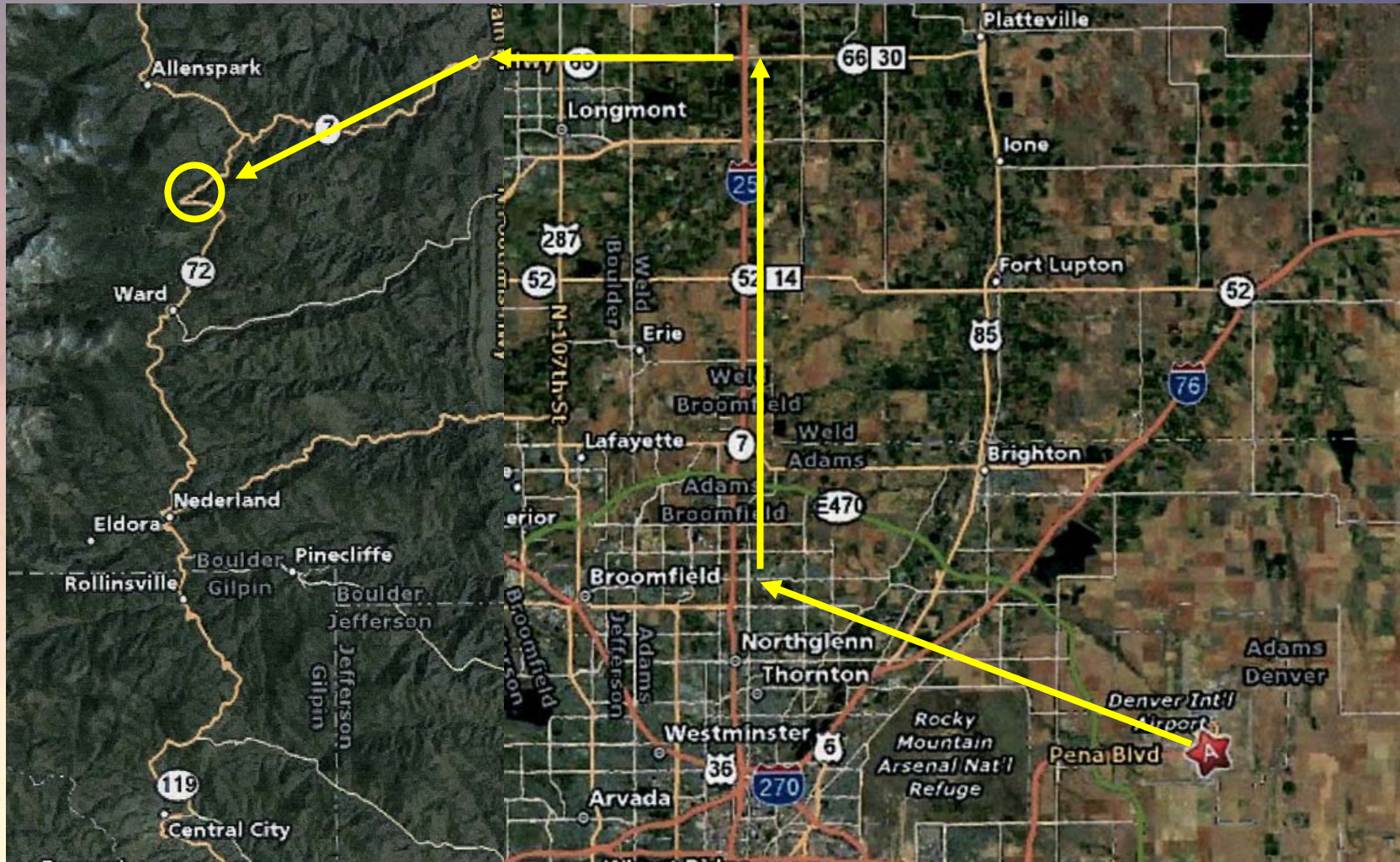


Step 3: Sequence Action Steps

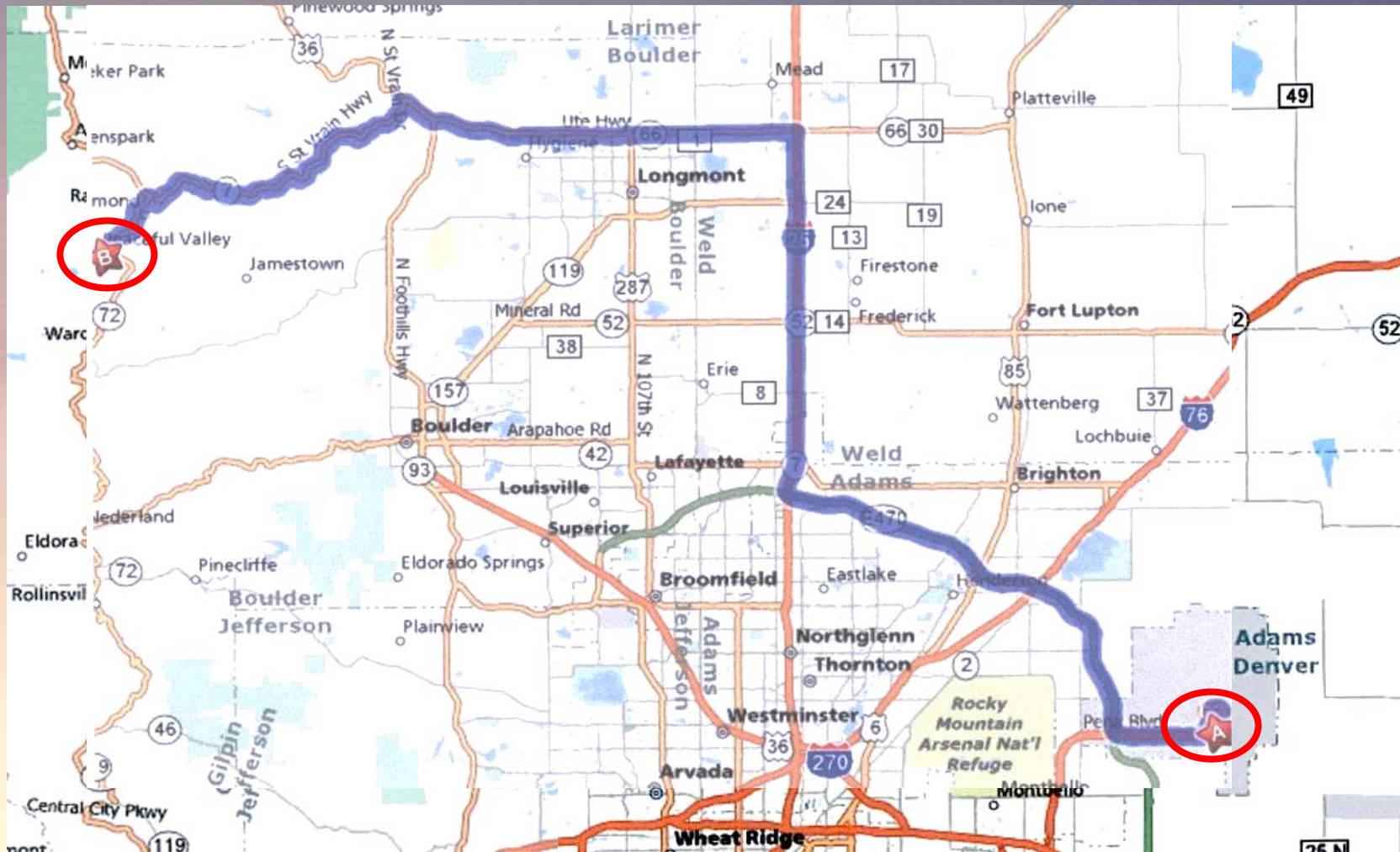
- Take the “brainstormed” set of action steps and **SEQUENCE** in a logical order
- Some steps can be done simultaneously – sequence these in order of importance (*i.e., impact*)



Step 3: Sequence Action Steps



Step 3: Sequence Action Steps





The Safe Choice

"Action Steps"



MAPQUEST.

A: Denver International Airport (DEN): 8500 Pena Blvd, Denver, CO 80249

	1: Start out going NORTH on PENA BLVD.	0.2 mi
	2: Turn SLIGHT RIGHT toward TERMINAL EAST.	2.1 mi
	3: Stay STRAIGHT to go onto PENA BLVD.	3.5 mi
	4: Take the E-470 TOLLWAY N exit, EXIT 6B, toward BOULDER/FORT COLLINS.	0.9 mi
	5: Merge onto E 470 N (Portions toll).	17.5 mi
	6: Merge onto I-25 N/US-87 N via EXIT 47 toward FT COLLINS.	15.6 mi
	7: Take the CO-66 exit, EXIT 243, toward LYONS.	0.3 mi
	8: Turn LEFT onto CO-66/CR-30. Continue to follow CO-66 W.	15.7 mi
	9: Turn LEFT onto MAIN ST/CO-7 N/US-36 W/CO-66 W.	0.2 mi
	10: Turn SLIGHT LEFT onto 5TH AVE/US-36/CO-66/CO-7. Continue to follow CO-7.	14.3 mi
	11: Turn LEFT onto CO-72/PEAK TO PEAK HWY.	3.3 mi
	12: Turn LEFT onto PEACEFUL VALLEY RD.	0.3 mi
	13: End at 475 Peaceful Valley Rd Lyons, CO 80540-8951	

Estimated Time: 1 hour 24 minutes

Estimated Distance: 73.87 miles

B: 475 Peaceful Valley Rd, Lyons, CO 80540-8951

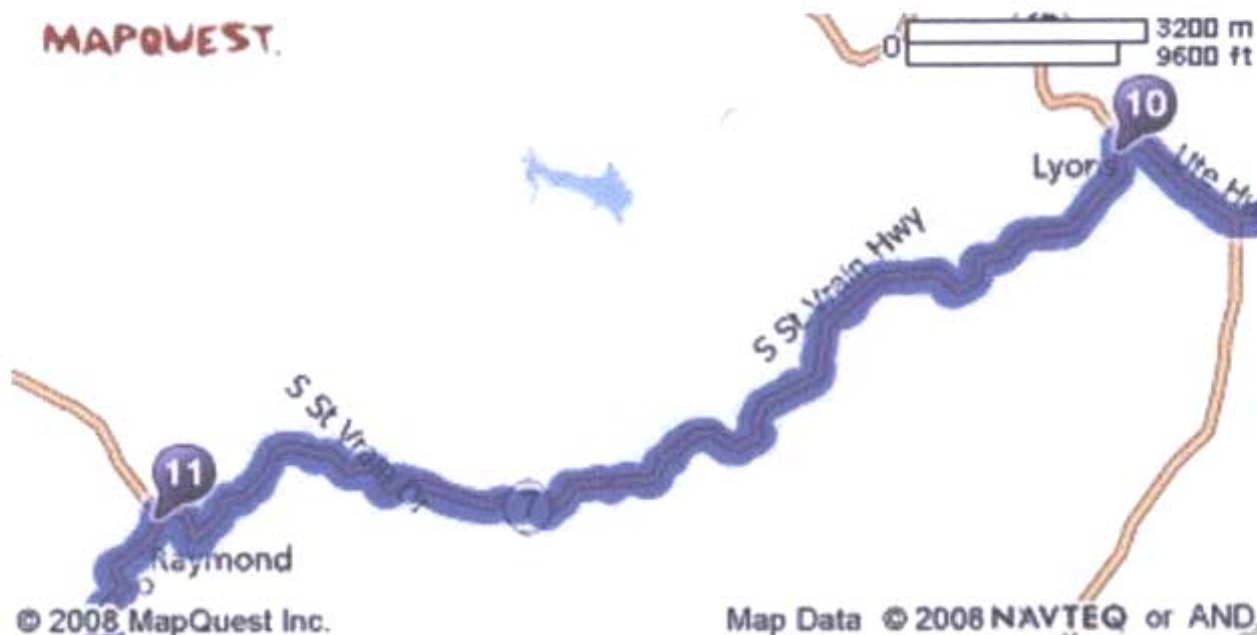
Total Time: 1 hour 24 minutes

Total Distance: 73.87 miles



10: Turn SLIGHT LEFT onto 5TH AVE/US-36/CO-66/CO-7. Continue to follow CO-7.

MAPQUEST.



11: Turn LEFT onto CO-72/PEAK TO PEAK HWY.



Step 4: How Steps Will Be Completed

- Identify the best person to delegate each action step to

Note: The “*HOW*” of each step will be the responsibility of the person you delegated the respective action step to.

Great opportunity for “coachable moments.”

- Identify target completion date/time
- Begin thinking about “benchmarks” and/or “milestones” as monitors for progress during implementation



The Safe Choice

Example:

"Action Steps"

"Benchmarks"

"Milestones"

MAPQUEST.

International Airport (DEN): 8500 Pena Blvd, Denver, CO 80249

START

1: Start out going NORTH on PENA BLVD.

0.2 mi

2: Turn SLIGHT RIGHT toward TERMINAL EAST.

3.5 mi

3: Stay STRAIGHT to go onto PENA BLVD.

0.9 mi

4: Take the E-470 TOLLWAY N exit, EXIT 6B, toward BOULDER/FORT COLLINS.

1.5 mi

5: Merge onto E 470 N (Portions toll).

15.6 mi

6: Merge onto I-25 N/US-87 N via EXIT 47 toward FT COLLINS.

0.3 mi

7: Take the CO-66 exit, EXIT 243, toward LYONS.

15.7 mi

8: Turn LEFT onto CO-66/CR-30. Continue to follow CO-66 W.

0.2 mi

9: Turn LEFT onto MAIN ST/CO-7 N/US-36 W/CO-66 W.

14.3 mi

10: Turn SLIGHT LEFT onto 5TH AVE/US-36/CO-66/CO-7. Continue to follow CO-7.

3.3 mi

11: Turn LEFT onto CO-72/PEAK TO PEAK HWY.

0.3 mi

12: Turn LEFT onto PEACEFUL VALLEY RD.

0.3 mi

END

13: End at 475 Peaceful Valley Rd Lyons, CO 80540-8951

Estimated Time: 1 hour 24 minutes

Estimated Distance: 73.87 miles

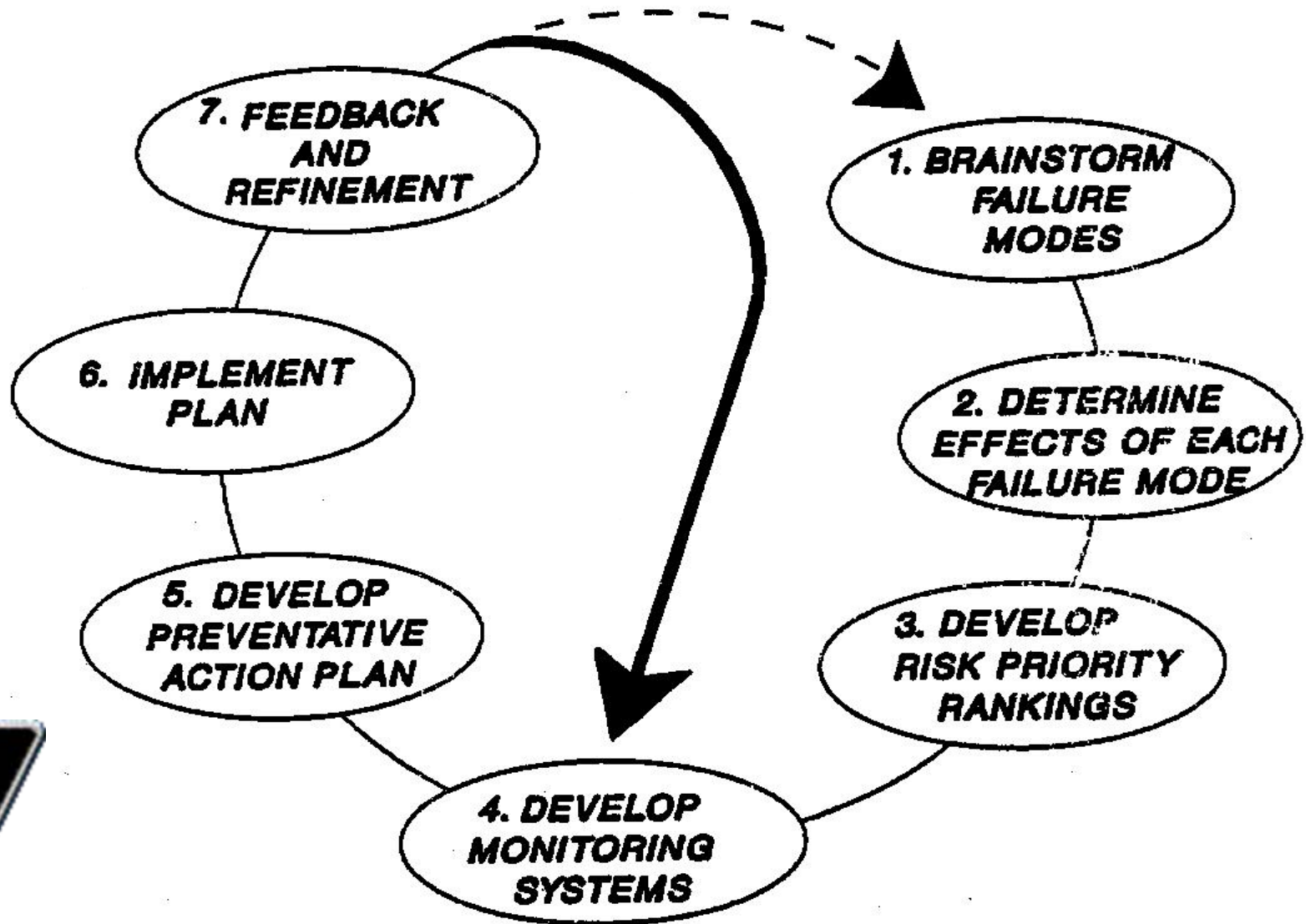
B: 475 Peaceful Valley Rd, Lyons, CO 80540-8951

Total Time: 1 hour 24 minutes

Total Distance: 73.87 miles



Step 5: **MANAGING RISK**





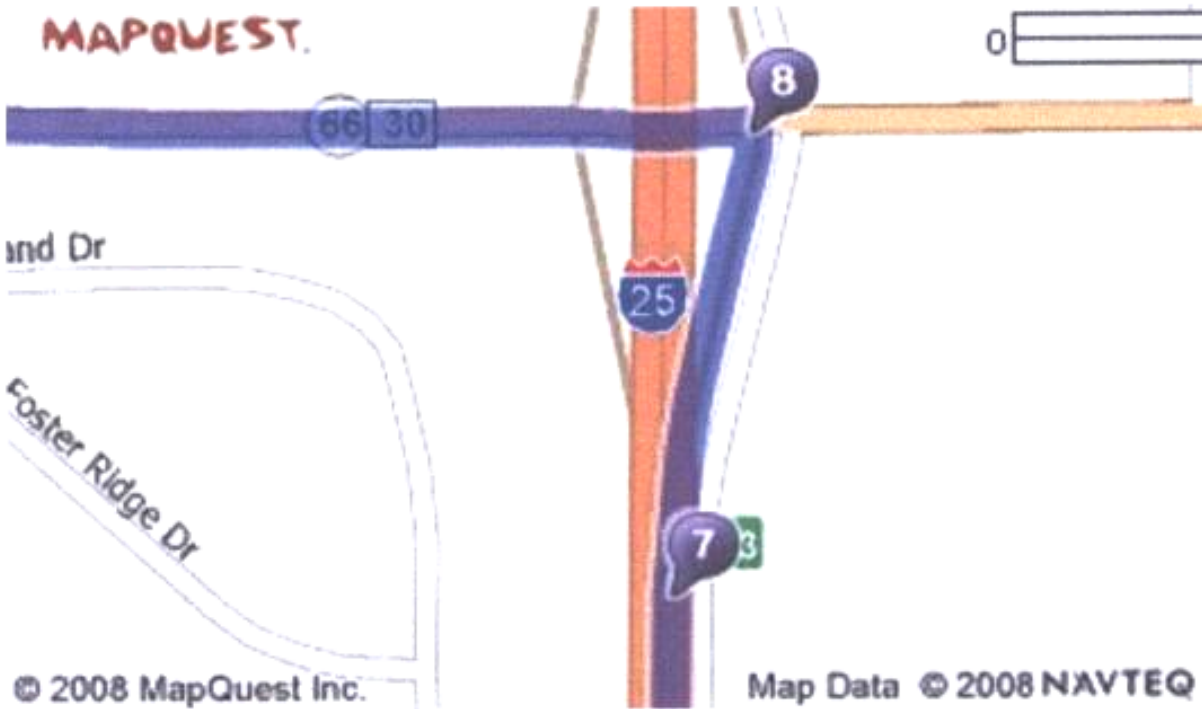
The Safe Choice

B



7: Take the CO-66 exit, EXIT 243, toward LYONS.

MAPQUEST.



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Map Data © 2008 NAVTEQ



8: Turn LEFT onto CO-66/CR-30. Continue to follow CO-66 W.

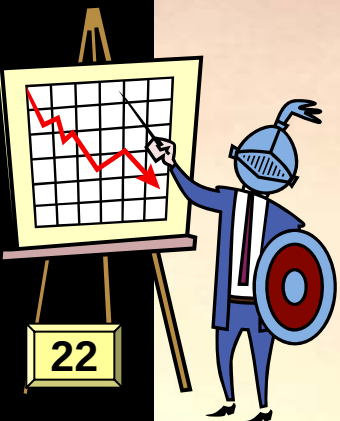


A

Step 6: ***FAILSAFE with CONTINGENCIES***

SMALL GROUP DEMONSTRATION *(continued)*

- For any risk item with a high “Risk Priority” Score revise the original Action Plan in ways that prevent the risk altogether.
- For any risk item with a moderate “Risk Priority Score” brainstorm 2 or 3 contingency *(optional)* actions that can be implemented quickly should the risk actually occur.



Step 7: *Create the MASTER PLAN*

The final, MASTER PLAN can now be:

- Created (*and incorporating the contingency planning to reduce risk*)
- Communicated to associates
- **DELEGATION** Delegated to specific stakeholders who will help accomplish the outcomes toward which the plan is targeted



Step 7: Create the **MASTER PLAN**

- Note the 8-step **DELEGATION** process model on page 23.
- Much of this process can be simultaneously done with the *Action Planning* process
- Also note the checklist of ways to be more effective when you delegate (*page 24*)



Step 8: *Determine MILESTONES*

*In **collaboration** with those to whom action steps have been delegated:*

- Determine “HOW” each action step will be accomplished
- Agree to **timelines** for each action step to be completed – these become the “milestones” by which progress can be measured
- Record the more noteworthy “milestones” on the Master Plan worksheet document.



FOLLOW-UP

INDIVIDUAL ACTIVITY

- From your own experience with projects and delegated assignments:
 - Identify one or two things that usually do **NOT** work as a form of follow-up
 - Identify one or two “**BEST PRACTICES**” for follow-up that really contributed to successful outcomes of a project or delegated assignment

Time Limit – 2 minutes



FOLLOW-UP

SMALL GROUP DISCUSSION

- Share what you have recorded on page 25 with your discussion group
- Create a “master list” of “What **DOES** work”
- Select a scribe who will report-out the “master list” to the combined assembly

Time Limit – 5 minutes



What Questions Might You Have?

Thank You!