



PLANNING

Dear Friend,

Wise Advice

One of the wisest men in my life was my father-in-law. He rarely left a conversation without imparting some snippet of useful advice. Now, I will tell you that some of his nuggets left you shaking your head with a wry "Did he really just say that?" smile. But, more often than not, what he shared carried a deep and lasting message.

Perhaps it was due to his military background, but a favorite topic for Dad was *planning*.

Let the slightest level of disorder be visible in an organization, event, or a person's approach, and oh my goodness. You were bound to hear him comment that those involved were "about as organized as a soup sandwich". (*Pause for a minute; there's a great visual in that one!*)

Dad also loved young people. He'd talk, and talk, and talk as long as they'd listen. But, he'd also engage. He'd probe into their lives today and their plans for the future. Invariably, he'd ask if these great ideas were written anywhere. To the poor, unsuspecting one whose answer was "No", he'd quickly encourage: "Put it on paper. If it's not in writing, it's not a plan; it's just a dream." Then, each time he'd see them thereafter, he'd check progress in the specific areas mentioned in earlier meetings. And, believe me, you got an earful if he inquired about your planning and learned that there still had been no pen put to paper.

I smile in memory. There's much to what Dad had to say, especially about organization and planning. In fact, his wise advice is as fitting now as ever. So, join me for this month's edition of **EA Insights** as we continue our look at planning as an individual, team, or organization. Trust me; it really is easy to be more organized than a soup sandwich. Together, let's think through how you can make it happen!

All the best,

June

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Plan Well to Do Well

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Let's continue our conversation about making personal or organizational progress. Last month we explored why it's important to [Examine the Past to Excel in the Future](#). This month's topic is *planning*.

A fun part of my work is meeting with organization execs, planning teams, or even with individuals in order to think strategically about the future. Okay, honestly, *they* don't always share my joy...initially anyway. Just as many people have stopped making New Year's resolutions, many also are reluctant to plan more broadly. The reason? Far too often planning goes NOWHERE! So, the rationale is that, if nothing's going to come of it, why waste the effort? Now, some will go through a planning exercise because a board, or higher ups, or funders, or someone else expects it; however, the effort often is half-hearted at best. (*Sound familiar?*)

Ah, but, thinking strategically and planning need not be an exercise in futility. And, that's where the fun comes in for me in these engagements. I get to assist people in seeing that those who plan effectively typically will find themselves making more headway toward meeting their goals than those who avoid planning or do it haphazardly. It really is true: *Plan well to do well*.

Here's the \$64,000 question, though: *What does it mean to "plan well"?*

Planning well means thinking strategically about what must be done.

People tend to be great at brainstorming. Whether in a group or alone, there's usually no loss when it comes to generating ideas. The difference between simply brainstorming and thinking strategically,

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"Quotes"

"It is ... a good time for the League, which is nearly at the end of a comprehensive strategic planning project that will identify new visions and directions for the organization."

~Jed Bernstein

"We just want to be successful with our execution."

~Duke Crews

"We are in an exciting time because we are in the transition phase from planning and design to actually having it on the ground."

~Lou Duggan

"We will have the resources to do what we need to do. We are committed to investing in [this]."

~Karen Finney

"Ideas are easy. It's the execution of ideas that really separates the sheep from the goats."

~Sue Grafton

"Strategic planning for the future is the most hopeful indication of our increasing social intelligence."

~William Hastie

"Planning is bringing the future into the present so that you can do something about it now."

~Alan Lakein

"Whether you are just entering the workforce or nearing retirement age, planning for the future is critical."

~Ron Lewis

"Strategic planning will help you fully uncover your available options, set priorities for them, and define the methods to achieve them."

~Robert McKain

"Organizing is what you do before you do"

however, is seen in the "So what?" of the ideas that are generated.

Planning well, first, involves reconnecting to personal or organizational mission. "Why is it that I am/we are here?" "What's the mission?" "What are my/our immediate needs?" You see, effective planning doesn't occur in a vacuum; it's intricately connected to the *why*. "If X is why we're here, then what must be done in the next period (this year, quarter, month, or whatever) to get us closer to X?" This line of thinking doesn't exclude consideration of nice-to-do items or initiatives, but it does change their priority. It allows you to identify and focus on what's going to be most critical in advancing your direction and to determine how to take on other efforts as time and resources permit.

Planning well means developing solid goals.

While the mention of SMART goals generates eye rolling among some, I'm a believer! The better crafted your goals, the better able you are to carry them out. So, take the time, and think them through. Make your goals:

-- **Specific:** Mushy goals are useless. Ensure that each goal clearly states the outcome you are intending to achieve.

-- **Measurable:** Identify, in terms that are as tangible as possible, what success looks like. By doing so, you, and anyone else involved, can evaluate whether the goal was met, exceeded, or missed (and by how much).

-- **Achievable:** Since childhood we're encouraged to shoot for the stars, but a lot of us walk away frustrated because we've positioned ourselves for failure by setting unrealistic expectations. Every goal should be one that actually is possible to accomplish. Yes, it's healthy to stretch, but avoid setting goals that are beyond conceivable reach.

-- **Relevant:** Some SMART versions list the "R" as "Realistic", but that seems redundant of the "A" to me. Instead, I think in terms of *relevance*. "Does this proposed goal really make a difference in the grand scheme of things?" "Does it link back, and really help me/us get closer to, the overall mission or some part of an immediate need?" If connection to what matters is missing, why take it on?

-- **Time-Based:** This is a key problem with many goals. They're just hanging out there with no targets in terms of when they'll be accomplished. And, you know what happens with goals that lack time frames to drive them; they get put on the back burner, and many times, are simply forgotten. So much for making things happen....

Planning well means devoting sufficient resources to execution.

Strategic planning undertakings sometimes fall short because of an imbalance in the effort. Here's what I mean. It's not uncommon for a person or a team to go whole hog -- devote time, energy, and resources -- into *developing* a plan. The resulting document looks great and exhibits tight strategy. And, that's wonderful! There's just one glitch. The effort associated with *executing* that primo plan often is lacking. There are few or no resources allocated to get things done. The result...a fizzle.

Planning well entails not just putting together the ideas about what you want to accomplish. It also involves mapping out, and assuring the availability of, the resources necessary for plan implementation. Sometimes there will need to be an adjustment of some sort in the new plan in order to align ideas with existing resources. Other times, current initiatives will have to bend because of a resource shift required for the execution of critical new plans. The point is that planning apart from a realistic assessment of resources puts into jeopardy all that you wish to accomplish.

Planning well means setting aside appropriate time for progress measurement.

There's an old saying: "*What gets measured gets done.*" How true.

Planning well means that you're not just thinking about what you *want* to do; you're also developing an approach for how and when, throughout the activity period, you'll pause to measure progress and make adjustment to what you're *actually* doing. This is quite different from many planning efforts that fail to assess results until the 11th hour or the actual due date. Frankly, then it's often too late. Time, effort, resources, opportunities, momentum, good will, etc. may all be lost by that point. In other instances, people plod away at goals that were set, and that made sense at the time, but that somehow became less crucial along the way. Yet, they're still on the schedule, and they're still gobbling up resources...perhaps at the expense of something more pressing.

Development of a schedule for periodic progress check-ins, and then actually conducting those honest assessments along the way, contributes to the success of the work. This ensures that the planning effort is able to measure real-time progress and that it's flexible and nimble enough to account for real-time modifications that may become necessary.

To accomplish much, plan well. And, we invite you to let **Executive Advantage** partner with you. We're here to help you chart a well-developed course for your future, and we're here to assist you with ongoing progress assessment and execution monitoring. Take the first step. [Contact us today.](#)



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At **Executive Advantage**, we are committed to providing results-based business and management consulting, leadership development, and coaching support. We partner with business leaders to build healthy, well-functioning organizations, where goals are met and people thrive. We also partner with individuals to create professional (and personal) lives with clearer direction, improved results, and greater balance.

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something, so that when you do it, it is not all mixed up."

~A.A. Milne

"[T]he delights of solitude don't only consist of dreaming. Next in enjoyment, I think, comes planning."

~Anna Neagle

"Our results demonstrate solid progress[.] I am pleased ... with the foundation we've built over the last 19 months."

~Bill Owens

"They really didn't put the time into planning what's best. They rushed into a project that really required a lot of thought and a lot of planning."

~Jon Preiksas

"[He] questioned how ... you allocate scarce resources without goals and objectives[.]"

~Terry Roberts

"Success is steady progress toward one's personal goals"

~Jim Rohn

"I was pleased overall with the execution. We have things to clean up (but) I thought all that was pretty good."

~Ron Turner

"Planning is thinking beforehand how something is to be made or done, and mixing imagination with the product[.]"

~Paul Williams

*"[W]e had to change our planning to accommodate the new dates. *** This happened within enough time so that people could adjust plans for the new dates."*

~John Wood