

Exponential Consulting Leadership Topic

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Planning and Prioritizing

By Stephen Billing

In preparing for battle I have always found that plans are useless but planning is indispensable – Dwight D. Eisenhower.

Planning has long been seen as one of the essential components of management. Being able to set objectives and goals, scope out the length and difficulty of tasks and anticipate problems before they occur are the hallmarks of a good planner.

There are many things that managers must plan for. These include:

- Annual plans.
- Budgets.
- Projects.
- Rosters.
- Daily work and regular activities.
- Performance management.
- Communicating decisions and other important information.

Planning as Development and its Use as a Performance Management Tool

Planning is very useful not only so that you yourself know what to do, but also for making sure that others also know what to do. In my career as a manager of teams in organisations, and as a project manager, I have found it very useful to ask those reporting to me to tell me what their plan is for tackling difficult or large tasks or situations. If they haven't already thought it through, this question ("What's your plan?") prompts them to do so and we arrange a date when we will meet again so that they can take me through the plan. When they take me through their plan, I get to understand how they are thinking about the situation and I get a sense of any risks or things that they might not have thought of. Through this process I also find out the skill level of the team members, because if they don't have all the skills required for the task, this becomes apparent through gaps in their planning.

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When we are happy with the plan, then I agree the check in points with the person. I usually ask them to suggest when we should check in. This means that the monitoring is agreed early on and this helps me to avoid pestering them to get progress reports and gives me an agreement to refer back to if they do not report as agreed. In this way, I have found planning to be very helpful in managing the performance of my team members.

How to Put Together a Plan for a Project

I usually approach project planning in several steps. First, I identify all the activities that need to happen. I like to do this with as many of the other people who are involved as I can, either in a group, or else one on one if there are parts of the project that affect only an individual. At this stage I don't worry much about the order of the activities, but just try to identify what the activities are. Brainstorming techniques can be helpful – nowadays I mostly use a mind map if I'm doing it myself or with just one other person. If I'm doing planning with a group then I use a white board for the mind map, or I might do a list on the white board. Another technique I use with a group is to have a pile of yellow stickies and get members of the group to write activities down, one per yellow stickie. This has the great advantage of making it easy to rearrange the activities in the right order which is the second step of the process I often use.

The second step is to put the activities in order, identifying milestones along the way. I usually do this by asking "What comes first? What is next?" This gives a sequential list, which is what you want. At this stage you can also think about what things can be done at the same time. For example, you might be able to interview people and do background reading on the project during the same two week period, but you might not be able to draft the report until you have completed the interviews. I think of milestones as significant achievements along the way, where there will be an output produced. For example, having a report with recommendations signed off by a steering group or senior manager is often an important milestone in a project. Identifying the milestones is helpful because the achievement of the milestones is one way of measuring progress on the project.

The third step is to work out how long things will take given the resource that you have available. There are two ways that you can do this and I use both. The first is good when you have to estimate how long the whole project will take. You start with the first activity and go through each of them in turn, estimating the amount of time each of the activities will take (e.g. one day, one week, two weeks). Again, consider what things can be done at the same time and what has to be done sequentially.

The alternative way of doing it is useful when you know at the start that you have a deadline and you have to work out how you will meet it. In this case, you start with the deadline for the project and work backwards from there. For example, if a report has to be approved by the steering

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group on 30 June, then you might have to distribute the report to them on the 23 June.

A gantt chart is useful for putting these activities in order and showing how long things will take.

Risks and Issues

It is also worth considering risks and issues when you are planning, particularly when planning a project. Risks are problems that might arise but have not arisen yet. Issues are problems that have actually arisen and have to be dealt with. Think of risks in terms of their likelihood (i.e. probability that it will occur) and impact (i.e. how serious it would be.) Then you can work out how to reduce the likelihood and mitigate the seriousness of the risk.

Prioritising

Those who are most effective seem to have a knack of making sure they do the important things, even when there is chaos all around. I look at my week ahead, usually on the weekend, and think about what it is that is important to do during that week. Note I said important. Things that are important are those that will have the most impact on achieving results. I think about my work, but also my family, physical exercise and my writing. You might also have other categories that are important to you.

The importance of things then, is related to their impact on getting you what you want – they rejuvenate you, make you feel good, get results in your work, give benefits to your family and so on. Coaching and developing staff is one of these important activities for any manager. On the other hand, things that are urgent are related to having to be done by a deadline, and may or may not be important. If you want to be an effective manager you must make sure that you spend enough time on the important as well as on the urgent.

It is good to think about what time of the day you are most productive. For some people it is in the morning, for some afternoon and for others evening. Personally, I am a late owl and do lots of my best work in the evening. Unfortunately it's not that social! But you have to find a rhythm that works for you and create opportunities to do what is important.

To Do Lists

Do you have a "To Do List" crammed with things to do that fills up as fast as you tick things off and never seems to get any shorter? "

If so, consider thinking of your "To Do List" as an "Ideas" list – things that you might do. Then, schedule into your diary only those things that you are going to do, as appointments. For example, I have appointments scheduled with myself when I work on developing my business, and writing. While I might change these appointments, they are in that diary as appointments. Until I did this I wasn't making much progress on my book – it was just sitting on my To Do List making me feel guilty but not helping me to get the book written.

Summary

To summarise, planning and prioritizing are important ingredients in being a successful manager. Planning means thinking about what needs to be done and what might go wrong. Planning is a useful process for making sure you yourself know what you need to do, for communicating it to others and for managing performance. The good news is that you can always improve how well you plan.

While planning is important, the execution of your plan is paramount – it is the proof of the pudding. You must be able to set your priorities so that the important takes precedence over that which is merely urgent. It is not that you run out of time to do things, e.g. watch your child's football match, but that those things were not high enough priorities. Do everything you can to make sure that your diary contains the things that are important to you, including the things that are in your plans, so that you can be far more effective in getting the things done that will get you the best results.