

Planning Lessons from the Trenches

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Session Objectives

- Share planning experiences & "discoveries" from public, government, academic and corporate experiences
- Examine aspects of planning process
- Balance honesty with diplomacy!

- Rebecca = corporate
- Yvonne = public
- Lynne = academic
- Marjorie = government

Basic 3 Phase Planning Cycle

Planning Process: Clarity from the beginning

Planning Process: Communication is the Critical Connector

Planning Process: With the true end in sight...

The Process Applied in Corporate Settings

- Plan today to implement tomorrow (really – *tomorrow* – as in the *next day*)
- Drives home the importance of:
 - Current client input & conversations
 - Stakeholder connections
 - Balancing the urgent with the critical
- Often the process is completed in a few days

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Lessons from the Corporate Trenches*

DO:

- Take a pressure cooker view
- Assign planning to "working group"
- Gain senior & team buy-in to the approach, "strawman" & timeline
- Develop, gain approval for decision criteria for selecting strategies or objectives
 - Example.ppt
- Discuss macro issues in working group
- Work micro issues in breakout or "sub-groups"

DON'T:

- Involve too many people in the working group
- Try to do this in your office or without a neutral facilitator
 - "off-site" facilities & ground rules (that are adhered to) are critical
- Keep going without regular check-ins to management & those not directly involved
- Forget to use the decision criteria
- Sweat the small stuff or the fine print

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