

Making plans

- What do you want to accomplish in your job in the next year?

- What do you want to accomplish this week?

- How do your plans for this week fit into your plans for the next year?

The **BS2** session *Using your time wisely* emphasises the importance of planning. Planning helps you prepare properly for the tasks you have to perform. It also helps you to decide on your priorities, which tasks need to be performed first. It also helps you to identify what really needs to be done, and when. Planning helps you to budget your time so that you make the best use of it and complete the tasks that need to be completed. It also explains how you can use tools like calendars, to-do lists, schedules and tickler files to manage your time and your tasks effectively.

In this session you will learn more about planning. In particular, you will learn about the link between goals and plans, and between the organisation's, the team's and your own personal goals and plans. The **BS2** session *Setting SMART goals* explains how longer term goals (or objectives) can be supported by intermediate goals (or targets). In this session you will learn how to use plans to make sure that you achieve your intermediate goals and your longer term goals.

Organisational goals and plans

Goals are what you want to achieve. Plans are how you expect to achieve them. In small organisations, goals and plans are often no more than thoughts in the head of the owner. As organisations get larger these goals and the plans for achieving them have to be shared so that at least the managers know what they are trying to achieve. The best organisations try to ensure that their goals and plans are known throughout the organisation, at least in outline.

Organisational goals take many forms. A lot of organisations have mission statements. They are designed to give an organisation a sense of purpose. They say 'this is the way we are heading'. The best ones are really useful, giving everyone in the organisation (and its suppliers and customers) a real sense of where the organisation is heading. Mission statements are sometimes called an organisation's aims, because they say *where* it is heading. They may also be linked to its **values**. These say what the people who work for the organisation should regard as *important*.

Case Study

The Internet search company Google has seen its name become the verb for searching on the Internet - 'to google'. Google's mission is 'to organize the world's information and make it universally accessible and useful.' It lists ten values in its corporate philosophy:

1. Focus on the user and all else will follow.
2. It's best to do one thing really, really well.
3. Fast is better than slow.
4. Democracy on the web works.
5. You don't need to be at your desk to need an answer.
6. You can make money without doing evil.
7. There's always more information out there.
8. The need for information crosses all borders.
9. You can be serious without a suit.
10. Great just isn't good enough.

Finally, it proudly boasts that its informal corporate motto is 'Don't be evil'. Unfortunately, when it set up a Chinese version of Google (www.google.cn) it censored it by not including sites that the Chinese government disapproved of. Many people said that that was clearly 'being evil'.

If you worked for Google and you believed in its mission and its philosophy, and agreed with that informal motto, how would you feel about its decision to accept Chinese censorship? Organisations that set demanding goals and values make life harder for themselves than those with lesser goals and values. They may be clear to their employees, their suppliers and their customers, but they also make it easier for people to say 'you've failed'.

Aligning goals

Missions and values say what an organisation is generally about, but in order to plan activities there need to be more specific goals. Many organisations have **strategic plans** which say what they want to achieve (their strategic objectives) and how they want to achieve them (their strategy). It is called strategy because it attempts to cover all the main aspects of what the organisation wants to do, including investment in new buildings and equipment, changes to its staffing, products or services, the markets it operates in. This will usually cover several years. They are very long term goals

From this strategic plan, an organisation will usually develop a **business plan** that says what it is aiming to achieve for the next two or three years (its business objectives) and how it hopes to achieve them. These are its long term goals. In larger organisations there may well be similar goals and plans for divisions or departments, sometimes called **operational plans**. These are medium term goals. It is these goals and plans that your team will be most closely involved in, as they determine your team's goals and tasks. These will tend to be short term goals. However, you may also have goals for the whole year which would be the team's long term goals. In ideal world the team's goals help the division's goals be achieved, and these in turn contribute towards achieving the organisation's goals.

The labels long term, medium term and short term don't refer to specific time periods. They mean different things to different people. Long term for an oil company (which will plan 20 or more years ahead) isn't the same as long term for a new Internet business, which may not have thought more than a year or so ahead at most. In the same way, your team will mainly plan for the next few days, so a couple of months ahead is medium term and six months is long term. This is because your plans are about detailed tasks which may easily change. Starting up a new factory or office involve thinking years ahead.

Case Study

Jonah works as a team leader in the call centre of a major mobile 'phone company. The company has decided to expand into landlines (ordinary home 'phones) and to offer broadband (fast Internet) connections for free. To get it, customers have to sign up for three year combined mobile and landline contract.

Jonah's manager has told all the team leaders that their teams will be expanded and that they must spend the next few weeks training their teams, especially the new members. Their teams will each be set targets for signing up customers; those that achieve them will get significant bonuses. The team leaders will all be going on training programmes over the next four weeks. In the meantime, a major recruitment drive is just starting. Once they are trained they will start training their teams and then the new members as they arrive.

She gives them all their personal training programmes and asks them to start thinking about training up their teams - it will take two half-days. She needs them to check planned holiday times so that they make sure all team members are trained. If necessary, they can swap people for training with another team. She wants action plans from them all.

Why plan?

In Jonah's company, the strategy to move into landlines and broadband involves a major investment in equipment, marketing, training and new staff. To make it all work, the goals of the company, the division he works for and his team (their new performance targets) must all be aligned. If the team's don't hit their targets, the division won't hit its business goals and the company's strategy may fail.

To make sure that the goals are achieved, the organisation needs to create plans. They have planned to recruit new staff. They have planned to train their team leaders. Now the team leaders have to plan to train their teams. All these plans should fit together in the same way that the goals fit together.

Plans make people think about what has to be done, what resources (equipment, people, etc) are needed and the timescales involved. It helps everyone involved to know what is expected of them. It also helps prepare a budget, the flows of money into and out of the organisation. Without a plan, it would be very difficult to achieve the goals that have been set.

What is an 'action plan'?

An action plan is one kind of plan. It is called an action plan simply because it focuses solely on what action is needed by the team leaders, and doesn't include things like purchasing equipment or recruiting staff. These would appear in the business plan. An action plan usually contains a statement of:

- ❖ What is to be done (in the form of a number of actions or tasks)
- ❖ How, where and when it will be done (what resources are needed, location and timing)
- ❖ Who will be involved, and their role

It is useful to head up an action plan with a statement of the goal for which it has been prepared. In Jonah's case that would be something like:

'Train all existing and new team members in preparation for the new landline and broadband services.'

Jonah's action plan appears on page 6. This shows how Jonah intends to go about training his team. A useful way to create an action plan is to think about all the things you need to do to achieve your goal. Write these down on Post-it™ notes or pieces of paper. Sort them into the order in which they have to be done. Then write notes on each one with the *'how, where and when'*. In the process you may find that you have missed out an action or got the order wrong. You can move them about and add in extra items easily. If a task looks quite large and involves several elements, break it down into smaller actions. When you are confident that you have covered everything and got them in the right order, you should put them on your action plan.

You will see that Jonah's action plan has a column headed 'Action completed'. This can be ticked or, better still, dated, when the action has been completed. If the date is past the target date in your plan you should review all the other dates. You may need to change them and alert other people affected. This kind of change is sometimes called **slippage**. It can happen when unexpected events occur or actions take longer than expected. If you find that your action plans always slip then you should think about being more realistic in your timings.

Jonah's action plan

Goal:	<i>'Train all existing and new team members in preparation for the new headline and broadband services.'</i>						
	Action	When	Where	Resources/ materials	People	Action completed	
	Check team holiday plans for August/September	12th July	Team board	Holiday planner chart	--	✓	
	Discuss swapping team members for training with other team leaders	14th July	TL meeting	Training plan/ Holiday chart	TLs		
	Draw up training schedule and book facilities	18th July	Office	Training room	Training Centre - Jan Stewart		
	Complete own training	7th - 11th August	Marlborough Hotel, Swindon	--	Training Centre		
	Undertake first half-day's training	TBA	Training room	Training room/ training pack	Team members		
	Undertake second half-day's training	TBA	Training room	Training room/ training pack	Team members		

Using an action plan

Action plans are a simple but effective tool that all good team leaders should use. They help you to take control over your tasks and achieve your goals. You can use them for planning your work tasks, and also for planning your personal development activities. It encourages you to think in advance about what you are doing, how you will do it (including what resources you need, and when and where you will do it) and whose help or support is needed. It also gets you to think about how long things might take and what may need to be done first to ensure that you achieve your goals.

If you want to use an action plan you can draw one up yourself. However, there is a blank action plan on page 8 which you can use or adapt.

If you find it useful to draw up action plans, then you should encourage your team members to do the same. If everyone has their own action plan, then they each know what they are expected to do.

Action plan

Goal:	Action	When	Where	Resources/ materials	People	Action completed

Comprehension Check

Complete the following exercises. Refer back to the session if necessary.

A. List two differences between a strategic plan and an action plan.

1. _____
2. _____

B. Answer the questions. Circle the letter in front of the answer.

1. Which of the following is not a correct statement about goals?
 - a. Long-term goals must be done within a month.
 - b. Both long-term goals and short-term goals involve planning.
 - c. Short-term goals contribute to achieving long-term goals.

2. Which of the following is not a short-term goal?
 - a. completing a package by six o'clock
 - b. making a certain number of sales calls by the end of the week
 - c. completing a one year training course

3. Why are short-term plans often easier to fulfil than long-term plans?
 - a. Short-term plans are less likely to be affected by unforeseen events than long-term plans.
 - b. Short-term plans involve wants and needs in major areas of our lives.
 - c. Short-term plans are more fun.

4. Which of these is not usually included in an action plan?
 - a. The resources needed.
 - b. The timing of actions.
 - c. The budget allocated for actions.

Making Connections

Answer the questions following each case.

Case A

Raehka and Peter want to start their own small removal company. Their long-term plan is to start by moving furniture for homeowners and eventually start a division for businesses. However, before Peter and Raehka can do this, they must set up their business and find some customers. What might be some of Raehka and Peter's short-term plans?

Case B

Allison has just started running the fruit and vegetable department for a new mini-market. She will have to help recruit some assistants to help her. Her long-term goal is to build the shop's fruit and vegetable department into the best in the area. She feels that accomplishing the following goals will lead to her overall goal. Decide whether each goal is a short-term or long-term goal. Write *short* or *long* next to each goal.

- ❖ Make sure that the fruit and vegetables are fresher than the ones anywhere else in town. _____
- ❖ Unload boxes of fruit and vegetables that arrive each day. _____
- ❖ Offer a wide variety of fruit and vegetables. _____
- ❖ Build a network of suppliers with good prices and excellent products. _____
- ❖ Arrange fruit and vegetables in the fruit and vegetable bins. _____
- ❖ Clean the fruit and vegetable display. _____

Think and Apply

How well do you use the skills in this session?

- ❖ Do you know what your organisation’s mission statement and values are?
- ❖ Do you know what the business goals are for the organisation or your division?
- ❖ Do you use action plans (or something like them) to plan your work tasks?

1. Read the list of skills. Tick the boxes to show your strengths and weaknesses.				
<i>Skills</i>	<i>strengths <- - - -> weaknesses</i>			
	I'm good at this	I'm quite good at this	I'm not so good at this	I'm quite poor at this
■ recognising the goals and values of the organisation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
■ setting goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
■ planning your actions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
■ using plans to help you achieve your goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Do you want to improve any of these skills?				
3. How do you plan to improve the skills you listed in question 2? (You might want to discuss this with your line manager or your tutor/mentor/coach.)				