



TriMetrix®HD Planning and Organizing

Planning and Organizing

Utilizing logical, systematic and orderly procedures to meet objectives.

Why is this skill important?

People who are good at Planning and Organizing are able to effectively see into the future, forecast needs and comprehend how certain situations or procedures will meet those needs. They are able to systematically and logically evaluate the components of a situation and then utilize them effectively to produce the desired result. If you have developed your Planning and Organizing skills, you will be able to evaluate and allocate human and material resources to effectively accomplish a goal or plan.

In contrast, people who aren't as good at Planning and Organizing may be too oriented in the now, and they may spend more time solving current problems and attaining immediate results than planning for their future successes. They may have difficulty in identifying the separate, relevant components of a situation. They will be greatly hindered in reaching goals because they will have difficulty in deciding what steps to take in order to reach their goals.

Planning and Organizing isn't just about being organized so that you can find files and paperwork on your desk, although that is essential. Rather, Planning and Organizing is also about what you do with the information in a broader sense. How do you find what you need and then use it to effectively perform the required activities?

Recent research shows that people who were a little bit paranoid, such as those people who anticipate what they would do if they were robbed, if their house caught on fire or if they were caught in some other catastrophic event, were much more likely to survive the event because they had mentally prepared themselves for it.

What are skills associated with Planning and Organizing?

Someone who has mastered skills associated with Planning and Organizing:

- Works effectively within established time frames and priorities.
- Utilizes logical, practical and efficient approaches.
- Prioritizes tasks for optimum productivity.
- Develops procedures, processes and systems for order, accuracy, efficiency and productivity.
- Anticipates probable effects, outcomes and risks.
- Develops contingency plans to minimize waste, error and risk.
- Allocates, adjusts and manages resources according to priorities.
- Monitors implementation of plans and makes adjustments as needed.

How do you develop your own skills in Futuristic Thinking?

- Don't procrastinate! Procrastination is the art of keeping up with yesterday while putting off tomorrow. Make organization a key part of each day. Make time for priorities and keep yourself organized every day.
- Carefully develop strategies to reach your goals. Good strategies can save you time, money and energy.
- List the component parts or things that you must do or have in order to do your job correctly. For example, initiate contact with a customer, submit weekly reports on Mondays, file purchase orders daily, etc. If you can, break down your job into a listing of at least 10 tasks or components that must be completed daily, weekly, monthly and less often.
- Use one good calendar tool, whether it is a paper planner, a handheld computer or software on your desktop computer. Use this one calendar for all your activities, both professional and personal. Avoid multiple calendars for every activity you are involved in, as that is a prime way of over-scheduling and confusing yourself.
- Keep a single to-do list where you won't lose it and refer to it easily. Categorize things as daily, weekly or monthly items. Use your planner pages, write your action items on a white board in your office or whatever method works. Update this list weekly or more often if needed.
- Make time for planning, even when time is of the essence. Most likely, the time you spend carefully creating a plan will save you time in completing the project.
- Prioritize your daily, weekly and monthly to-do lists. The most urgent items must be your first priority. If someone or something interrupts your progress, assess the new task to determine its level of urgency.

- Remember the 80/20 rule; You can be 80 percent effective by achieving only 20 percent of your goals, but this only applies if you prioritize and accomplish your most critical 20 percent each day.
- Before you even begin acting on a new project, create a timeline for each segment of the project and schedule weekly to-do items throughout the timeline to avoid a crisis. Scheduling as many components early on is the surest way to meet all timelines, and it will help you and others who are working on the project stay organized.
- Make sure your specific goals are realistic and achievable with resources you currently have.
- Explore alternative strategies and consequences to help you develop the best plans.
- Establish targeted completion dates for projects and phases of projects.
- Build some leeway into your plans. You will be glad you did if higher priority projects interrupt your progress. If they don't, you'll be done early!
- Delegate responsibility and decision-making authority to others to complete tasks you cannot complete or do not know how to do.
- Be specific! Don't hesitate to make your project plans as detailed as you want. It may save you work or avoid confusion with your project team.
- Determine what support you need from others and bring those individuals into the planning process early. If they are involved in the planning process, they are more likely to feel invested in the eventual outcome of the project.
- Stick tenaciously to the plans you make and stay organized as you work on them.
- Allocate more time or other resources to potential problem areas before they become problems.
- Once a project is complete, review how you approached it to determine how you could have planned better. Use this knowledge as you create new plans.
- Re-evaluate your goals periodically to make sure they remain in line with your organization's priorities.

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Activities

Activity 1: Volunteering to Learn

Volunteer to take part in a planning process. If there is a new project being implemented in your department, a new procedure being designed or any event being planned, attend planning meetings and observe others as they work. If you are comfortable participating in the planning activities, ask someone you trust to monitor your participation and work output.

Activity 2: Taking Action

Think of a recent situation in your workplace in which you let a project slip between the cracks because you were uncertain of how to proceed. Or think of a recent group project that someone else really seemed to take initiative to organize. Try to answer the following questions:

1. Why did I let that project slip between the cracks? What action could I have taken to rescue it? Who could have helped me?
2. How did the project organizer get the project moving and keep it on track? Who was asked to provide assistance or direction?

Think of a current project or issue that seems to be stagnating from lack of direction. Is there a committee that has never met to plan the company holiday party? Is there a proposal due to a client, but no one has started the proposal process? Try to establish the following action list for yourself:

1. Who are the key players in the project decision making process?
2. When can I hold a kick-off meeting to discuss making progress toward the goal?
3. How can I keep those people actively involved in pursuing the goal?
4. What resources can I offer to the project?
5. What resources do I think others need to contribute?

Once you have investigated the issue thoroughly, it will probably become clear what your role can be in pushing the project or problem to resolution. When you have defined roles and responsibilities among project team members, be explicit about expected results and deadlines. Make sure you follow up not only by completing the task or tasks you are responsible for, but by also calling follow up meetings and asking other people for updates on their progress.

Activity 3: Project Planning

Identify a project that involves multiple resources and a significant amount of time to accomplish. Then, try to complete the following tasks with that project in mind:

- Identify the Project
- Set a deadline for completing the plan you are creating.
- If necessary, establish a budget for the project.
- Determine how the project fits in with the organizational objectives.
- List up to five specific critical goals related to accomplishing this project.
- List as many less critical goals as you can think of.
- Prioritize your list of goals based on how important each task is, what tasks are related to others and/or timelines.
- For each goal, determine who should participate in reaching the goal and what their deadline is for accomplishing it.

Once you have completed your planning process, confirm the completed plan with your manager to determine if it is accurate and complete.

Activity 4: To Do List

Every day this week, create a carefully thought out to-do list. Once you have written each task, prioritize each as urgent, less urgent or not urgent. Re-evaluate your list and add new tasks as they come up.

