



TriMetrix®HD Long Range Planning

Long Range Planning

The ability to identify long-range goals and design realistic plans to attain them; the ability to see the big picture and then determine what direction to take and how to use resources to attain future goals.

Why is this skill important?

People who are good at Long Range Planning are able to effectively "see into the future," forecast needs, and comprehend how certain situations or procedures will meet those needs. In contrast, people who aren't as good at Long Range Planning may be too oriented to the "now," and they may spend more time solving current problems and attaining immediate results than planning for their future successes.

The first step toward becoming effective at Long Range Planning is understanding not only your own role in your organization, but understanding how your plans match up with your organization's strategies and goals—understanding the "big picture." Professionally, you will only succeed if your plans support the organization's plans. So before you can perform strategic day-to-day tasks, you need to develop top-level and long-range plans to support your organization's mission and direction.

Long Range Planning requires that you:

- Identify and prioritize multiple long-term goals or missions effectively.
- Establish a completion date for projects you are involved with—this could be management-mandated deadlines or a personal or team deadlines.
- Identify key milestones toward meeting the final deadlines—set dates to these milestones to ensure you complete them on time.
- Manage resources appropriately to enable progress toward multiple projects.
- Get "buy-in" from key individuals who will assist in completing each project.
- Check your (or your team's) progress regularly to ensure key activities are getting completed on schedule.
- Evaluating new projects in relation to existing priorities.

In short, you must ensure that your top-level plans get completed in the real world of day-to-day business. Goals and tactics you defined in your top-level planning process need to be part of your daily, weekly, and monthly plans—these plans form the basis of your everyday activities.

What are skills associated with Long Range Planning?

Someone who has mastered skills associated with Long Range Planning:

- Identifies future goals with clarity and direction.
- Is able to link personal and department missions to specific corporate initiatives.
- Has the capacity to think in advance rather than reacting to events as they arise.
- Is able to coordinate tasks toward completion of projects with due dates in the distant future without procrastinating or causing bottlenecks.
- Is able to identify effective resources for completion of strategies.
- Ensures plans are initiated, followed, and adjusted as necessary over time.
- Has the capacity to prioritize and reprioritize as necessary.

How do you develop your own skills in Long Range Planning?

- If you don't already know it, learn your organization's current mission and strategy. Periodically reassess your organization's priorities.
- Confirm your understanding of your organization's mission with members of your organization's management team.
- Make sure your goals are parallel and support those of the organization. Identify critical success factors you and/or your department must achieve to realize your goals.
- Make time for planning, even when time is short. Most likely, the time you spend carefully creating a plan will save you time in completing the project.
- Carefully develop strategies to reach your goals—good strategies can save (and make) you time, money, and energy.
- Make sure your specific goals are realistic ones achievable with the 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, and 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.
- If you are working with a project team, take time to explain to each team member how their work fits into the scope of the project.

- Determine what support you need from others and bring those individuals into the planning process early. If they are involved in planning, 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.
- Prioritize tasks from across all of your project plans each day, and make sure you accomplish key tasks for each project so you stay on plan.
- Identify potential problem areas in your plans, and prepare multiple possible approaches to ensure problem resolution.
- Allocate more time or other resources to potential problem areas before they become problems.
- Monitor your progress as you work toward completion of projects and check often to make sure you (or your delegates) have done what you were supposed to do. This is especially important in high-risk task areas.
- 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 an 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: Developing A Long Range Plan for Your Department

Develop a plan for an upcoming activity in your department. 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:

1. Project Name
2. Set a deadline for completing the plan you are creating.
3. If necessary, establish a budget for the project.
4. Determine how the project fits in with organizational objectives.
5. List up to five specific critical goals related to accomplishing this project.
6. List as many more or less critical goals as you can think of.
7. Prioritize your list of goals based on how important each task is, what tasks are related to others, and/or timelines.
8. 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 management to determine if it is accurate and complete.

Activity 3: Analyzing Your Plan

For the project you established a long-range plan for in Activity 2 above, work on creating contingency plans for everything that could possibly go wrong in the course of the project.

Analyze each component of your plan for critical decision points and possible areas of risk.

1. What activities absolutely must occur to guarantee success of the project?
2. Where are areas of potential communication breakdown?
3. Is there a "learning curve" for any or all parts of the project?
4. Are resources you need readily available (documentation, staff, time, etc.)?
5. What other things could go wrong while trying to complete this project?

Activity 4: Developing A Long Range Plan for Yourself

Develop a plan for something that is important to you personally. Think of something you have been meaning to accomplish but haven't due to time constraints. Say you are thinking of building a deck in your backyard, learning to speak Spanish, or get in better shape. Then, try to break the activity into multiple tasks—you'll be much more likely to accomplish it if it is in "small bites". Make sure you are clear about deadlines—your own personal goals are no less important than ones you are trying to meet at work!

1. Project Name
2. Set a deadline for completing the plan you are creating.
3. Does your idea require a budget? If so, establish one.
4. List up to five specific critical goals related to accomplishing this project.
5. List as many more less critical goals as you can think of.
6. Prioritize your list of goals based on how important each task is, what tasks are related to others, and/or timelines.
7. Determine if you need support from someone else to accomplish each goal, and ask him or her for assistance.
8. Start acting on your plan!

