Anyone who has worked in management or leadership has done planning of some sort or another! Experienced successful leaders tell us that they take time to create plans and visions, but they will also allow for course adjustments along the way. If a project goes off entirely without a hitch, there is probably something you are missing!

The term Vision or Project for this article is synonymous and will mean a result that requires multiple steps to complete. You can use this process for complicated strategic planning for a business or get your car inspected when it needs new tires, exhaust, and brakes!

We must understand the difference between a leader and a Manager for this article. If you are a team of one, you must effortlessly cross between these two roles. The leader creates the vision. The manager implements the plan and makes it happen!

Below I will lay out the steps to a good planning process, and we will discuss some of the common pitfalls that quite often happen.

I have broken the planning process into two sections: the initial and implementation phases!

As seen here in the graphic, I have developed the PLAN system for the initial planning phase, which you can use as a quick reference. Below is a full explanation of the system.

PLAN System

**Initial Phase of Planning using the PLAN System**

1. **Create the Big Picture Vision**

**a.  Plan to Plan** -- Make sure that you allow the proper time for planning. Planning is the first step to creating a good strategy and getting a handle on what things will need attention, possibly before and after the planning process. You will want to make sure you allow proper planning time and plan for the impact to your daily task for the duration of time you will be taking away from the routine daily grind for the planning process.

**b. Determine your principal purpose** -- What is the big picture? What are you trying to pull off? The more work you can put into this upfront, the easier the rest of the process is. You must pull back and create the big picture at this stage. If you don't know where you will go, any road is the right road! As Stephen Covey has written about, you will want to begin with the end in mind! Create a detailed picture of what the result will look like! It would be best to refine this big picture until you can communicate the vision. It should also be created in the fashion of from to by date. For example, our company will increase our throughput from 100 PCs per hour to 150 PCs per hour by 12/31/2022 by installing a robot on line one.

**c.  Consequences of failure** -- Once you know the big picture vision, you need to establish the consequences of failure! I'm not insinuating that you create a time-out chair and set those who don't complete their task in it, although I have sometimes considered it! We now have a big picture vision; we need to instill what the picture looks like if we fail. The consequences of failure will help to keep all focused on the result. An example would be a Washing Machine company that decides that times are changing, and they are going to put all their funds and effort into creating a new line of IoT-controlled machines and abandon their existing lines. The result of this vision, if it fails, could very quickly be closing the business and a loss of jobs. If you communicate this clearly, it will change how everyone handles their task and goals related to the vision! The vision of failure is as important as the vision for success in the planning phase. This vision of failure can also help you weigh the risk before putting the plan into action!

**d.  Assess the situation** -- Once you have the big picture established, you will want to spend significant time figuring out where you are today. If your goal was to save $10,000, you could see how your process and task may differ depending on whether you have $8,000 or $0 already set aside. At times it would seem easy to skip this step, but you want to make sure that there is nothing hidden that you don't know about your current situation. You will want to ensure that everyone participating in the initial phase has this knowledge.

**e.  Ask the right questions** -- Who will lead each task? What are the metrics that will be measured? What does success look like? When will we evaluate? What will the Market do? Do we have revenues to do? Asking the right questions is often overlooked during the planning period, but it is as important as setting the big picture. Many times these questions will also uncover hidden items to be addressed yet! For example, imagine implementing a plan without knowing the business unit's financial standing. You hit a brick wall halfway through the project because there is no funding available! The catastrophe could have been avoided by asking the right questions at the beginning! You also need to understand how important setting the correct evaluation questions at this point is. These questions will determine how you and your team will measure your success. Asking the right questions will also find potential leaders within your team by their answers and interactions!

**2.  Pinpoint Specific Goals**

Write out all created goals and, most importantly, make sure they are measurable, convictional, and realistic. The worst thing you can do at this point is to create a goal that is unreasonable or unmeasurable. Make sure the entire team participates in this exercise.

**3.  Link Goals and Owners**

Another crucial part of setting these goals is setting the responsible person. One thing to keep in mind here is to be absolute about who has the power to complete the task. The leader could easily assign the responsibility of a task incorrectly. Here is an example of this. An assistant has volunteered to call prospects. Still, the database of prospects is only accessible by the sales manager. In this case, who ultimately would be responsible for the task? With current roles set the way they are, it would ultimately be the sales manager! It is probably apparent to those reading this that the goal would need to be split, with the first task being the sales manager granting access to the database to the assistant and then the assistant to make the calls. Leaders must use care and caution to ensure that the task owner has complete control of what they need to complete the task! If this is not the case, we run the risk of failure of this task and possibly derailing the entire vision!

**4.  Add Task**

Now prioritize all needs, situations, and tasks to address each goal. Again, you will want to make sure that there is nothing hidden from view and all of your team agrees on the most critical sub-goals and tasks needed to be successful. It is important that the the goal owners are part of this process. You want to be sure that you give the goal owners the ability to have input into the task for later buy in. Now you and your team start putting together the timeline and assign a deadline for the vision!

Leaders do not kill time they execute it!

*John C Maxwell*

**5.  Name Key Dates**

Schedule everything that you can on the front side! Set the deadlines and get things on your calendar. When working with a team, ensure they have access to these deadlines and dates. A great Vision without a completion date is nothing more than an idea!! If the leader is tracking and has communicated this with all involved, it will create accountability. There are a few things that must get on the calendar outside of the task deadlines:

* Scheduled times to give updates on the progress of the project
* Scheduled ways to get all primarily and secondarily involved to participate in the process
* Schedule ways to remind everyone of the big picture throughout the vision. It is easy during any project to lose focus on the big picture and get stuck in the weeds!

**6.  Budget everything you can**

You will want to take the time and look at each task and goal and budget the time it will take and the amount of money it will take to complete the vision. I have participated in many plans that had no budget. When you get to the middle of a project, the leader says, why are we spending this money? It becomes evident that there is a disconnect between leadership and managers. The lack of budget can sometimes lead to frustration. If you successfully do something without a budget, to only be criticized, you will inevitably become disenfranchised.

Caucasian woman writing project plan on white board

**Implementation of Plan**

1. **Clarify and communicate** -- How many have ever been surprised when your manager lets you know the task you have been working on is critical to achieving a Vision? It is tough to succeed if you don't see the vision or the big picture! We want to be sure that we communicate and communicate regularly about our Visions, goals, and evaluation of such. It is good to set dates for all involved to get updates. Whether this will be in-person events or just through digital communications, it is good to communicate throughout the process continually. If you do not, it can lead to losing focus during the process.
2. **Obstacle hunting** -- Now that you have a vision, goals, and established ownership within the team, and communicated outwardly, it is time to start looking for additional obstacles. You will want to walk through each goal and look for potential barriers mentally. Leaders should communicate with their team continually as the vision progresses. You will want to have an open system approach to your planning at this point and be sympathetic to your environment. There will be obstacles present themselves during the duration of the project. When these things pop up, you will want to refer back to the vision or big picture and see how you can overcome the obstacle and stay aligned with the vision!
3. **Monitor and correct course** -- many writers have compared a plan to achieve a goal to an airplane or cruise liner. An airplane spends most of its time off the path, and the pilot spends most of their time making course corrections. A good leader must take this approach or risk ending at a destination they were not expecting! Nothing like showing up to the tropics with only winter clothes!
4. **Study and evaluate** -- Study the results from each goal as they come in and measure only against the agreed-upon metrics. Sometimes we forget what the agreed-upon metrics were. An example would be an executive with an approved Vision to lose money for a year because of planned investment in the production facility. The board of directors fired him because his net profit is down compared to last year! These things can happen if we are not constantly communicating about the goal and where we are in the process.

As stated earlier, projects will not go entirely without hitches. Therefore, it is also imperative that we practice mercy and grace when things go sideways for our staff and task owners. When someone is working on a specific task or goal related to the vision, and it does not go as expected, we should help that person see how to correct course while staying in line with the vision agreed.

Also, we should note that it is crucial that everyone working to achieve the goal understand the ultimate goal and how their part of work will interface with others. People tend to do a better job when they completely understand how their work will help achieve the goal!

Project plan with pen