

## Members Quarterly

Spring 2014 Edition

### Ask the Expert

## Joint Planning: The Path to Success

*Involve all stakeholders in the process*



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**Q.** As a former professional CFL Head Coach, what experiences and advice in joint planning can you share with us?

**A.** Joint strategic planning is essential to producing a winning formula. In sport or business, it is critical to the overall success of every organization.

The April 2013 Annual Meeting of the Association for Strategic Planning of top non-profit organizations found that 93% of successful organizations reported that strategic planning has “some to critical impact” on overall success.

There are many facets to joint planning. The number one ingredient is to be diligent in the planning stages.

To be successful, a project requires chronological or calendar time to be allotted on two main segments: planning and execution. The rule says that 55% of the time should be assigned to planning with the balance applied to execution. Intuitively, that means much more time should be taken to plan than often happens.

There are many models for joint planning. One factor is not discussed enough. This is the relationship between the project leader and all the levels of management within an organization. It is often the middle manager that has all the responsibility accompanied by all the accountability. Personal experience has taught me that during the planning stages, these relationships are crucial to the overall environment.

### Influence in the management tree

As middle managers, we are often at the mercy of not only those people above us but also those below. The key to success is to create and maintain influence in the management structure. “Yes, I know”, easier said than done. As a professional, your greatest triumphs and worst defeats will depend on that concept.

### Devise a plan to include all levels of management

The concept of joint planning (cooperative or strategic planning can also be used) refers to all levels of management developing a plan for the project at hand. If every level of management has input and contributes to the plan, they will have shared ownership of the outcome. This type of responsibility for the outcome should create shared levels of accountability. The best chance for success comes if all the leaders involved have a shared stake in the success of the outcome. Success can only happen if the strategy is planned jointly.

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#### **5 simple steps to engage all levels of management:**

1. Clearly define what a successful outcome to the project means to every level of management.
2. Determine what resources each level of management is willing to assign to the project based on their vision of success.
3. Ask for guidance as to who will be responsible for the execution of each project phase.
4. Develop an acceptable timeline for completion of the project and have it agreed upon by all levels of management.
5. Get buy-in on an appropriate maintenance plan.

#### **Apply a project management process**

The challenge is to ensure proper execution of the plan. There needs to be a structured set of processes (a project management approach) that steers the plan and keeps all levels of management on the mark. You should set dates for execution agreed upon by management for each phase of the plan, assign dates for completion and assign responsibilities to each level of management. You should also hold maintenance and review sessions with management at strategic points in the plan.

#### **Maintenance is a must**

Project review meetings consist of all levels of leadership sharing their recent and upcoming achievements and challenges, and reviewing them with the other leaders to determine if they are in line with the previously established plans and strategies.

1. Structured meeting times and agenda with all levels of management to review the plan.
2. Rewrite or change any deviation in the plan.
3. Review the changes and get buy-in from all levels of management.
4. Maintain communication and progress from those doing the heavy lifting. They are your eyes, ears and barometer to success.

#### **Challenges**

It will always be a challenge to set the direction of a project as a middle manager or on-site worker. The people to whom you are accountable and those who are responsible for the execution will have different motivations. Finding ways to link all levels of the organization will be your shining moment!

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