

Planning for Results

Saving Hours and Dollars

by Creating a Plan

by Jim Heaney, Heaney & Burns

Planning is just an organized form of worrying. With flat sales, 12 packs of premium product selling for \$4.99 and not enough drivers with CDLs to go around, wholesalers have more than enough to worry about. Today, results delivered in a cost-effective manner are critical to success.

At times like these, people flock to planning and time management workshops looking for an edge. Let's look at some practical tips you can use to plan for improved results.

We all use some sort of planning whether formal or

informal — the “to do” list or a time management plan, a diet or a food plan, a budget or a spending plan. Put that way, the word plan sounds even better. Since time began, people have been looking for ways to more effectively use their time and energy. This is especially true in hard times — times when there are not enough time, money or resources to get everything we want to do done.

Why Plan

Most of us lead our lives doing the things that are both important and urgent. For many of us, other people generate most of the urgency in our lives. This approach to life leads to bun-out and leaves little time for things that are important but just not urgent. Planning is one of those things. Most of us get by day-to-day without a plan. We have been doing it for years. Part of the reason we do not plan is because we think that at some level it is a waste of time. “The best laid plans of mice and men. . . .” Our language is full of anti-planning comments. Eisenhower may have said it best when he said that it is not the actual plan that is important but the process of thinking about the situation in an organized way.

What we learn in the planning process will help us later as we move into action, no matter how much the situation has changed.

Have you ever known someone who discovered that they had a serious health condition and then really started living their life to its fullest? When we have no time to waste, we often gain clarity. Time is a commodity that life distributes equally. To the rich and poor, the bright and the dim, five minutes is five minutes. The question is how we use those five minutes.

It may be less important to prioritize the tasks on our to-do lists than it is to make time for the priorities of our



lives and our businesses. Planning is a priority for successful people and distributorships.

Planning does a number of important things for people and organizations even if the reality turns out different from the plan. It provides security, offers hope, gives people in the workplace a chance to feel included, establishes an anchor, and can turn problems into opportunities.

Planning Your Approach

The following is a simple yet effective 10-step formula for planning just about anything.

- 1. Set a clear focus on the end product you want to accomplish.**
- 2. Think about what can go wrong and what strengths you have to overcome these issues.**
- 3. Determine a way to avoid problems and fully use your strengths.**
- 4. Determine the resources needed to accomplish the objective.**
- 5. List the activities required sequentially with your best estimate of the time required to do them.**
- 6. Establish due dates and the person accountable for the task being accomplished.**
- 7. Gain whatever approvals are necessary to fully commit the people.**
- 8. Set up a monitoring schedule.**
- 9. Move into action.**
- 10. Critique the results so you can continuously improve.**

Clear Focus

It is critical to have a strong vision of what the outcome will be before we start planning. Outcomes that we state in terms of how much, of what, by when, at what quality and cost are concrete. Therefore they are easier to conceptualize and plan for. Goals stated in sloppy language such as “improve customer services” are harder to realize. It would

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be much stronger to say “develop a sales and service strategy within the next 30 days that provides more of the service retailers would like and will cost the company less than our current approach.” Before moving forward, it is important to check that the desired result is reasonable, understandable, measurable and attainable.

In setting a plan, it is helpful to answer a few questions:

- 1. What do we want the final outcome to look like?**
- 2. What is the current situation?**
- 3. What are the facts?**
- 4. What has been done?**
- 5. How would an outsider look at this situation?**

What Can Go Wrong?

As Murphy said, if there is a wrong way to do something, then someone will do it. Planning is both a skill and discipline requiring practice and patience. The temptation for action-oriented people is to get an idea and run with it. . . Ready — Fire — Aim. Spending a few minutes in the front-end thinking about what can go wrong will pay enormous dividends. There are six basic things that can go wrong. The following checklist will help you isolate what can go wrong:

- **Mixed expectations about the project and its importance;**
- **A lack of skills, knowledge and experience with the people involved;**
- **Limited resources to apply to the project;**
- **Outside forces that get in the way or divert attention;**
- **Other people involved in the project who may not have sufficient motivation to do their part; or**
- **The result you desire from the project just isn't possible.**

Ways to Avoid Problems

Consider the 20/80 rule. Generally a small number of factors have the greatest impact on the situation. For instance, 20 percent of your product line probably accounts for 80 percent of the sales and profits. Determine what those critical factors are and apply your energy there.

1. **Clear up expectations. Ask people to describe the final outcome. Check to be certain that they understand the consequences associated with the project — why the project is being done and what are the benefits of its success.**
2. **Check to be sure people have the skills necessary to perform and provide any training needed to accomplish the objective.**
3. **Make a list of the resources necessary and be certain they are available.**
4. **Forecast as best you can the outside forces involved and how they are likely to play into the situation.**
5. **Spend a few minutes asking yourself how what you are trying to do will affect the other people involved. A few minutes of empathy and trying to understand what is in it for each person involved can save hours and dollars.**
6. **Do a reality check. In the end, the most critical piece of front-end thinking revolved around answering the question: "Do we really need to do this and is it possible to do?" Often people live in a fantasy world when it comes to thinking about what they need to do in the future.**

Next comes the creative part of planning — brainstorming — where you look at the possible ways to accomplish your objective in the face of what can go wrong. The following questions may be helpful:

- **What are the possibilities?**

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- **What other ways are there for solving this problem?**
- **What does the data imply?**
- **What are the implications beyond the facts?**
- **What is the problem analogous to?**

Resources

Over the years, we have developed the following resource check list. It may help you to be sure you have considered everything?

	Time
	Budget
	Authority
	Information systems
	Controls systems
	People
	Materials
	Work methods/rules
	Machines/equipment
	Management support
	A place to go for help

Time Requirements

Put in sequence the steps you will require to gain the desired result and estimate the time that it will take for each step. Check to see if you have sufficient time to apply to the project and if you can meet the deadline. Otherwise you may need to reset your objective or go for an alternative. Many people tend to over commit. It is not until they see a plan in black and white that the reality sinks in. Some well-done planning can prevent last-minute scrambles and missed deadlines.

Task	Time Required
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Due Dates and Accountability

People do better when given a target date. It is also critical that someone feels directly accountable for accomplishing a given task. Add these columns to your plan:

Task	Time Required
Accountable Person	Due Date

Approvals and Commitment

Without solid commitment, even the best plans fail. Answering the following questions will help you assess your level of commitment:

- How much do I care about what I gain or lose from putting this plan into place?
- How will the people concerned react to the outcome?
- Who will commit to carrying out the plan?
- Will the outcome contribute to individual or group harmony?

Gaining a written commitment from those involved in a plan increases their level of devotion. We strongly suggest that you have everyone who will be supplying time, money and efforts sign off signifying their commitment to the plan.

Monitoring

Establish dates ahead of the due date to review the progress. This action improves the likelihood that people will do the task acceptably and on time. By monitoring the plan along the way you maintain focus and again avoid last-minute scrambles. When the outcome is critical to you, delegating important tasks can often produce stress. Monitoring is a way to provide yourself with some comfort and free up your time for other tasks.

Action

Now you are finally ready to move into action. Plans without action are only fantasies and actions without planning often lead to re-doing the action. As the wise carpenter said, "Measure twice and cut once."

Critique the Plan

Often at project's end, we heave a sigh of relief and move on to the next urgent task. It is often wise to pause and again do something that is important but not urgent — critique the process. Chances are a similar project will

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come along again. The Fourth of July comes every year and we still have to locate the inflatable can and the draft box or whatever the items we may need for the holiday. You can save time and aggravation in the future by creating a checklist for the project and building a file of action plans that you can refer to and update.

At the end of each project it is good to ask two questions:

1. What worked well?
2. What would we do differently if we had the project to do again?

Although we cannot change the reality of the current situation, we have a choice about how to handle it. We can respond by planning and then moving into action or we can react and pick up the pieces later.



*Jim Heaney is a principal in a management consulting and training firm, Heaney & Burns, with offices in Bethesda, Maryland, and Los Angeles, California. This article is drawn from the **Focus on Results Program** that has been used by beer wholesalers since 1979. For information on the program call (301) 229-5229.*



National Beer Wholesalers Association
1100 South Washington Street • Alexandria, VA 22314-4494
Telephone: (703) 683-4300 • Fax: (703) 683-8965
Internet: <http://www.nbwa.org>