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# Planning for Success

Every day we manage a multitude of meetings, tasks and emails with one purpose in mind - to achieve results. But how often do we stop to check that we are really doing the right activities?

It is fair to say that most of us intuitively know what we should be working on, and that a lot of the time, the inputs we receive from others drive the work we do. If we are organised, we can be very efficient and get a lot done. But with a little time spent planning, we can move beyond efficiency and start to work effectively!

Working effectively is not just about doing our work efficiently, but doing the *right* work efficiently! This article aims to provide a simple planning process that any knowledge worker or manager can incorporate into their routine.

## Why spend time planning?

We are all busy! It is hard to take time out to plan when so many things demand our attention right now. Planning is a discipline, and being disciplined comes down to doing the things you should do, even when you don't feel like you have the time to do them.

While most people do practice some form of planning in their role, it is often quite ad-hoc.

Planning for success does not take as much time as most people fear, and can yield the following benefits:

- ◇ Helps to get you organised and up to date
- ◇ Increases your focus on your priorities
- ◇ Reduces procrastination
- ◇ Allows you to work more proactively

- ◇ Creates a link between your activities and your objectives
- ◇ Helps to get the 'rocks' into your schedule

## Rocks & Sand

Stephen Covey, author of *First Things First*, often used the analogy of putting rocks and sand into a jar. The jar represents your week, as it has a finite amount of space, just as your week has a finite amount of time.

The rocks represent the high value, important activities that you could or should work on to achieve your objectives. The sand represents all of the other "stuff" that consumes your time each week.

Invariably, our "jars" fill up quickly with sand, and leave little space for any rocks. So he poses a question; "How can we get more rocks into the jar?" The answer - put the rocks in *first* of course!





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Now ask yourself honestly, do you put the rocks in first? Do you take the time to plan and schedule the proactive activities that you should be working on (before you are forced into action because you have run out of time), or is your schedule full of “stuff” that has been driven by other peoples demands?

It is important to note here that we are not suggesting that you stop answering your emails and attending meetings so you can work exclusively on the proactive. We believe that your schedule should be a balanced mix of proactive and reactive work.

The Adapt Planning Model will help you to get organised, get focused, and get the important rocks into your schedule.

## Planning Points

The first step to incorporating a robust planning process into your routine is to identify your Planning Points. These are regular points in time where you should stop and take some time out to think and plan. The diagram in the middle outlines some recommended planning points.

As the first two levels are driven by the organisation, this article will not cover these areas in detail, but will focus on Monthly Outcomes, Weekly Plan and Daily Focus, as they are within your direct control.

**Performance Plan:** This is usually an annual process, and is driven by HR and management. It should set out agreed objectives for your role in a number of key performance areas. As this is driven by the organisation, this article assumes that this process is in place and is robust.

**Quarterly Review:** This is also driven by the organisation, and may be half-yearly or quarterly. It is a checkpoint to track progress against objectives, measure performance and discuss any issues. Again, we will assume that this is in place and being managed effectively.

Your performance plan and quarterly review will help you to identify three proactive drivers of your work:

- ◇ Your Goals and Objectives - the outcomes that you are being measured on
- ◇ Your Roles - the different areas of responsibility that you work within
- ◇ Your Projects - Any multi-step chunks of work that you are responsible for delivering

**Monthly Outcomes:** This is the first of three planning points that should be driven by you. The main focus of this planning point is to review your objectives, your roles and your projects, and identify some appropriate outcomes to be achieved by end of month.

This will help to guide the appropriate proactive activities for the month, and create a link between activity and objectives.

**Weekly Plan:** The weekly plan will get you organised for the week ahead, and will help you to consider how you are going to achieve your main priorities in the time that you have available. A quick review of your objectives, roles, projects and monthly outcomes will also ensure you are making the best use of your time.

**Daily Focus:** This planning point is about getting focused for the day ahead. Your daily plan is one of the most important tools for productivity and, as a result, must be focused, realistic and achievable.

Each of these planning points are described on the next page.





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## Monthly Outcomes Process

**Purpose:** To review your objectives, roles and projects and set monthly outcomes you want to achieve.

**Time:** 1-2 Hours

**What you need:** You will need access to your performance plan, your active project files and a list of your roles & responsibilities, both work and personal. You will also need to have access to your calendar and task list.

We recommend that you schedule a monthly recurring appointment with yourself in your calendar to do your monthly planning. This can be at the end of the month, or the start of the month. Use the following process:

1. Review your performance plan and reflect on the progress you have made in the previous month towards your objectives. Do the same with any projects not in your performance plan.
2. Identify outcomes for the month to progress your objectives and projects. What would you like to have achieved by the end of this month?
3. Schedule a next step into your calendar or task list for each outcome. These are your 'Rocks'.
4. Check the balance! Review your list of roles and responsibilities, and schedule any additional rocks to ensure you are spending a reasonable amount of time on each role. This could include personal roles such as 'health & fitness' and 'family'.

To help with this planning process, we recommend using the **Adapt Monthly Outcomes template**, which can be downloaded from [www.adapttraining.com.au/productivitypapers.html](http://www.adapttraining.com.au/productivitypapers.html)

This template has been designed to live in your calendar and provide quick access to your list of Objectives, Roles, Projects and Monthly Outcomes.

“Productivity is never an accident. It is the result of a commitment to excellence, intelligent planning and focused effort.”

Paul J Meyer

## Weekly Planning Process

**Purpose:** To close off this week, get organised for next week and anticipate upcoming deadlines and events.

**Time:** 30 minutes - 1 Hour

**What you need:** You will need access to your calendar and task list, your email and your monthly outcomes list.

We recommend that you schedule a weekly recurring meeting with yourself in your calendar, preferably on a Friday morning. If Friday does not work, choose a day and time that is usually free of meetings, and try to take yourself away from email and interruptions.

Use the ROAR process to plan your week:

**R**eview - Review your activities from the *week just gone*. Ensure that you have tied off all of the loose ends. Identify any activities that need to be carried over to the following week.

**O**rganise - Organise your schedule and priorities for the *coming week*. Review your calendar schedule any necessary preparation and travel time. Organise your priorities and tasks for the week.

**A**nticipate - Scan ahead over the coming weeks and anticipate. Identify upcoming deadlines and schedule the required actions now so that they are not left until the last minute. Plan for upcoming travel, presentations and reports due.

**R**ocks - Check that the rocks are in. Review your Objectives, Roles and Projects to connect with the bigger picture. Schedule any missing rocks that come to mind.



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## Daily Focus Process

**Purpose:** To put a plan of action in place for the day ahead to ensure you are focused and productive.

**Time:** 10 minutes

**What you need:** Access to your calendar, task list and inbox.

A few minutes spent bringing your day into sharp focus can increase your productivity enormously. It will also enable you to be more flexible as things change, allowing more effective decisions about competing priorities.

Some people like to plan the next day before they leave the office, some prefer to plan the day first thing in the morning. As long as you do it, we don't mind when!

1. Review your meeting commitments for the day, and estimate the discretionary time available for doing tasks.
2. Clear your Inbox and In-Tray and schedule any important or urgent work that needs action today.
3. Reschedule, Delegate or Dump any non-critical or unachievable tasks that are sitting on today's task list.
4. Add any additional priorities you can think of.

Make sure your daily plan is focused around your key priorities for today. It needs to be achievable and realistic, and should provide direction for you through the day.

Remember "*Plan your work, and work your plan*".

## Conclusion

So, we have discussed a suite of planning points that work together to ensure a tight connection between what you do on a daily basis and what you are trying to achieve overall. A worthwhile endeavor indeed.

But there is a catch. Finding the time to do all of this planning. How do you fit it all into your busy schedule?

Give it a go! Commit to it! Schedule the time into your calendar and don't give it away. In the scheme of things, it is a small investment for a large return.

Between your monthly, weekly and daily planning points, you are looking at spending about 10 hours planning a month. If you work an 8-10 hour workday, that is only about 5% of your time spent planning how you will use the other 95%.

We reckon that is time well spent!



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