

Planning Possibilities

News & views brought to you by Michelle Coussens

Welcome to my November 2018 Issue!

Contingency planning is one of the most important parts of planning for the future. Anticipating potential issues that may arise and creating back-ups is increasingly a necessity in this very uncertain world. Whether it is a natural disaster, terrorist attack, hacker intervention, or a crashing server, such plans can make the difference between surviving and thriving. Inclusion of risk management strategies requires a close look at workflows, datasets, locations, people, and other resource dependencies. If you haven't fleshed out your critical points, you may want to do so ... before it is too late.



Michelle

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Planning for Good Decisions

Prepare
Communicate
Execute

PLAN B CONSULTING MISSION STATEMENT

To assist organizations in becoming more effective and efficient through practical business planning, resulting in meaningful and measurable outputs, outcomes, and impact.

In creating plans for the future, careful selection of projects must occur. The project selection process should be rational and consistent, consisting of two parts:

- 1) Projects are individually evaluated on their own merits.
- 2) Projects are then evaluated in comparison with each other and in relation to the organization's or department's total capacity.

Learn more about project selection on page 2.

Project selection and criteria of choice

Organizations should use consistent and rational tools to select among the myriad of projects from which they have to choose. There are many models to choose from for the selection process, as well. Whatever model is used, it should take into consideration the organization's resource constraints. In addition, it should adequately factor in project to project overlaps in timing, resources, and objectives. And, it should be easy and inexpensive to use, allowing understandable explanations to be shared with those proposing projects.

Many organizations find that they have three basic kinds of projects in their portfolio: compliance (emergency-must do), operational, and strategic projects. Compliance projects are those required to meet regulatory conditions. Emergency projects are examples of projects that are corrective in the immediate short-term and are often caused by catastrophes or unforeseen issues. Operational projects are those designed to improve the efficiency of delivery systems, reduce product costs, and improve performance.

In selecting projects, it may make sense to establish a selection committee to solidify the proposal requirements and selection criteria. Once proposals are submitted, they should be individually evaluated against resource availability and strategic priorities. Any projects passing that phase should then be reviewed in conjunction with the other contenders to determine how they would impact each other in terms of timing and resources.

Planning Predicaments: When tracking can start to feel like a trek

*Where
planning
concepts
meet
reality*

Tracking progress is imperative to heading off small setbacks before they become major issues. Many organizations use dashboards and stop lights (red, yellow, and green) to indicate if a project or a task within it is running on schedule. But, if the tracking process becomes too ornate and cumbersome, it can actually take valuable time away from actual progress efforts. The trick is finding the balance.

There are many ways to track progress, from status reports to meetings. Technology can certainly be a help here. It seems that the best approach can be somewhat situational. How significant is the project? How visible is it? How risky is it? How much room is there for error? What tasks are most critical? Are the people working on it reliable experts? These are some of the questions to consider in determining your "track".

Online Plug of the Month



TLNT is a website that provides useful tips related to talent and HR management. Published by ERE Media, which was created in 1998 as an online gathering place for recruiters, has become a place for publications and conferences on these topics, as well as webinars and the TLNT newsletter.

A recent article that caught my eye was titled, "The Total Cost of Your Workforce Is Not What You Think It Is", by Ian Cook, Director of Product Management at Visier. He discusses the underlying and cascading costs associated with a workforce that go well-beyond salary and benefits. He also discusses how to segment your workforce to be sure you have enough (but not too many) of the right people at the right time. Check out the website and sign up for their newsletter at: www.tlnt.com.

Communication Corner

Brainstorming plays a vital part in the strategic and business planning processes. People from different vantage points come together to share their unique perspectives, which can lead to new ideas and opportunities.

There are many ways to collaborate through brainstorming. The traditional technique is to come up with topics on flip charts around the room, with no judgment of ideas during the generation process. However, there are many variations on that exercise today. For instance, I have worked with some groups where they bring laptops that plug into a common projector, and they post bullet points to topics or questions that appear anonymously on the overhead screen. This allows people to be together and build off each other's ideas without feeling intimidated. I have also done room rooms where teams work on one topic and then switch and have facilitated mindmaps.

What techniques have you used, and how have they worked?

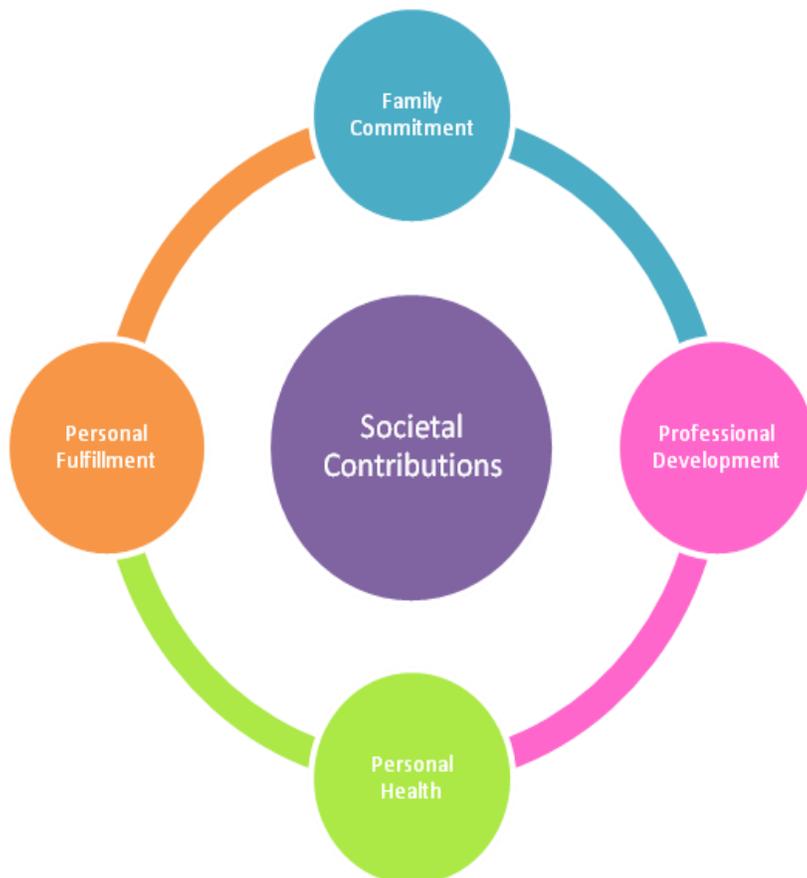


Book Banter

**Be a Hero: The Essential Survival Guide to Active-Shooter Events, by
John Geddes and Alan Rees, 2017, Skyhorse Publishing.**

I chose to read this book because of all the mass shootings in our country. I wanted to see if there were things that organizations could even incorporate as part of their strategic plans. Although the book is only 143 pages, and indeed filled with lots of tactics for various life-threatening situations, I had a lot of difficulty forcing myself to finish it (I have had it checked out of the library for months). It was hard to get through because, while sadly on target (no pun intended) with its step by step instructions, it was so depressing and also at a level of detail that left me realizing I likely wouldn't be able to remember everything in order to save myself. And, aside from perhaps reminding my clients to have drills in relation to such active-shooter events (which the book doesn't actually talk about from that perspective), I didn't find myself taking many notes. That said, if you are looking for very specific actions to take during such an event and feel you will remember all the gory (again, no pun intended) details of the instructions, then this book will help you.

Personally Yours



It's starting to stick...

You might think from the title above that I am referring to the snow, and that might well be true, but in fact, I am referring to my December tradition that involves sticky notes.

Each December, I place a marker and a sticky note pad at the end of my home office desk near the door. Whenever I think of something I would like to do the coming year, whether it be personal or professional, I jot it down and stick the note on the blank wall across from my desk.

By the last week of December, the wall is full of ideas. From there, I take them down and start putting them back up in clusters—seeing what ideas have common themes or may be sub-sets of each other. From there, I whittle them down into just a couple in each category, using the four categories in my diagram to the left. Lastly, I write the finalized goals in SMART format in my Bulletjournal for the coming year.

If this sounds good to you, give it a try! And, maybe, just maybe, the ideas, and the technique will *stick* with you, too!

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- Speaking and training in planning and business management
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- Customized market research and competitive intelligence analysis
- Strategic facilitation of the planning process
- Board retreat facilitation

This newsletter is intended to provide useful information but should not be construed as legal or financial fact, advice, or opinion.

Coming in December...

- * **Project Selection: a Checklist**
- * **Book discussion of Be the Hero: Three Powerful Ways to Overcome Challenges in Work and Life, by Noah Blumenthal, 2012, Berrett-Koehler Publishers, Inc.**
- * **And more!**



Have an idea or comment to share? Have a topic suggestion or planning question? Send it in! I would love to hear from you!

Be My Guest/Reader Feature

Have a planning success or horror story? Have some tips for others? I would love to feature you. If you are interested in being included in a future newsletter, let me know if you would like to write a guest column or be interviewed.

UPCOMING TRAINING & SPEAKING EVENTS

- * **12/03/18-12/04/18: Developing a Winning Business Plan, NeighborWorks® America, Pittsburgh, PA, www.neighborworks.org.**
- * **02/04/19-02/05/19: Strategic Thinking, American Management Association, Dallas, TX, register at www.amanet.org.**
- * **02/07/19-02/08/19: Critical Thinking, American Management Association, Chicago, IL register at www.amanet.org.**
- * **02/11/19-05/13/18: Organizational Behavior (online), College of DuPage, register at www.cod.edu.**
- * **03/19/19-05/07/19: Leadership (hybrid, Tuesday night class), College of Dupage, register at www.cod.edu.**
- * **02/21/19-02/22/19: Strategic Thinking, American Management Association, Chicago, IL, register at www.amanet.org.**
- * **02/25/19-02/26/19: Critical Thinking, American Management Association, Lake Buena Vista, FL, register at www.amanet.org.**

Email me for details!