



How to Raise Your Planning IQ

By Richard Martin

Many brilliant strategies founder in the execution. However, there is an effective way to maximize the chances of success in implementing strategy by raising your “planning IQ.” Whenever there is a need to implement a new strategy or intent, or even if confronted with a novel situation, it is always best to take some time to conduct a planning assessment. This can be done deliberately or hastily, formally or informally, individually or by a team. The important thing is to have a method that ensures you are considering all the likely scenarios and courses of action to achieve your goals. The following steps provide a template that can be applied to just about any situation and that ensures your plans will be well considered.

1. Determine the aim: What are you trying to achieve?

This is the key step. How often do we set out to create a plan, only to realize half way through that we’ve been pursuing the wrong aim? This can lead to confusion in yourself and your team. Also, by stating the aim clearly at the start of planning, you will minimize the chances of conflict and resistance over objectives. It also helps to focus the mind like a laser beam on the problem or issue at hand.

2. Make your assumptions explicit.

This is the most frequently overlooked step in problem-solving and planning. Failure to be explicit about assumptions often leads to confusion and conflict. It can give the impression that there is a hidden agenda – when there really isn’t one – or that the leadership is ill-prepared for the change. Many of us aren’t aware that all thinking takes place in a context of pre-existing knowledge, assumptions, and presuppositions. While it is probably impossible to list all of the assumptions at the outset of planning, it is nonetheless critical to question one’s thinking as the analysis proceeds. This usually reveals fundamental assumptions which can then be explicitly listed. If conditions change and an assumption proves to have been wrong, it then becomes relatively easy to adjust the option analysis or plan.

3. Determine the decision framework: What are the factors to be considered?

This is to ensure that the situation and the courses of action under consideration are examined from all relevant standpoints. At this stage, it is important to be as inclusive as possible in identifying factors. One method is to list all the factors that are readily apparent and then to brainstorm for those that are less so. Do not try to be prescriptive or restrictive in this. Once the list is generated, items can be grouped to produce a pared down listing of the most relevant factors. Moreover, as the analysis proceeds and generates further insights into the workings of the issue, factors can be added.

4. What are the limitations on freedom of action?

Can any solution or course of action be considered or are there any no-go areas? Conversely, are there things that must be done in order for the plan to be considered valid? Identify those things that must not be done; these are the restraints. Identify those things that must be done; these are the constraints. These become part of the decision framework. This doesn’t mean that you shouldn’t consider courses of action that contradict any of the limitations, though. If there are grounds to do so, this can provide ammunition to deal with the objections that will be raised.

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5. Consider a variety of scenarios.

Before generating courses of action, it is critical to identify and categorize what might happen as the situation evolves over time. This may require a certain level of forecasting and prediction. Alternatively, it may just be enough to consider the most likely and the most disruptive scenarios. The important thing is to use your imagination to identify potentially unpleasant outcomes or, conversely, unexpected successes. Being prepared for success is just as critical as being prepared for adversity.

6. Generate courses of action.

At the very least there should be a course of action to address each of the most likely and the most disruptive scenarios. Additionally, there should be a course of action to address the likelihood of unmitigated success (see previous step). Various techniques can be used to generate courses of action. Brainstorming and mind mapping are just some of the examples of ways of “thinking outside the box.” Solutions to problems and options for improving performance often come out of the most unexpected areas. Metaphors and analogies can provide fodder for creative problem-solving and planning. Reviewing approaches that have been successful elsewhere, even if the circumstances are different, can also offer clues to how you should proceed.

7. Analyze the courses of action.

Each course of action should be analyzed in terms of the factors, constraints and restraints, and rated as a means of addressing the various scenarios. When doing so, the best means is to look at the factor for a particular course of action and ask repeatedly, “So what?” or “Why?”, until you have exhausted all possibilities. This process of generating deductions from initial premises and observations creates a well balanced view of any particular option. It also leads to the identification of resource implications, timing, effectiveness, and relevance to the overall aim, all of which will contribute to the final decision and the eventual plan.

8. Compare and decide on a course of action.

There must be some form of comparison between options. Some favor quantitative methods while others favor qualitative methods. Sometimes a mix of methods is required. For most purposes, a simple identification of relative advantages and disadvantages of each option is the best and fastest means of comparison. Factors can be weighted to reflect their relative criticality or importance for the achievement of the aim. The best – or optimal – course of action should be relatively obvious at that point. If not, all but the top two should be discarded and then these should be compared again, after which the best one can be selected for planning.

9. Create the plan.

After all that analysis and comparison, the plan should flow easily from the selection of the optimal course of action. Just take the selected course of action from the preceding analysis and build your plan from that. The deductions from the factor analysis will likely provide most of the objectives, tasks, resources and milestones, and these can then be assigned to team members with a view to executing the plan.

Planning need not be complicated. The important thing to remember is that your first thoughts on an issue are not necessarily your best thoughts. Taking time to consider the aim, assumptions, limitations, factors and various courses of action is rarely wasted. Involving others in the analysis is often a very good way to get buy in from your team and will always provide better ideas than one person working alone. The only exception to this approach is during a crisis, but even then, time spent in consideration of options is usually well spent.

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