



We Help You Focus Clearly,
Organize Effectively,
And Act With Courage

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Tips for Better Planning Sessions

- **Build reflection time into the planning schedule.** Where possible, I now schedule a one day planning session in two half days -- the afternoon of day one and the morning of day two. This provides better results with the same amount of time, because participants have more energy and can make better commitments when they can “sleep on” something overnight.
- **Tell people how to prepare and what to expect.** You’ll get better results if people don’t come in “cold.” Tell people what they need to read, think about, write, or bring to make the session productive. Then take time at the beginning of the session to review the expectations and set ground rules.
- **Evaluate and learn from the experience.** I usually schedule a “checkout” for 15-20 minutes as the final activity before a group adjourns for the day. People have an opportunity to assess their work, the value of the day and where they are going next. My experience is that the group improves its own process and self-discipline as a result.
- **Get meeting notes out within 5 business days.** This may seem like a “no-brainer,” but it is very rarely done! However, with people so busy these days, they may be off in new directions if it takes more than a week to get meeting notes!

Action Calendaring

By Cathy Perme

Have you ever wanted to find a *quick* way to create an action plan with a team? I have found the typical process both boring and onerous, at best eliciting lukewarm results along with deep sighs. I have developed a way to create a comprehensive, near-term action plan in less than two hours, even with complex projects. I call it *Action Calendaring*. I find that it energizes a group and creates greater ownership for actual implementation.

Materials & Set-Up

- 4-5 different colors of 2”x2” self-stick notes (like 3M’s “Post-It” brand)
- Markers, one per person
- The next 3-4 months mapped on flipcharts, one month per page, and posted on the wall. (Note: the calendar should be large enough that each date is 3”x3”.)

Process

1. With the group, identify the four to five major themes or areas that need to be addressed and list them on a flipchart.
2. Invite team members to *follow their passion* and self-organize into subgroups to flesh out each of these areas.
3. Give each subgroup a different color pad of self-stick notes and ask them to brainstorm the work tasks involved to make their part happen. Instruct them to write one task per note, and not to worry about the sequence at this point. This should take about 20 minutes to complete.
4. When a subgroup has completed its brainstorming, instruct them to move to the calendar and post each task onto the ideal or suggested “by when” date. Tell participants to write their names on the tasks for which they will be responsible. If a task needs to be done by the larger team, such as a decision, the subgroup will write “team” on the task and post it on a regular meeting date. It will also suggest the decision-making style for that item. (ex. majority, consensus, etc.)
5. Once all subgroups have completed brainstorming and posting, the whole team moves to the calendar and examines the work and work load chronologically. Work to provide each other feedback and identify links and gaps. Suggest looking for periods of heavy activity that may need to be smoothed out, or links between tasks that need to be sequenced.
6. Once the calendar is adjusted, make sure that every task has a person named as responsible and that team agreements for decision-making are clear.
7. When the calendar is finally done, you can simply type up the action plan based on the color-coded notes, which identify what action is to be taken, by whom, and by when. Most teams keep the calendar posted for ready reference.