

### TRG LEADERSHIP TOOL

#### "Practical Means for Dealing with Difficult Times"

On an ongoing basis, this section of our site will feature business tools and planning considerations designed to assist leaders for whom "just keeping up" is not good enough. These notes will focus on sequences of thought and action intended to enhance the positioning for your group, both on a long and short-term basis.

Please check back frequently to review the next tool. Visit our [LEADERSHIP TOOLS ARCHIVE](#) for previous tools.

### BUILDING CONSENSUS PART 2

The best consensus-based plans are proposed by those who are responsible for conducting the component parts of the plan and approved by whoever has the final responsibility for overall results. Since a plan which nobody follows is a worthless plan, the planning process should assure active cooperation by asking the managers of the plan if what is said actually represents what they intend to do.

At the start of the planning sequence it is important to establish ground rules for the planning process.

#### GROUND RULES

A sequence can only be effective as the willingness of those following it to adhere to a set of principles by which it will be run. Ground rules for how a planning sequence is to be executed should be established at the initiation of the planning effort. Some key concepts include:

- Designation of the planning team and the team facilitator (either from within the group or one from the outside) who will run the process from end to end
- Development of a planning process Agenda and schedule (remember to write everything down and to refer to the planning agenda at each step!)
- Ask ALL of the questions about:
  - What and where we are?
  - What and where do we want to be?
  - What is between now and then, here and there?
- For every barrier select a solution; for every destination select a course and remember:
  - If you have no solutions, then make the search for a solution a part of the first objective
  - Never assume that something will happen that does not have a person's name and a timeframe attached to it

Once ground rules have been established and understood by all those involved, work on the planning sequence should begin.

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## THE PLANNING SEQUENCE

A successful and effective plan follows a sequence of Elements designed to ensure each item is not only owned, but that progress is reported and that it is completed. Each planning sequence includes several phases, these include:

PHASE 1 - INITIATION: Clarify the planning effort and outcome

PHASE 2 - ASSESSMENT: Analyze the current environment and select the plan (outcome) formats

PHASE 3 - DEVELOPMENT: Draft the principal direction

PHASE 4 - CONSENSUS: Develop strategies that involve the plan "owners"

PHASE 5 - IMPLEMENTATION: Assure that plan will be accomplished

PHASE 6 - REVIEW / RE-INITIATION: Restart the process after a pre-designated period of time

## DETAILING OF THE PLANNING SEQUENCE

Each Phase of the planning sequence comes with additional considerations that must be regarded during each step of the process.

### PHASE 1 - INITIATION

The purpose of the Initiation Phase is to:

- Clarify the tasks at hand and if possibly, in order of priority
- Organize the planning effort
- Identify the outcome sought by the group

Action steps to be followed:

- Define the nature of the result to be sought through the planning effort, this includes:
  - Determine the type of plan (or other outcome)
  - Clarify the aspects of the group's activities that are to be planned
  - Establish the length of time that the plan will cover
- Define the relationship between the planning team and both the rest of the group and the ongoing planning effort
- Selection of the planning team
- Determine both planning facilitation and planning management methods
  - Select a facilitator
  - Develop a list of issues related to the planning effort
  - Distribute planning tasks

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- Documentation
- Scheduling and communications
- Facilities
- Set the Agenda for the planning process
- Establish and communicate a planning schedule

### PHASE 2 - ASSESSMENT

The purpose of the Assessment Phase is to:

- Assess the group and the environment
- Determine the Planning or Outcome Model to be used

Action steps to be followed include

- Conducting current assessment research that includes:
  - Determining business case criteria to be followed throughout the planning effort, remember to answer the questions:
    - What is the measure of success?
    - How is it verified?
  - An internal review of the group/organization, remember to answer the questions:
    - What is the purpose for the group's existence?
    - Who was the group formed to support and what do they need?
    - Who was the group formed to influence and in what way?
    - What distinguishes the group from any other with a similar purpose?
  - A look at the Business environment to clarify what are the current business conditions under which the group operates
- Present assessment to the larger or full group for response
- Incorporate the feedback into the assessment
- Review the formats of plans (or other outcomes) to:
  - Assess the span of individual availability and resource
  - Review the preliminary range of priorities to be developed
- Select the initial plan (or result) format

### PHASE 3 - DEVELOPMENT

The purpose of the Development Phase is to:

- Determine the Mission and Vision of the group/organization
- Select the principle direction to be followed over the course of the life of the plan
- Draft the preliminary plan to the level of goals and objectives desired

Action steps to be followed include:

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- Conducting development session(s) in order to answer the following questions:
  - Who do we support and influence in what way?
  - What qualities and attributes currently distinguish our group?
  - What do we know about the business environment in the future?
  - How will the need for support and influence change?
  - What will distinguish our group in the future?
  - What will be the means to and measure of our success?
- Draft and Present the Mission and Vision to a larger or full group for response
- Incorporate the feedback into the process of redrafting
- Select Goals from the within the Mission and Vision result
- Conduct a development session(s) in order to draft the measurable Objectives

### PHASE 4 - CONSENSUS

The purpose of the Consensus Phase is to:

- Develop the Strategies and short term Initiatives
- Assure the acceptance of the plan by the larger group

Action steps to be followed include:

- Select Objective owners
- Establish timeframe for initiatives
- Conduct sub-group development of proposed strategies and initiatives
- Communication of the draft strategies by the objective owners
- Incorporate the feedback of the group
- Communicate the final result

### PHASE 5 - IMPLEMENTATION

The purpose of the Implementation Phase is to:

- Assure that the plan will be maintained

Action steps to be followed include:

- Establishing a rolling tactical process that includes:
  - A set agenda
  - A formalized plan owners/management team
  - A set planning and review cycle with:
    - Development meetings
    - Tactical review
    - Strategic review

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- Plan management with communicated results

### PHASE 6 - REVIEW / RE-INITIATION

The purpose of the Review/Re-initiation Phase is to:

- Restart the process after a pre-designated period of time

Plans are meant to be living documents that are carefully followed and executed. Action steps to be followed during the life of the plan include:

- Quarterly reviews of goals and objectives that include progress reports
- Annual plan review with the full planning team to determine what goals or objectives in the plan should be adjusted or discarded going forward
- Re-initiation of the planning process upon successful completion and implementation of the previously developed strategic plan

### THE REALITY TEST

The "reality test" is to be applied to strategies, principles or initiatives. The test enables the group to determine how practical and feasible to accomplish an element of the plan may be. A few factors to consider when conducting the reality test include:

INTENTION: Is the result what the group actually intends to do?

PRACTICALITY: Do we understand the effect/results of this principle or action?

Do we understand the resources required to adopt this principle or action?

COMMITMENT: Is the appropriate level of authority committed to this principle or action?

CONFIRMATION: Is this STILL what we actually intend to do?

Once the reality test has been successfully completed and each question answered with a consensus it is important to conduct the next test: the completion test.

### THE COMPLETION TEST

The "completion test" is to be applied to initiatives and actions. The test serves as a final wrap-up to those goals, objectives, and strategies established by the group and determines whether they have been satisfactorily reached or if work on them is still necessary. Some things to consider when performing a completion test include:

- Have we stated everything that we actually intend to do?
- Are there parallel actions being undertaken which have been left unstated?

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- For every action stated is there:
  - An "owner"?
  - A schedule of completion?
  - A commitment to report result?
  - An agreement as to who will review the report?
  - A schedule for the review?

For additional information regarding Building Consensus, please visit our [Contact Page](#) and send us an Email or simply call us directly during East Coast business hours on our toll free number 1.800.97-REGIS (1.800.977.3447).