



“Proper Planning Prevents Poor Performance”



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Most often, toward the latter part of the summer, many businesses begin to look at their business positions and initiate some degree of focus on ending the year successfully and thinking about planning for the New Year. The challenge becomes in the harsh reality that most businesses simply do not plan or they do not plan effectively. That fact finds itself true in that one can not effectively build a business without a viable, workable, applicable business plan. The success comes in knowing what constitutes a winning plan and then what must be done to insure that the plan brings the results that are needed. So, what is required for a “winning plan” to be developed; and, what must be done to insure that the plan has an opportunity to achieve the results the framer intended?

First, let’s take a look at the nature of planning in a general sense. A winning plan gives the individual or company a clear picture of where they are and where they are going. It provides insight into whether or not an action, a market, or a particular focus might hold validity. It allows for the individual or company to be able to understand what they are building; why it is being built; what will be measured; how will the results enable the company to continue to grow and develop; and, what specific actions must be taken and by whom if the plan is to be successful. In essence it is a credible assembly of vision, mission, objectives, strategies and action plans. Though these descriptors are not necessarily a new understanding to those in business, however these simple categories carry the very life breathe of business success or shortfall. Even baseball’s Hall of Fame and New York Yankee’s legendary player Yogi Berra knew about its value when he said, “If you don’t know where you’re going, you could wind up someplace else.” Understanding the framework of planning first at least insures that you will begin on the right road toward your goals.

Next, it is important for you to break down thoroughly the categories of vision, mission, objectives, strategies and action plans so that you fully understand what they are and what they are not. As the lady once remarked to her friend about her son, “Larry has all the ingredients for success but he has never been able to find a suitable recipe.” A winning plan complete with vision, mission, objectives, strategies and actions plans is a suitable recipe for success. Therefore insuring that “suitable recipe” has all the proper ingredients to reach the success you seek must be your focus. Let’s explore these areas individually.

Vision simply describes what is being built. It should clearly define who you are; what or who do you serve; where are you serving; who are your customers; discuss the products and or services you offer; and, what goals are you seeking. Those goals can be sales, or achievement levels as an example but must be measurable. It is also important for clarity that you add some form of timeline to the vision so that it can be better measured as time develops. Whether that be a year, or three years or even a greater period of time, setting this time awareness actually builds in accountability toward the reality of what you are attempting to build. Thus, before you build that winning plan, you really have to know and others need to see, what you are building and planning for.

Mission is a demanding area. It is often confused with vision which creates even more difficulty, In its basic sense, it defines why a business exists. It should not be a paragraph

long or even multiple sentences. It should get to the point and do so in eight to twelve words or less. A winning mission statement will utilize insights into your customers needs, your promise and what you are known for. It can also have a position that notes our competitive advantage. For example: a lawn and carpet maintenance company may have as its mission, "We help bring green and clean to your home or business." They are defining their market, the home and commercial area; talk about what they do, bringing beautiful green to the grass, etc. and insuring that carpets are clean and fresh in homes and businesses as well. Simple, to the point and it resonates with those who view it. No rambling of "wanna be's" but clear impactful reality of why the business exists.

Objectives are great guidelines for the present and future. They are not always easy to formulate but are very, very important. Even the philosopher Aristotle noted, "The way to achieve success is first to have a definite, clear, practical ideal—a goal, an objective..." Business guru Peter Drucker also proclaimed: "Objectives are the 'instrument panel' necessary to pilot the business enterprise. Without them management flies by the 'seat of its pants'—without landmarks to steer by, without maps and without having flown the route before..." Objectives must define what will be measured and also they must be metric based simply meaning they can be compiled as in a scoreboard. Objectives provide accountability; relate targets to shoot for; greatly reduce subjectivity, and input objectivity focused on specific results; and, provide detectable measures to gauge whether you are winning or are falling short. They are powerful, need to be formulated carefully and must be convincing to justify overall commitment.

Strategies are similar to roadmaps: they set a direction for the business to follow. They also should provide a basis for key decisions to be reached and reflect what is actually being done by the business. Further they should provide illustrations on how the business or area might differentiate itself in the marketplace and have a bearing on such constants as culture, leadership and key sources of income. Strategies also clearly state what a particular business will address and also what it might avoid. As a result of the activity strategies, the business leader can also formulate key business practices and create a viable business model that can be duplicated. As former GE CEO and author Jack Welch notes, "A strategy is something like, an innovative new product; globalization; taking your products around the world; be the low-cost producer. A strategy is something you can touch; you can motivate people with; be number one and number two in every business. You can energize people around the message." Strategies in essence help explain how the business will succeed over time.

WWII General George S. Patton said, "Opportunities do not come to those who wait. They are captured by those who attack." Action plans specify what exactly must be done. They address projects that will be utilized; who is responsible to perform various actions; what is the timeline for the work to be completed; and, what are the results you want to achieve with your work. Action plans pull in the vision, mission, objectives and strategies and compile each part so that workable processes bring these areas to life. There is an old saying that notes, "...where the rubber meets the road..." and action plans definitely fulfill this analogy. One can work and build great vision, a formidable mission and clear objectives and strategies. However unless powerful action plans are developed and then enacted upon, the plan will fail to launch.

Third, a winning plan must be a true commitment. Realities regretfully show that many great plans end up as either doorstops or bird cage coverings because the framer(s) were not fully committed to the plan. Plans are too often prepared because it was a “have to” to meet some particular guideline; and, they did not clearly see it as a vital part of their success. Past experience has shown me that there are basically four types of planners: 1) Headers: who feel the best plans and goals are those existing only in their subconscious; 2) Workers: those who feel the premise of building the plan is more vital than what is actually contained in the plan; 3) Believers: those who truly understand the value of planning, but don’t fully understand how to do it; and, 4) Planners: those who build and follow a winning plan and strive to always improve their expertise in planning. To more fully understand the commitment of planning, let’s briefly examine these four planning types.

Headers are not necessarily poor business people. Simply they dislike anything that necessarily confines them to specifics. They work off the short changed strategy of “hope.” Hope in itself is regretfully not a winning strategy if a strategy at all in the business sense. Headers enjoy the “rush” of being under deadlines and having to hustle to attempt to meet particular goals. If they fall short, it appears that it does not matter. Since nothing was written down, nothing is really at risk. They justify the shortfall because they tell themselves, “Well, it was something I really “hoped” to accomplish. There is always next year.” The challenge comes that those shortfalls too often build upon each other and before it is fully realized, they are retiring and have not achieved to their potential. Their lack of commitment often also relates to an un-compromised ego where they feel their way is the best and only way. Thus listening to others or exploring best practices is not a function of their being. To undergo change would be a detriment to their perceived status. Though some headers are reasonably successful, few if any ever reach their potential levels in business or life. Their lack of change commitment and dedication to their ego of always being right becomes the immovable mountain which controls their life.

Workers are a unique group. They really get into the planning dynamics and are so consumed by the process that they fail to address what the process is trying to really accomplish. Their idea of planning is based on the “weight” of the plan, not the content. In their plans you will find mentions or thoroughly prepared analysis of the most industry sensitive techniques of action whether or not those techniques are truly applicable to their business marketplace. They are interested in insuring their plans reflect the supposed “in thing” so that those superior to them in rank will notice and they can then put another “notch” in their resume for possible advancement. Their goal is the next step not the current need. The plan has actually become one of the conduits they use to display their knowledge and work. Too often plans developed by this group becomes so complex and so detailed that even the most educational advanced individual can not keep track of priorities, or action plans. Further, follow up and accountability becomes less and less as months go on because the Worker has changed focus to the next best project. In finale analysis, the ten pound plan in the beautifully crafted binder and the color coordinated tabs complete with a CD of the Worker discussing the plan become yet another monument to failed achieved blamed upon those charged to carry forth the plan.

Believers want to plan and try to plan but simply are not certain how to plan. They often throw something together on the very last day and do so in a very short timeframe without a great

deal of thought. They regularly get their vision and mission confused and strategies and action plans are considered the same. They have regularly written down some goals utilizing everything from a sheet of blank paper to readily supplied company templates; but, they still struggle with how to make the plan come to life. Believers lack the overall self-confidence and fear critical accountability necessary to effectively plan as they should. When the plans are complete, though following the guidelines, their positions, goals, etc., have valuable “holes” in them which normally allows the great goals, strategies, actions, all vital to success to “seep out” before they have time to materialize. Struggling throughout the year with meeting expectations and secretly blaming themselves, too often they allow year after year to pass without seeking the assistance they need to build the plan they deserve. Getting the Believers to move forward is difficult but rewarding once the decision is made. In turn, these devotees can become excellent ambassadors for the value of planning when they finally comprehend the process and utilize its benefits.

The Planners realize the planning value in virtually any undertaking. They devote the time necessary to “think on their business” and build viable winning plans that keeps them active but not bogged down “in” their business. Their mission and vision is crystal clear. Their objectives, strategies and actions plans are built so that the novice can review their plan and understand what is going on in the business. They hold themselves accountable and regularly review scorecards to ascertain results. Actions are debriefed sometimes to a fault as the Believers examine what worked, what didn’t and what can be done. They do what is necessary to keep them going in the right direction. Planners also understand that changes in business environment means flexibility is a regular part of a winning plan. They have no issues in making corrections when the path followed begins to lead to “dead ends.” Planners thus accomplish virtually every goal to its maximum or to such a degree that it positively impacts their business year. They build each year upon the other but also keep alert as to how their plans may be altered to insure even greater clarity and more effective delivery. As students of planning and the results that can come forth, Planners strive for excellence each day and infect others with their valuable business insights. Their mantra is simple: “Planning works!”

Fourth, a winning plan must be sellable. You understand what a winning plan is and isn’t. You have an understanding of what should be contained in the plan and that you must be committed to the plan. Now comes the time that the plan must be sold to affected parties. Being “sellable” simply implies that the plan can be understood; provides a clear picture of intent; and, the party clearly sees their role in the process and the benefit of the plan’s outcome. Working feverishly on a plan and thinking that you have hit the “home run” with its final version is only a part of the battle. This is where inclusion in the initial process may be vital to the developer. Gaining input and challenging affected parties to think beyond their safety net in adding to the composition of the winning plan will certainly carry you further down the road to ultimate success. When everyone can see their handiwork in the process and then how they impact the outcomes, it is virtually certain interest, support and greater execution will bring better results. The influence of the plan owner is thus crucial in this area. Where there is influence, there is leadership. Where there is leadership there is focus and vision. Where there is focus and vision, there is commitment. Where there is commitment, there is the greater potential for success.

Fifth, a winning plan must have flexibility. Rigidity can be good when dealing with stabilizing new trees or building skyscrapers but it will fall short when you are building winning business plans. In order to meet changing customer demands, address marketplace shortfalls or advance unexpected windfalls, your business plan must allow you the leeway to alter its process to meet the changes you could face. Author David W. Jones points out, "Planning is helpful. If you don't know what you want, you'll seldom get it. But, no matter how well you plan, you will fare better if you expect the unexpected. The unexpected, by nature, comes unseen, unthought, un-envisioned. All you can do is plan to go unplanned, prepare to be unprepared, make going with the flow part of your agenda, for the most successful among us envision, plan, and prepare, but cast all aside as needed, while those who are unable to go with the flow often suffer, if they survive." When you fail to be flexible in planning, you will indeed be planning to fail. This does not mean that you should not be sold on your goals, etc., to the contrary, that is the essence of what planning entails. However, having flexibility as a component allows you to insure even greater potential for the plan to succeed since you are not limited in your actions. As has been said, "The key to sustained happiness, health, and longevity is flexibility."

Sixth, a winning plan must be accountable., Accountability is key to making virtually any undertaking have purpose. Famed business guru Stephen Covey once said, "Accountability breeds responsibility." Winning business plans are similar: there is a responsibility of accountability for it to have the impact its content intended. The accountability comes from the actions plans and target dates winning plans contain. Further, having specific individuals designated to carry out various plans provides clarity of duty and overall responsibility that winning plans must have to succeed. Periodic updates regarding how the plan is doing will insure that all impacted parties remain active in the process. "Being in the game" at all times provides the elements of accountability that is critical to the winning plan's success. So, does accountability really matter? Explore this example and decide: There once were four people named Everybody, Somebody, Anybody, and Nobody. An important job had to be done, and Everybody was sure that Somebody would do it. Anybody could have done it, but Nobody did it. Somebody got angry about that, because it was Everybody's job. Everybody thought Anybody could do it and that Somebody would do it. But Nobody realized that Everybody thought Somebody would do it. It ended up that Everybody blamed Somebody when Nobody did what Anybody could have done. Winning plans to be successful must have the accountability of action and responsibility of duty to insure success.

Finally, a winning plan must be sustainable. Its viability is built upon year after year to better enable best practices as well as learning moments to be experienced. It cannot be necessarily forced but does demand full concentration and commitment. It also commands self-discipline on the part of the participants and a tough-mindedness that helps avoid pitfalls that can derail even the most utopian built plan. Tom Landry was the legendary coach of the NFL's Dallas Cowboys. When he arrived in Dallas as its first head coach in 1960, he put together a multi-year plan for the Cowboys to become champions. His first year of 0 wins, 11 losses and 1 tie was tough for the fans and owners as well as the team; but, with each passing year, he continue to build upon his plans and insert improvements that enabled the team to gain success. In 1966 Coach Landry led the Cowboys into the championship game though they lost to the Green Bay Packers. His sustainability of effort and building upon his plans year after

year brought championships to the Cowboys to the point they became America's team. His 29 years with the Cowboys and 20 consecutive winning seasons are records that stand today. Winning plans win when sustainability is evident in their evolution and execution. Building on insights gained year after year brings value, knowledge and confidence that planning can and does work when the pieces fit together.

Proper planning does prevent poor performance. Planning does matter. It keeps us going in the right direction. You cannot successfully build a business without a plan. It gives a reason for doing what you do. As Victor Hugo once said, "He who every morning plans the transactions of the day, and follows out that plan, carries a thread that will guide him through the labyrinth of the most busy life." Just as the Cheshire Cat told Alice as she approached a fork in the road in Wonderland and asked which way she should go, "If you have no idea of the destination you seek, what does it matter?" Planning makes a difference. When you understand what makes a winning plan work, and realize its value to your business and you personally; then, you can plan properly and gain the success you deserve.