



# ACTIVE PLANNING

## beginning with the end in mind

*"Planning is an unnatural process – it's much more fun to get on with it. The real benefit of not planning is that failure comes as a complete surprise and is not preceded by months of worry!"* **Anonymous 2000**

Any programme of work, particularly one relating to a change in an organisation, needs a plan that everyone can follow. Plans can either be created:

- **Left to Right** - focusing on the activities that need to occur, *or*
- **Right to Left** - focusing on the required deliverables

(A 'deliverable' is a tangible item that can be completed - and can be seen to be complete – such as 'first issue of newsletter published', 'roles and responsibilities defined', or 'new measures in use'.)

Inspired Partners always follow the **right to left** approach, focusing on the end goals and being flexible as to how they are reached. We involve as many of the change team as we can in the planning process so that they have a shared understanding and ownership of the plan. This is the process we use:

- **Identify the deliverables**

Establish the main deliverables that are required to achieve the desired end result or change.

- **Allocate owners**

Group the deliverables into workstreams and assign each to a member of the change team. It is important that workstream owners truly own their deliverables as they need to take responsibility for the next two steps in the process.



# ACTIVE PLANNING

## beginning with the end in mind

- **Set stepping stones**

Identify interim deliverables for each workstream to provide stepping stones towards the desired end result. These make it easy to check progress and are good morale boosters for the team.

- **Analyse inputs and outputs**

To achieve their deliverables - or outputs - the team will require inputs which may or may not exist. The workstream owners must identify the inputs they require, so that they can determine the activities necessary to transform those inputs into outputs. Often this stage creates additional interim milestones.

- **Share the information**

Once all the workstream owners have established how they will achieve their deliverables, they must share the information with each other in a group working session to create a single, integrated plan. This plan must then be prominently displayed where everyone can see it.

### Sharing Understanding through Visual Display

Inspired Partners achieve shared understanding through **post-it planning** (also called 'brown paper planning'). This visual technique makes the plan clear and easily accessible to everyone who is involved in or who may be affected by the change. It also ensures that the plan remains a tool to assist in the delivery of the project and does not become an end in its own right.

Basically, a post-it plan involves sticking post-it notes onto a large sheet of brown paper, which is mounted prominently on a wall where everyone can see it. The paper is marked up into weeks across the horizontal and workstreams down the vertical. Every workstream owner writes down each activity needed to achieve their deliverables on a single post-it and sticks it on the grid.



# ACTIVE PLANNING

## beginning with the end in mind

Building the plan in this way:

- creates a common understanding of the whole plan, not just of isolated aspects
- shows up any dependencies and/or conflicts between workstreams so that you can address issues and set priorities
- provides a 'sanity check' for each workstream owner, placing their ideas in the context of the wider group
- reveals whether all the planned activities are truly feasible given the available resources and any other constraints
- enables risks to be identified and 'out of scope' activities removed

The plan should be reviewed weekly so that it can be 'quality checked' in action and any changes made as soon as they are identified. It is also very motivating for the team to mark off every activity or deliverable achieved to show progress against the plan. All workstream owners should be involved in each review so that they maintain a good understanding of how their work fits into delivery of the overall plan.

The typical duration for a change programme post-it plan is three months. If the programme needs to run for any longer then more than one post-it plan will be required, although the end deliverables will remain constant. Whatever the duration, we would always revisit the full plan at mid-point to check that everything is still on target for the desired end result.





# ACTIVE PLANNING

## beginning with the end in mind

### Tips for Better Post-it Planning

- Make sure there is only one activity per post-it so that it can easily be recognised when it is complete.
- Ensure each activity can be easily understood by several people and that it passes the 'still understandable in 24 hours' rule.
- Use different shaped post-its to illustrate specific types of activities, deliverables and meetings, so that people can see immediately what is happening in any week.
- Use 'completion' and 'progress' markings so that it is easy to see real progress being made, and to identify when it is not.
- Use good and sticky post-it notes, as they need to stay on the wall for up to three months!

*"If you fail to plan you plan to fail ... Begin with the end in mind"* **Stephen Covey**