

The Planning Process

I. PROJECT ASSIGNMENT

A. Initial Assessment

1. Implied Tasks
2. Essential Tasks
3. Specific Tasks
4. Constraints
5. Objective Statement
 - a. Tool #1
 1. Objective
 2. Competition
 3. Time Available
 4. Assets Available
 5. Physical Environment
 - b. Tool #2
 1. Visualize
 2. Describe
 3. Direct
 - c. Tool #3
 1. Assess
 2. Decide
 3. Direct

B. Reverse Planning Process

1. Execution Phase
2. Preparation Phase (2/3 of the time available)
3. Planning Phase (1/3 of the time available)

II. ASSEMBLE THE TEAM

- A. Tell your team everything you know
- B. Select additional members and inform them

III. MAKE A TENTATIVE PLAN

- A. Analyze the project you have been assigned
 - 1. Identify difficulties (may be quite subjective)
 - 2. Identify contradictions in the assignment
 - 3. Request clarifications from your superiors
 - 4. Obtain additional information from your superiors
- B. Develop potential courses of action
 - 1. Suitable
 - 2. Feasible
 - 3. Acceptable
 - 4. Unique
 - 5. Complete
 - 6. Sustainable
- C. Analyze the potential courses of action
- D. Compare the potential courses of action
- E. Select the course of action you will use to complete your plan

IV. INITIATE MOVEMENT

- A. Begin completing tasks if you haven't already
- B. Start research if you haven't already
- C. Delegate Authority

V. OBTAIN INFORMATION

- A. Answer Information Requirements (confirm or deny)
- B. Obtain all First Hand Information Possible

VI. COMPLETE THE PLAN

- A. Refine task list
- B. Refine constraints
- C. Select the final course of action

VII. INFORM THE TEAM

- A. Insure everyone understands the concept
- B. Delegate final tasks

VIII. SUPERVISE

- A. Avoid making work
- B. Maintain flexibility
- C. Expect that there will be unexpected events

EXECUTE

STEP 1

PLANNING WORKSHEET – DATE & TIME: _____

PROJECT TO BE PLANNED

TASK LIST

<u>IMPLIED TASKS</u>	<u>ESSENTIAL TASKS</u>	<u>SPECIFIC TASKS</u>	<u>CONSTRAINTS</u>

OBJECTIVE STATEMENT

INFORMATION REQUIREMENTS:

CONDENSED TIMELINE

DEADLINE TO EXECUTE PLAN: _____

BEGIN PREPARATION PHASE

(2/3 OF TIME AVAILABLE):

FINALIZE PLAN (1/3 OF TIME AVAILABLE):

DATE TIME PLAN ASSIGNED:

FINAL PLAN

DATE & TIME: _____

OBJECTIVE STATEMENT

CONCEPT OF THE OBJECTIVE:

IMPLIED TASK LIST:

ESSENTIAL TASK LIST:

SPECIFIC TASK LIST:

CONSTRAINTS: