DISCOVER FOR YOURSELF

A Breakthrough in

STRATEGIC PLANNING

ACTIONABLE AND ACCOUNTABLE

RON TABACHNICK

A BREAKTHROUGH in STRATEGIC PLANNING

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Honoring the wonderful memory of my dear dear cousin Rossi Gilman (nee Brown)



Patricia,
if it wasn't for you, my dream of writing this
book would have never happened.

I want to thank you for your professionalism, your time, your effort, and your passion to bring to life

A Breakthrough in Strategic Planning.

NOTE: To get full value from reading A Breakthrough in Strategic Planning I recommend reading the whole book.

If you are primarily interested in personal planning you can read up to the middle of page 40. If you are interested in corporate/strategic planning you can read from the middle of page 40 to the end.

Ron Tabachnick Strategic Facilitator

FOREWORD 1

Modern life has become far too complex. We need help to manage and effectively reduce the complexity we continuously face. This book provides you with the secret and the tools needed to cope with the daily complexity in business and in your personal life. It talks of "a breakthrough in strategic planning", a rather bold assertion. The breakthrough has to do with how to apply the decomplexifying tool described herein, to your organization as well as to your personal life. The goal is to enable you to substantially, and effectively reduce the complexity in our life.

The history and derivation of the word "strategy" relate to military planning, where strategic planning was born. To reduce the complexity in our business and personal lives demands the application of planning strategically. What techniques apply? Other than Ron's I know of no technique that can be effectively used to decomplexify both corporate **and** personal planning. Examples abound in the pages that follow.

There are two well-known phrases in the self-help movement:

- 1) "You alone can do it but, you can't do it alone" (you need a coach), and
- 2) "Helping you helps me (the coach gets something out of it too).

Ron's book provides you with the requisite coaching tools that can help you help yourselves as well as others both professionally and personally. Try it! Investigate for yourselves that you can now help others to reduce the complexity in their personal and business live and "Pay It Forward".

Write Ron and tell him of your experiences.

Read on, enjoy planning strategically and do not keep the secret a secret. Pass it on to those you know, and to those you love.

Enjoy your simpler life!

David A. Talbot, P. Eng.

FOREWARD 2

Making 'The Impossible' Happen

"I believe that this nation should commit itself to achieving the goal, before this decade is out, of landing a man on the moon and returning him safely to the Earth."

President John F. Kennedy, May 25 1961

Creating a vision that goes beyond your life connects your present actions not only with current but also future generations. Your vision can be a source of courage that energizes and motivates you to continue to move forward. Creating a vision of a compelling 'bigger future' then looking backward will provide you with the energy, focus and clarity to make decisions. There is no such thing as failure; there are only actions and results.

The results of your Authentic LeadershipTM in developing planning strategies will be understood and have its greatest impact on generations yet to be born. Great leaders such as Abraham Lincoln, John F. Kennedy, Tiger Woods, Walt Disney, Thomas Edison, Martin Luther King, Oprah Winfrey and *Barack Obama* have always known this truth.

Ron Tabachnick's book, A Breakthrough In Strategic Planning, is a real breakthrough focused on actions and results. His clients are better able to connect with their vision and the road upon which they are travelling. They both understand and feel a greater sense of urgency to take action and achieve their desired results. This clarity re-enforces their way of *being* authentic which attracts others to a shared future that is no longer impossible.

Ron has helped my Master of Business LeadershipTM coaching clients create their vision and the strategic plan to better results. Our combined service has proven to be very complementary leading to synergistic results. Ron is both a business partner and my friend. Together we are helping our clients make 'the impossible' happen.

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INTRODUCTION TO: A BREAKTHROUGH IN STRATEGIC PLANNING

ongratulations! You have chosen to use A BREAKTHROUGH IN STRATEGIC PLANNING to plan and organize everything from restructuring your company to designing a brochure, from planning an important event to reorganizing your closet. You know that opportunities abound, if you could just find the time and the way, and that some challenges have to be tackled head on.

The trouble is that projects big and small can seem overwhelming or get lost in the clutter of daily life. Studies show that top corporate executives spend over sixty percent of their time "putting out fires". What this means is that the fabulous new product that was supposed to be launched six months ago has moved to the back of the line behind bad weather, changes in people or suppliers and just about anything else that daily life can think of to derail it. That is why you need to plan quickly, making steps on a clear path towards a visible, desirable goal.

We all have to plan all the time and most people find ways to cope that work for them. However, even if you are a great planner who is managing really well on a daily basis, that extra project that suddenly presents itself can be incorporated into your life more easily and efficiently with a tried-and-true method of planning. Instead of being pushed into overload by the wedding that has to be planned at exam time, with a few hours of the RT planning method—let's call it "The Plan"—you can come up with the perfect strategy to make it all work.

The Plan that Made the Impossible Possible in Less Than a Day

The Plan worked a miracle for me personally one day after about five years of witnessing its effectiveness first-hand. Since then it has become my passion. I was working behind the scenes with The Plan's creator, David Talbot, when my first cousin Rossi died suddenly in California. I was heart-broken. We had grown up together and had remained close after she married and moved away. For those of us in Toronto who were unable to attend the funeral the following day, I wanted to hold a simultaneous memorial service. I can't do that, I said to myself. Where would I even begin?

With David's planning methods in mind, I went to my computer and loaded the outlining software he used in facilitating meetings. Inside I was feeling overwhelmed by the millions of details clamoring for my attention and climbing on top of each other. Who did I have to contact? How many people would be coming? Where the service would be held? What should I say? Who will speak? What if I forget someone? I can't do this. I've never done anything like it before. But I loved my cousin. I want to do this for her. I'll be too upset. There's not enough time.

Okay, slow down here, Ron. How does David get a room full of executives to take the first step of their strategic plan? I began with the purpose. A. The purpose is to hold a memorial service for my cousin went up on the screen. I

started to calm down but the fight among the thousands of details raged on. I'd better throw them out of my head and onto screen where I can keep an eye on them. When I started listing them they flew out fast and furiously, but much to my surprise there were not millions or thousands but only twenty or thirty, and they didn't look all that scary.

What a relief! After organizing these obstacles into groups and ranking them, I could now envision the memorial service that would benefit our family and friends. Instead of worrying about the clock ticking, I imagined myself feeling wonderful as I left the service that had been a huge success. Working back from the future as if it had already taken place, I listed everything that had made it a healing, memorable occasion. The location and the time of day were perfect. The master of ceremonies was engaging. I received a lot of help. The speeches and other contributions were inspiring. Everyone felt taken care of. I imagined that my cousin would have been proud of me.

Now it was time for action. Though I had seen others get down to step-by-step planning, I was personally amazed at how easily and naturally the actions presented themselves. Call my cousin Albert at 9:00 in the morning and ask him to handle the service. Make a list of everyone to invite. Ask my brother to get in touch with them. Put my nephew in charge of getting a card and having everyone sign it. Schedule the service so that it takes an hour and everyone who wants to contribute is heard.

Needless to say, the memorial service was a success and there was very little stress in making it happen. The notes I had made worked and we stuck to the schedule. My brother read a poem he had written, my cousin synchronized reading a letter to her late sister at the same time that it was being read at the funeral in California. Afterwards, everyone expressed their gratitude which made me very happy. The planning process made it work and I have been a true believer in it ever since.

How the Planning Process Was Engineered

Take a problem like confusion or a goal that seems unattainable. Give it to an engineer and he is bound to use the right tools to come up with an efficient, step-by-step solution. In the 1980's, Systems Engineer David Talbot developed *The Business Huddle* to focus corporate executives on producing strategic plans quickly. His tools were a computer, an overhead projector, a screen, outlining software for listing and moving text around easily and his secretary's lightning-speed typing. David's Business Huddle was used to plan corporate strategies and major mergers, and to map action plans that have led companies large and small to define their goals and overcome hurdles to reach them.

What David discovered, and indeed the success of the process to this day, is the power of seeing your words on the screen. "I see what you mean" – literally. Your thoughts framed as words that can be read, witnessed and organized is the key to coming up with an executable plan. Your ideas, now seen as words on the screen can be managed. They can be moved around, put into categories, deleted, shortened, elaborated and most importantly, acted upon.

The Planning method itself has been developed and adapted for different scenarios through years of experience. The planning techniques required by the corporation looking to expand over the next five years are different from those of the young entrepreneur launching her public relations business. But regardless of the procedure, the basis remains the same: address all the challenges or clear the confusion; envision and clearly state the goals; and plan your course of action one-step at a time.

A New Career Begins

RT Planning Strategies took root as my life's work shortly after planning my cousin's memorial service. I have always loved talking with people, and now my work behind the scenes with The Business Huddle was about to launch me into helping people plan. Sure enough, one day David was too sick to facilitate a corporate planning meeting. As it was too late to cancel, I stepped in as the understudy and have never looked back. Through the years of facilitating corporate meetings large and small, government policy making, working with entrepreneurs to start and run their businesses and helping individuals get married, retire, look for work etc., I have enjoyed every minute of it. Furthermore, I learn something new in each and every planning session.

It is with pleasure that I pass on my know-how to you. Follow my method and you can plan and pull off anything you can imagine.

Ron Tabachnick

Strategic Facilitator, RT Planning Strategies Inc.

"Until one is committed, there is hesitancy, the chance to draw back. Always ineffectiveness.

Concerning all acts of initiative (and creation) there is one elementary truth, the ignorance of which kills countless ideas and splendid plans: that the moment one definitely commits oneself, then providence moves too.

All sorts of things occur that would never otherwise have occurred.

A whole stream of events issues from the decision, raising in ones favor all manner of unforeseen incidents and meetings and material assistance which no man could have dreamt would come his way.

I have learned a deep respect for one of Goethe's couplets – "Whatever you can do or dream you can, begin it. Boldness has genius power and magic in it."

W.H. Murray, The Story of Everest

WHY PLAN? PLANNING THE PLAN

ow that you have learned The Plan basics, what else do you need to know in order to reach your goals and manifest your dreams? You envision what you want to achieve, list all your challenges and plan your actions step by step. Simple. Thanks, Ron. But hang on a minute. You know that we humans are more complicated than that. To quote Brian Klemmer, "If How-To's Were Enough, We Would All be Skinny, Rich & Happy." If planning were simple, alcoholics would stop drinking, no one would smoke and the courts would probably be empty. There would be no city planners, wedding planners or consultants of any kind. Theoretically, planning is easy but getting down to it takes some know-how.

Conscious Challenges to The Plan

Since I am advocating The Plan, let's start putting it to use. You already know that identifying challenges is the first component, so let's begin with challenging The Plan itself. Offloading challenges clears the way for setting goals and taking action.

So why use 'The Plan? Let's challenge it head on. Some people tell me they can plan their way forward themselves. If you are among them, more power to you. You have a clear mental picture of your goal and you know how to overcome issues in order to reach it. However, even for good planners, opportunities hide behind the clutter that

claims their attention every day. Plans for managing a new client who unexpectedly signed on, or for organizing that anniversary party, tend to get a little hazy amidst your already busy life.

In my experience, a lot of people find it hard to move from point A to point B. Too many issues and unexpected events crop up. There is too much resistance. We feel stuck in a rut. What is it about the humps and bumps in life that complicate things? The Plan helps you create your personal road map. It cuts the clutter; lets you lay your concerns on the table and helps you summon every important fact at your disposal. Clients have used The Plan to help organize a single aspect of their lives, or to plan their way through a huge challenge, long-term plan or event.

Nevertheless, here is a list of the most common challenges to The Plan that I hear.

Lists - They Work Just Fine

"Planning is easy. I make lists." "I make a list but then I don't even need to take it with me. Just making the list organizes me." Lists - I'm all for them. That's what we do in The Plan. We make lists.

The list that you write down on a piece of paper is a good beginning. For planning Thanksgiving dinner, you can make a grocery list, a wine list, a guest list and a to-do list. For hiring a new employee, you can make lists of prospects, their duties, available appointment times, skills required, equipment and space they will need. Is that everything? Where do you keep these lists? How easy are they to change? Do you need help? Do you make these lists when you are relaxed and focused or while the phone is ringing and you are feeling overwhelmed?

For relatively simple plans such as these, growing and changing lists are manageable. However, The Plan takes its lists to the next level, beyond the grocery list and the flip chart. Your lists get categorized and prioritized. By seeing them on a screen and focusing on them, you capture all the details and in most cases come up with some great new

ideas and strategies as well as time and energy savers. If Thanksgiving dinner has morphed into a banquet, or hiring one new employee into a sales team, lists won't cut it but The Plan will. Your lists evolve into—here it comes again—challenges, goals and scheduled actions. Does your grocery list envision the fabulous results of your cooking? How about time management? Does it identify where you could use some help or what you will do if the unexpected arises? The magic of The Plan is that it *simplifies* the list and tasks at hand.

Planning Versus Spontaneity

"Creativity has to be spontaneous." "I mentally prepare and then I act in the moment." "I'm intuitive." While my experience as an actor taught me that good performances are born from rehearsing, memorizing and planning, I have to admit that I have enjoyed some good improvisational theatre. Furthermore, I am impressed by those who can whip up a good meal from whatever they have on hand. Like lists, spontaneity is a good ingredient in manifesting a goal or vision. However, a goal of any magnitude including an inspired painting, an article, a song or a film clip requires forethought.

Seasoned travelers skillfully balance the thrill of the moment with planning. Friends and clients David and Phyllis are busy professionals who live for travel. They go on long canoe trips each summer, take ski trips in the winter and relax in exotic places in springtime. Every fifth year they take sabbaticals and explore the world. When they are not traveling they are planning their next trip. They dry food for camping, read countless travel books and magazines, converse with other travelers and study languages. A week or so before they leave for the other side of the world, they start changing their sleep and eating habits so that they don't even suffer jetlag when they arrive.

The payoff is that they have traveled to beautiful places way off the beaten track without a hitch. They know when and where the interesting local festivals are taking place, which fruits and vegetables are in season and where to find the spectacular waterfalls. Moreover, in their photographs they look like playful children without a care in the world. In one picture, they are merrily weaving through traffic on a moped in Cambodia. The Brazil album features them hanging out with the locals, either in café or playing music. In China, we see them at the top of a mountain they have climbed or cooking the fish they have caught over an open fire. They claim that their access to the world is a direct result of careful planning.

Now, if you are the spontaneous type, you may think planning sounds kind of boring. Why not just pick up and go? Isn't the fun of adventure in the unexpected? David smiles at this suggestion. He explains that the reality of travel is a lot of work. If you fail to plan ahead, you just may find your precious vacation time evaporating while you look for accommodation and acceptable places to eat. Trying desperately to communicate, finding places closed or crowded, getting sick, and dealing with the unexpected may not be the "in the moment" experiences you had in mind.

"I'm too busy. I don't have enough time to do The Plan."

This is precisely when you *should* use The Plan. Have you ever been in that state of overwhelm and found yourself taking a "long cut" because you felt you didn't have time to stop long enough to put a short cut in place? We've all done it. For example, when you are using a new software program to pump out a letter or spreadsheet, do you stop to search the help screen for a shortcut or do you continue doing things the long way around? When hosting an event, if you chilled for a moment to offload some of the details to a willing helper you would be farther ahead. You know that. Yet your stress makes you press on doing it all yourself.

One sad example is the presenter in a meeting writing frantically on flip charts, knowing that they cannot change them without making a mess and that others may not be able to read their handwriting. Yet they continue on,

not taking time to implement smarter changes. We use outlining software that allows us to make changes, save our work on the computer, change it again and project it onto a screen for everyone to read. Easy. But when we are in high gear, we drive on without stopping.

"My daily and weekly plans work well for me." Microplans Versus Macroplans.

Microplans are what we use on a daily and weekly basis. We buy groceries, pick up the dry cleaning, get together with friends, go to work, see clients, parent our kids, go to the gym and so forth. These are our routines. Macroplans are our bigger plans outside of the everyday—vacations, education, job changes, retirement plans, celebrations etc. Macroplans require a different strategy, particularly if they are going to get along well with microplans.

A social worker friend explains that a challenge for people living in poverty is maintaining the ability to plan. "When hope goes out the door, time flies out the window," she says.

Two of my clients of little means illustrate her point. Sid is a homeless Viet Nam veteran whose office is on the street corner in front of my office building. Jason is a computer science student from a small northern town who also lives on very little income. Sid is a microplanner, Jason a macroplanner. For Sid, each day is filled with the reactive tasks of finding food and shelter for himself and his dog while constantly dealing with his disability. A long-term vision is not something Sid can afford. On the other end of the scale, Jason's vision of the future career and lifestyle that awaits him is what sustains him. It makes his basement apartment, second-hand clothing and meager budget not only bearable, but an adventure, which he embraces with creativity and enthusiasm.

Microplans often hijack Macroplans and vice versa. The wedding plans have to be incorporated into your daily life no matter how full it is, and even the inspired artist creating a masterpiece has to have lunch and say goodnight to the children. It is a difficult balance for all of us. In my view, life is 90 percent maintenance, largely reactive and unpredictable. Executives report that they spend 60 percent of their time dealing with the unexpected that arises each day. This is life. As John Lennon sang, "Life is what happens to you when you're busy making other plans." With effective planning, your micro and macro plans can run parallel in harmony. Without it, they collide, jockey for position and grab your attention like an unruly pack of dogs.

RON'S PLAN FOR CHAPTER 1-OCTOBER 3

A. CHALLENGES

- 1. Readers don't see why they should plan.
- 2. Readers don't see the value in The Plan.

B. VISION

It is now April, six months later.

- 1. I am happy that Readers see value in Planning.
- I am happy that Readers are beginning to see how effective The Plan can be.

C. ACTION PLAN-30 DAYS

- List conscious reasons for not using The Plan.
 - a. Lists work fine.
 - b. Planning versus spontaneity.
 - d. Current daily planning works fine.
 - e. If it's so difficult to stay on track, why bother?
 - Make a really great case using Marshack's discovery of first calendar.
 - (2) Good planning incorporates constant adjustment. e.g. moon landing.
- 2. List unconscious barriers to planning.
 - When the unconscious becomes chaotic, it resists making order for emotional reasons.
 - b. The unconscious reacts rather than reasons.
- 3. Outline Anna's Personal Planning Session.

"If it is so difficult to keep a plan on track, why bother?"

Planning takes some work, it's true. Microplans do complicate macroplans. But once you have learned how to use The Plan, you can achieve any goal that you can imagine, making adjustments with ease as you go. It is my belief that we would not be enjoying civilization as we know it today without vision and planning. Richard Tarnas, author of *Cosmos and Psyche* says that planning is what differentiates man from all other species.³ While some bees and squirrels might disagree, we can concede that we have come a long way through planning. Let's go way, way back.

Planning and the Moon— A Brief History

In 1963 Alexander Marshack, author of *The Roots of Civilization*, was commissioned by NASA to produce an account of the technological achievements that had brought human beings to the threshold of landing a spacecraft on the moon. Though he and his researchers had discovered ancient calendars, artifacts and tools, Marshack had a problem with what he called the "suddenlies". Suddenly there were cave paintings in one region, spears from another era. Calendars, writing and ploughs existed without many clues as to what had led to their creation. Something was missing.

Going further and further back, Marshak's quest finally led him to a piece of bone with eight notches carved on it. This was it: a 30,000 year-old record of the phases of the moon was the source of mathematics, astronomy and agriculture. From the three-day dark of the moon, his research told him, came abstract thought where plans and ideas gestated. Where was the moon? When would the light return? Holding the image of the full moon when it was not visible led to forethought. Tracking the phases of the moon promoted counting, identifying patterns and planning activities which could be carried out on those nights when the night sky was bright.

This piece of bone was possibly the original planning diary for farmers who noticed growth and behavior patterns of plants and animals connected to the phases of the moon. Wolves howled on the full moon, seeds sown on the dark moon grew into bigger plants. There was a hunting season and a time to prepare for it; a time to plant and a time to harvest. It has been eighty-five generations between Dad going to work with a spear and making a killing in the stock market. Many challenges, visions and action plans have gone into making our world what it is today.

A Vision of the Moon Landing Leads to an Action Plan

On May 25, 1961, United States President John F. Kennedy gave a speech responding to the first orbital flight by a human, Russian cosmonaut Yuri Gagarin. He pledged to Congress that the United States would catch up. He committed to landing a man on the moon by 1970 and he asked for an extra \$1.7 billion to make it happen. With a vision and the beginnings of an action plan, Kennedy's goal was achieved. On July 29, 1969 Neil Armstrong, an American, walked on the moon.

Planning Requires Constant Adjustment

The lesson to be learned from the actual first moon voyage is that planning requires flexibility. With a clear, bright target and no traffic to worry about, you would think that the flight path from earth to moon would be a straight line. However, what scientists found was that the spacecraft Apollo was off course ninety-seven percent of the time. It had to tack like a sailboat catching the wind, constantly veering off and adjusting back to its course. Furthermore, with its target also moving quickly, when the Apollo got close to the moon it had to circle it a few times and reposition itself before landing. This is what we do all the time when we plan. We constantly have to adjust and

readjust as things change. But if we stay on course, goals are attainable and we do reach them.

Whether or not you have planned your road trip from one coast to the other or just jumped in the car and started driving, you can only see about two miles in front of you at any given time. Planned or not, the deer jumping in front of your car, the unexpected snow storm in September or the landslide in the Rockies is going to force you to make adjustments. However, without a tire jack, weather reports, maps or reservations, you run the risk of dealing with issues constantly. This is unnecessarily stressful, and the odds of reaching your destination on time are probably not in your favor. On the other hand, a plan that has a structure can incorporate these surprises with ease and flexibility.

Unconscious Challenges to The Plan

Maybe your lists and flipcharts are working for you. Great! I have listened to many cases over the years against planning in general, The Plan specifically or for using a different, preferred planning method. Curiously, no one who has actually used The Plan is among its opponents. This has led me to observe that resistance to planning is

JOHN F. KENNEDY'S MOON LANDING PLAN-1MAY61

A. THE VISION

It is 1970. I am very happy because

- 1. The US landed a man on the moon.
- The spacecraft and the astronauts returned safely to Earth.
- 3. The US got there first.

B. CHALLENGES

- 1. Money
- 2. Technology
- 3. The Russians are winning the space race.

C. ACTION PLAN

- Make a speech to Congress.-25MAY61

 Ask for an extra \$1.7 billion-25MAY61
- 2. Start training astronauts.-26MAY61
- 3. Spy on the Russians-ONGOING

often unconscious and that becoming aware of the blocks could open the door to successful planning.

When I first met Mike he was working at a job which he did not like. Changes in company ownership had increased the pressure to perform and, he felt, poisoned the atmosphere. Yet Mike would not look for a new job, nor would he follow up on job leads when they presented themselves. His reasons, which he believed wholeheartedly, were very convincing. "The devil you know is better than the devil you don't know." "With young kids, I can't run the risk of a new job not working out." "It's not so bad." "Planning is a waste of my precious time."

Alarmingly, he also dismissed as gossip all evidence that the company was going to be resold and relocated, which would leave him out in the cold. In fact, it was not until this happened that he used The Plan and found a much better job.

If you decline someone's job offer or business opportunity, you yourself may believe your reasons; that it is too risky, that your current situation is not so bad or that your family doesn't want to move. But what is really going on? You may be overwhelmed by the unknown, but if you threw some light on the darkness you could move forward. You may not have access to your resistance yourself because it is unconscious. Many psychologists claim that your unconscious gets the final say in your decision-making; from which toothpaste you buy to deciding on next year's business plan. While we may use all our powers of reasoning, research tells us that unbeknownst to us, our final decisions are emotional.

Order, Chaos and Resistance

Resistance to planning is huge, particularly when you are feeling overwhelmed - which is when planning is most important. The unconscious is a mysterious state of mind. We get glimpses of it. We know some of its characteristics. Psychiatrists, Psychologists, Shamans and religious professionals specialize in gaining access to it.

Paradoxically, the stormier the waters of the unconscious become, the less we understand what is going on and the more guarded we become. Many myths reflect this condition. There is trouble in the land, the hero slays the dragon and peace reigns once again. As the philosopher Friedrich Nietzsche once said, out of order comes chaos and out of chaos comes order. So why the resistance to making order out the chaos? Maybe because we fear change? It is anybody's guess really. The unconscious, like the dragon, roars when it is disturbed, it is magical when it is happy and it doesn't give us a lot of clues as to what makes it tick.

The story of Sedna becoming the sea goddess, central to the Inuit religion and culture, is an allegory of making order out of chaos. There are many versions of this story which is told on long, long winter nights throughout the Arctic. In all versions, Sedna is a beautiful young maiden who becomes the mother of all the sea creatures and controls the availability to Inuit hunters of seals, walruses, fish and whales.

As the story goes, Sedna lived happily at home with her parents whom she loved very much. Her father was a successful hunter and she had all the furs and food a girl could want. In fact, she had it so good that she refused to marry any of the suitors who came calling. Finally a handsome, well-dressed hunter came along and her father persuaded her to marry him. Off they went to his home.

Suddenly things got ugly—literally. It turned out her husband was really a raven that lived in a nest on a barren island and dined on disgusting little fish. Sedna was not happy and did what any girl would do. She threw a tantrum and screamed for her Daddy to come and take her home. Her father heard her and came paddling to her as fast he could, feeling guilty that he had encouraged the marriage.

As they were escaping in her father's kayak, the raven husband caught them, charged the kayak and created a huge arctic storm. Here it gets a little sketchy—it all happened so fast. It seems that while the father was fighting

with his raven son-in-law, Sedna fell overboard. She clung to the side of the kayak but her father was in such a panic that he hit her fingers with his paddle and cut them off. Sedna then sank to the bottom where she became a powerful spirit and her broken fingers became all the sea creatures.

A goddess with the head and torso of a woman and the tail of a fish, Sedna's companions are the seals, whales and all the other sea mammals. Hunters must treat her with respect. If they don't and if people behave badly, she drums up violent storms, her hair becomes tangled and she withholds all her sea creatures. In order to release them, a Shaman must swim down and comb out her hair. Then the seas calm and the hunters can catch food again. To this day, they thank Sedna for their catch, and in 2006 an asteroid was named in her honor.

To my 21st century Western mind, at first there were some disconnects to this story. Have you ever told someone about a dream you had only to find that it was not logical? "Then, somehow I was saving my daughter... but then a storm and a bird..." When you woke up, the dream seemed perfectly clear but in the telling, nothing made sense.

Myths like dreams come from the unconscious that doesn't seem to adhere to our worldly conscious logic. If Sedna's father loved her so much, why did he chop off her fingers with his paddle and send her to her watery grave? Hadn't he set out to rescue her? The explanation was that he was afraid, there was a storm, the raven was hassling him, chaos was amok and he was reacting in the moment – microplanning badly.

The unconscious is the part of us that defies logic but has a lot of power. It keeps us smoking, drinking and making poor choices as well as creating masterpieces, taking leaps of faith and doing the right thing at precisely the right time. Without stopping our frenzy to ask for help, we stare panic-stricken into space at the thought of changing jobs, rather than taking steps to make it happen. When the Shaman goes down into the unconscious and combs

Sedna's hair, order is restored. With the chaos of challenges out of the way, the waters are calmed, we can see our goal and make steps towards achieving it.

When we become overwhelmed or the unknown looms up, the feeling that order has turned to chaos can be frightening. How am I going to pull together a memorial service in one day? Or a wedding in two months? Or look for a new job for the first time in twenty years? With the source of the fear out of our reach in the murky waters of the unconscious, calling the Shaman is a better idea than either reacting or doing nothing. Step by step, by using The Plan, you can create order and sometimes magic. When Sedna is treated with respect, the status quo is order, harmony and abundance. The dragon slayer becomes king, the frog a prince. Often in a planning session, which is focused on dealing with one issue, a brilliant new idea or course of action emerges as if by magic.

Over the years, I have heard many challenges to either planning itself or using The Plan. In addition to the conscious reasons, more often than not, the obstacles are unconscious. This is tricky because they come from a place in us that is unknown. Born out of chaos, our emotions make us want to react rather than allowing us to tackle our issues and restore order. But if we use The Plan, we turn on the light, see the goal and proceed one step at a time. Then, all our wishes can be granted.

Clear the Challenges, See the Goal A Hands-On Plan

The clarity that follows when issues or challenges have been dumped is amazing. It is as if a fog has lifted and the horizon is visible. From there, a clear vision comes into focus and the steps to a plan of action fall out naturally "like a chicken laying an egg."

A New Business Emerges from the Ashes of Despair

Anna came for a planning session at the urging of her niece Susan, a friend of mine, who insisted that I would be able to help her aunt out of her despair. It was apparent when Anna walked in that she was not in the least convinced. "My niece was very kind to send me here but frankly, I don't see how you could help. There is nothing that can be done about my situation."

This was a tough one. "Well, okay. But it's a miserable day out so why don't stay for a cup of tea and we can talk." She agreed.

As we chatted about her niece's work overseas and the inconvenience of all the construction in the city, it was apparent that this woman was very unhappy. She looked exhausted, her voice was a monotone and she seemed to be carrying the weight of the world on her shoulders. My heart went out to her. "Since you're already here," I suggested, "would you like to see how The Plan works?"

"Really, there is not much that can be done," she repeated. We paused. I wasn't going to push. "But okay. Susan was kind enough to set this up. I'll do it for her."

Unloading the Challenges and Issues

With the computer, screen and projector set up and my technographer ready to record, we began. Anna's issues emerged slowly at first, punctuated by many sighs. "I retired six months ago." Pause. "There isn't much to tell."

I asked her about her career. She had been a nurse who had worked her way up into management and administration while still actively nursing patients. She had been specialized, loved her work and felt that her career had been a success. "And at the moment, what would you say is your main challenge to being retired?" I asked.

"I don't like it. I am bored and I feel useless." Once we had captured one issue, others began to flow more freely.

ANNA'S PLANNING STRATEGY

A. CHALLENGES

- 1. I retired six months ago and I don't like it.
- 2. I am bored.
- 3. I feel useless.
- 4. I spend most of my days taking care of my husband.
- 5. My stepchildren rarely visit their father.
- My stepchildren do not help me with my husband even when I ask them to.
- 7. The staff at the nursing home is incompetent.
- 8. I have to watch every little thing the caregivers do and make sure they aren't making mistakes.
- 9. If I miss a day at the home, when I return I find that my husband has not been cared for properly.
- Not only do I have to watch out for my husband, because I was a nurse I have to look out for the other patients.
- I have to run interference between the other patients' families and the staff and doctors.
 - a. I interpret for a Polish couple.
 - I keep an eye on a patient whose family lives out of town and can't visit now when she is sick.
- 12. My children live far away and I miss them.
 - Because I am living on a pension, I can't visit my daughter as often as I would like.
 - My obligations to my husband make it difficult for me to get away.
- Because my grandchildren are very young, it is difficult for my daughter to travel to see me.
- 14. I have no friends here.
- 15. My friends were the people I used to work with.
 - a. My friends are too busy with work to socialize.
 - b. Because we don't see each other at work every day, our friendships have faded.
 - I am quite angry with my friends for not making an effort to stay in touch with me.
- 16. I signed up to volunteer at an alternative health collective but they never contacted me.
- 17. I love going to the symphony but I have no one to go with.
- 18. I would like to visit family and friends in Europe more often but money and obligations to my husband prevent it.
- 19. A two-year long-distance relationship with a man I grew up with in Europe ended two weeks ago.
 - a. I am very sad about this.
 - b. I am embarrassed to visit my hometown and old friends even though they invite me.

Anna had other big concerns. Her husband, her second whom she had married when their children were grown, was many years her senior and had developed Alzheimer's disease. Although he had been moved to a nursing home, he still required a lot of care from Anna and she spent most of her days looking after him. Now the issues were emerging fast and furiously. Her husband's children rarely visited him, nor did they help her out in any way even when she asked. She felt that the staff at the home were incompetent and that she had to monitor her husband's care constantly.

Anna had become a valuable resource to the other patients and their families. As a former nurse, she often ran interference for them with the staff and doctors. For example, when a distressed wife was having no luck alerting the staff to her husband's constant drowsiness, she appealed to Anna, who determined that the patient was over medicated and brought it to a doctor's attention. A family who lived in another city asked Anna if she could keep an eye on their mother who had taken a turn for the worse. As Anna spoke many languages, yet another couple who spoke only Polish had come to depend on her to interpret for them. Anna explained these scenarios in great detail with a mixture of outrage and compassion.

Anna's list went on. She felt lonely. She lives in Canada. Her children and young grandchildren lived in the United States. Though she missed them terribly, her obligations made it impossible to visit them as often as she wished. As for friends, her social life had revolved around her job and now that she was retired, her friendships had dwindled. She loved the theatre and the symphony but had "no one to go with." "Everyone is too busy with work." She also complained that she had signed up to volunteer at an alternative health collective but as the organization had never contacted her, she had given up.

"Anything else?" I asked. She paused, sighed and looked down for a minute. Then she went on. Anna had

ANNA'S CHALLENGES GET CATEGORIZED

A. CHALLENGES

1. RETIREMENT

- a. I retired six months ago and I don't like it.
- b. I am bored.
- c. I feel useless.
- d. I signed up to volunteer at an alternative health collective but they never called me.

MY HUSBAND'S CARE

- a. I spend most of my days taking care of my husband.
- b. My step children rarely visit their father.
- c. My step children do not help me with my husband even when I ask them to.
- d. The staff at the nursing home is incompetent.
- e. I have to watch every little thing the caregivers do and make sure they aren't making mistakes.
- f. If I miss a day at the home, when I return I find that my husband has not been cared for properly.
- g. Not only do I have to watch out for my husband, because I was a nurse I have to look out for the other patients.
- I have to run interference between the other patients' families and the staff and doctors.

3. MY CHILDREN

- a. My children live far away and I miss them.
- b. Because my grandchildren are very young, it is difficult for my daughter to travel to see me.

4. SOCIAL LIFE

- I would like to visit family and friends in Europe more often but money and obligations to my husband prevent it.
- I love going to the symphony but I have no one to go with.
- c. I have no friends here.
- d. My friends were the people I used to work with.

5. PERSONAL LIFE

A two-year long-distance relationship with a man I grew up with in Europe ended two weeks ago.

grown up in Europe and still had many close ties with family and friends in her home town. She said that she would like to visit more often but money and responsibilities made it difficult.

I asked when she had last been there. "About three months ago in the summer. But...." More sighs. Finally she came out with it. She had just "been dumped" by her first-love sweetheart, with whom she had reconnected two years before. This made her very sad. She explained that his wife, who had not been well for many years, had found out about their relationship and the gentleman had done "the honorable thing."

This had also made her reluctant to go home to Europe, though her close friends urged her to visit them. Anna was very embarrassed in disclosing this. "There's no fool like an old fool they say." Then she actually smiled. She talked about how great it had been getting together with the boy she had loved in high school after all these years. They had so much in common and they enjoyed so many of the same interests and friends. Again she sighed, but this time with relief.

Now the challenges list was complete. "Is that everything?" I asked.

"Yes." She read the list aloud, resonating with her words. We then categorized each one, further ordering what had seemed so chaotic. The final step was to prioritize them. With the category headings by themselves on the screen, she decided which were most and least important. Sorted and packaged, her issues were now manageable.

A different woman from the woeful burdened soul, who had plodded through my door that morning, sprang out of her chair to take a break. Her eyes sparkled, she smiled and I swear there was a skip in her step. Her physical appearance had changed and the dense atmosphere in the room had lifted.

ANNA'S CHALLENGES GET PRIORITIZED

A. CHALLENGES

- 1. RETIREMENT
- 2. MY HUSBAND'S CARE
- 2. PERSONAL LIFE
- 3. MY CHILDREN
- 4. SOCIAL LIFE

Setting Goals and Creating a Vision

The new Anna who had shifted her burden from her mind to the screen was ready to envision the life she wanted and set some goals for herself. I invited her to step six months into the future and describe her life. "It is a beautiful spring day and you and I meet. I ask you why you look so happy."

"I'm happy because I am busy. My life is full," she said, with a look of satisfaction.

"And how are you feeling these days?"

"I feel great," she replied. "Fulfilled."

In no particular order and with very little prompting, Anna began enthusiastically describing her new life. "My husband is receiving better care. His children are visiting him more, which gives me more time to myself. I have had two weeklong visits with my daughter. I have met some new friends and reconnected with some of my old friends. I have season's tickets to the symphony and I am planning to go to Europe in the summer."

Anna then paused and thoughtfully looked down at the pages listing her challenges. As I have found that focus is the key to the most effective goal setting, I too examined the list of her challenges. Topping it was her retirement. "And how are you feeling your days?" I asked.

"I am working. I am helping people. My work is interesting, diverse and effective. I'm not just putting on a smock and guiding visitors to hospital elevators."

ANNA'S VISION

It is now six months later. I feel great and fulfilled.

- 1. It feels good to be busy.
- 2. My husband is receiving good care.
- 3. My husband's children are visiting him more often.
- 4. My stepchildren are helping me with their father's care.
- 5. I have had two weeklong visits with my daughter.
 - My daughter and I enjoyed each other's company.I was able to help out with my grandchildren.
- 6. I have season's tickets to the symphony.
- 7. I have met new friends through work.
- 8. I have found a flow for continuing my old friendships.
- 9. I no longer feel "slighted" by friends who are busy.
- 10. I am excited about going to Europe for a visit this summer.
- 11. It feels great to be working.
- 12. My work is diverse and rewarding.
- 13. I am helping people.
 - My work is important. I am not just a nice lady in a smock guiding visitors to the hospital elevators.
- 14. I am very effectively running interference between staff, patients and their families at the nursing home.
 - This role has a structure to it.
 - b. My voice is heard.
- 15. I am very involved in interpreting.
 - a. I have found others who can interpret if I can't.
- 16. I do "medical interpretation" for patients and families.
- 17. I spend time with patients finding out what they need.
- 18. The staff respect me.
- 19. I am a patient advocate.
- 20. I run information sessions for families and patients.
- 21. I am getting paid for my work.
- 22. I am a liaison between medical staff and patients.
 - a. in hospitals
 - b. in long-term care facilities
 - c. in rehabilitation centers
- 23. I am heading up a network of patient advocates.
 - a. volunteers
 - b. not for profit organization
- 24. I am investigating outreach programs for families of patients who live out of town.
 - a. finding affordable places for them to stay
 - b. providing "backup" visiting for patients

Anna envisioned started to take shape. "Are you still spending your days at the nursing home?" I asked.

"Yes, but... not just visiting."

"What about the incompetent staff? Any progress there?"

She replied with a firm "Yes."

"Still running interference with doctors and patients' families? Translating? Watching over patients whose families are out of town?"

"Yes."

And so it went until that "Aha" moment which hit us both at about the same nanosecond. "I'm a patient advocate! That's what I'm doing. I am a liaison between all staff, patients and families. I pick up everything that slips through the cracks."

We started recording the goals at warp speed as Anna's new business grew before our eyes. "I interface with all of the healthcare team – the physiotherapists, occupational therapists and dieticians. I find interpreters for people." She added a few more ideas. The vision was fully in focus. Back in the present, Anna commented, "I'm doing all these things anyway. I bet I could get paid for it or find volunteers. I could organize information sessions."

This vision was so right for Anna that again she transformed into the calm, competent, compassionate woman she had probably been for most of her life. The discontented whiner was nowhere to be found. Instead, I saw her as vibrant, communicative and considerate.

With the Vision and Goals categorized, prioritized and printed, it was time to move on to the action plan. The break was quick this time because we were eager to get down to it.

Action!

You would think that the action plan would be the difficult part, the "grunt work." However with the challenges out of the way, the vision becomes clear; seeing

ANNA'S VISION GETS CATEGORIZED

It is now six months later. I feel great and fulfilled.

1. WORK

- a. It feels great to be working.
- b. My work is diverse and rewarding.
- c. I am very effectively running interference between staff, patients and their families at the nursing home.
- d. I am very involved in interpreting.
- e. I do "medical interpretation" for patients and families.
- f. I spend time with patients finding out what they need.
- g. The staff respects me.
- h. I am a patient advocate.
- i. I run information sessions for families and patients.
- j. I am a liaison between medical staff and patients.
- k. I am heading up a network of patient advocates.
- I am investigating outreach programs for families of patients who live out of town.

2. MY HUSBAND'S CARE

- a. My husband is receiving good care.
- b. My husband's children are visiting him more often.
- My step children are helping me with their father's care.

3. MY CHILDREN

a. I have had two week-long visits with my daughter.

4. SOCIAL LIFE

- a. I have season's tickets to the symphony.
- b. I have met new friends through work.
- c. I have found a flow for continuing my old friendships.
- d. I no longer feel "slighted" by friends who are busy.
- e. I am excited about going to Europe for a visit this summer.

5. RETIREMENT

- a. It feels good to be busy.
- b. I am helping people.
- c. I am getting paid for my work.

clear goals ahead, the action plan unfolds effortlessly one step at a time.

Anna approached the action plan with enthusiasm. I, on the other hand, was a little more cautious. Since she had come in feeling hopeless, I felt that if she approached too many people or the wrong people with her plan, she would become discouraged. In my experience, when the chaotic waters of the unconscious have been calmed, the that hatch are voung and tender. While visions brainstorming is sometimes a good thing, often visions need to grow and play before being handled too much. Others might mean well but it is your baby. You know what is best for it and you have to protect it until it is big enough to fly. At the same time, you do have to take immediate action to manifest it so that it doesn't fade. Start with baby steps, one foot in front of the other. Plan the first few concrete, manageable steps and let the new vision get lots of rest.

The first step of a journey is always the most difficult. In Anna's case, with a well organized Vision as our guide we were able to jump right in. "I am a patient advocate," I read from the Vision. "What was the first step you took towards making this happen?" I asked.

"I talked to people," she replied. A lengthy discussion ensued as to whom she would speak with and why. She realized that she might face opposition and speculated on how she would have to handle it. Liability and resistance from the healthcare system would be the first points that friends would raise, and Anna was aware that they would have to be addressed, but she was determined to surmount all obstacles.

Anna decided that her first action was to contact Natalie, the administrator of the hospital where Anna used to work. Natalie had been a good friend and she certainly knew her way around the healthcare system. Anna committed to meeting with Natalie within a week. Next, she decided that it was important to find out the latitude of volunteer organizations in patient advocacy. Tomorrow she would pursue the volunteer organization she had previously

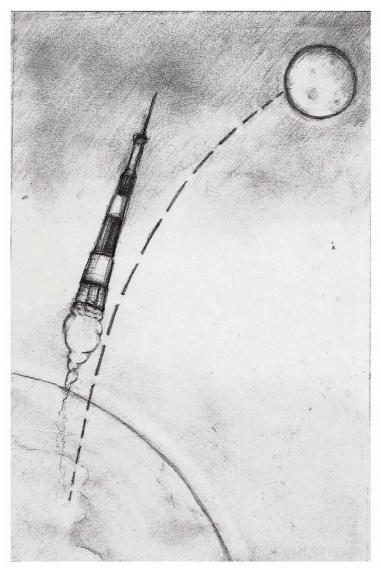
approached. Step three: "Don't discuss my idea with anyone until the first two actions have been carried out."

Still in the works, Anna's plan has unfolded very well. She is volunteering with a wellness centre group and she has organized a networking group for the families at her husband's nursing home while investigating related business and employment opportunities. Her action plan undergoes readjustment but her six-month goal of being busy, useful and connected with family and friends has been achieved.

Do All Plans Work All the Time?

What I have experienced is that if The Plan doesn't work, it was probably the wrong plan. Sedna's father's plan of marrying his daughter off to the next hunter that came along was flawed. "The next" is neither the best nor the most compatible, particularly for a prima donna like Sedna. As for the rescue, it had no strategic plan. Finally, the right plan was treating Sedna with respect and making a policy to call on the Shaman when chaos sets in.

Change can be scary. When the wolves are at the door, our unconscious pushes us into fight or flight mode. Cranked up and ready to react, we cannot slow down and plan. Everything comes at us at once. If the wolves are unconscious, they may fool us into thinking that we are in control, that if we make lists and flipcharts, it will all work out. But if we take time out to follow The Plan, we will arrive safely at our destination of choice.



Due to the number of variables of space travel, scientists had to constantly adjust and correct their methods. After many failures, Apollo 11 successfully landed on the moon and returned back to Earth safely. When attempting to plan for the future, you must always be prepared for self-correction, in order to continue on to your goals.

THE FIRST STEP WHERE TO BEGIN?

ow that you have seen effective planning in action for an individual, let's look at how it works for a collaborative project. The structure of The Plan is the same for both. But when more than one person is involved, we use the process in a meeting environment where it has a way of maximizing the potential of individuals and the group alike. In this chapter we introduce you to the hows and whys, the practicalities and the principles that make The Plan so effective, finishing up with a corporate planning meeting.

State Your Purpose

What do you want to achieve? Before you even schedule the meeting, you need to state your purpose in a focused sentence that says it all. "The purpose of this planning meeting is to make my wedding day the happiest of my life." Or "The purpose of our annual retreat is to strengthen our team and develop strategies to increase our sales."

Dr. Stephen Covey's Seven Habits of Highly Effective People ranks "starting with the end in mind" as Habit #2 (second only to being proactive). ⁴ "By developing the habit of concentrating on relevant activities you will build a platform to avoid distractions and become more productive and successful." I couldn't agree more. Synchronistically, this has been key to The Plan from day one as everything follows from the established purpose.

While some people choose to frame the purpose at the beginning of the meeting, I find that it is more productive for everyone if it is in place beforehand. With a clear purpose, you can easily get on with the business at hand and avoid the "details trap" and some of the energydraining power struggles that give meetings such a bad rap.

Consider using the purpose in the title of the meeting and state it clearly in your first invitation to participants. Though the purpose may be obvious to whoever is spearheading the meeting, other participants may have a different objectives or expectations. The VP of Sales may be looking to grow the business by ten percent while the CFO is considering the option of selling the company. Both are valid goals but may not belong in the same meeting. Avoid surprises!

Assemble Your Tools

While it may seem a little premature to be getting out the projector at this early stage, the tools we use are an integral part of The Plan, woven into the fabric of it along with the meeting purpose. We use:

- a computer
- an outlining software
- a printer
- a projector and screen
- a technographer (someone to type notes)
- a clear understanding of The Plan

Decide On Which Way to Proceed

- Should you start with challenges/issues/concerns or goals/vision/what you want?
- Should you work with a facilitator/coach and if so, whom?

Don't worry, we will get to each and every one of the items on this list.

Challenges or Goals? Which Comes First?

Even if your goal is clear, start with the challenges. The late President Kennedy's goal to put a man on the moon within nine years was clear. Who, how or how much was secondary. Anna, on the other hand, was unable to believe in the possibility of a vision until illuminating her challenges had lifted the darkness. Jason the computer science student knew exactly where he was headed in five years and chose to deal with day to day challenges as they arose; Sid the homeless person's challenges were too allencompassing to be able to see a goal further than a few hours ahead.

You may be somewhere in between with a definite goal slightly shrouded in fog. For example, when Cynthia and John came to me to help plan their wedding, they had the date set and some idea of what they wanted, but time and money constraints were clouding their vision and pushing them into overload. Given the choice, they began with their challenges. From there they were able to gain a clear, focused picture of their perfect wedding.

I can see clearly now, the rain has gone
I can see all obstacles in my way
Gone are the dark clouds that had me blind
It's gonna be a bright, bright sun shiny day

- Johnny Nash

Johnny's Nash's song "I can see clearly now" could well have been Anna's theme song. What I have found, with few exceptions, is that offloading challenges makes for a clearer vision. Even in corporate meetings where there is a firm goal or deadline, dealing head-on with challenges brings the goal into focus.

Vision, Goal, What I Want—What's the Difference?

For the purposes of The Plan, it is up to you to decide which word works best for you. Where are you headed? How far-reaching is your destination? Is it tangible or closer to the dream state? Is it: I want to be a movie star when I grow up; I have to plan my wedding in two months; or, I really want to find a better job? What term do you feel is a fit? Since I believe that you can achieve anything that you can imagine, for now, let's go with "vision". Just as challenges may come from the chaos of the unconscious, visions emerge from the calmer depths and heights of our being, that place that makes itself known to us in dreams, prayer and meditation. The imagination is there, cheering us on from behind the scenes and inviting us to draw on it.

Most of us at one time or another has experienced déjà vu, the feeling that we dreamed our present moment of reality before it happened. Some people can even pinpoint the dream. "Last summer when we were at the cottage I dreamt that it was winter and I had a new job." They recall that the dream forecasted perfectly such details as the colors of rooms and the people involved. There are a few theories for déjà vu but no absolute scientific explanation. Consider for a moment that déjà vu is a form of planning. Is it possible that months later you manifested what you had dreamt at the cottage last summer, that your unconscious was able to organize all the components of your dream into a plan? Your unconscious is very powerful. Draw on it, envision your dream as if it is a fait accompli and chances are you can make it happen.

Neuroplasticity—The Brain Science of Making Dreams Come True

For anyone who is skeptical that we can achieve whatever we envision, Neuroplasticity, one of the most extraordinary discoveries of the twentieth century, demonstrates that thinking, learning and acting can actually change the brain's functional anatomy. A few decades ago the consensus was that many areas of the brain were "hardwired" after maturity. But now we find that it is "plastic" or mutable, that a healthy part of the brain can take on the job of an area that is damaged.

In his moving and inspiring book *The Brain that Changes Itself*, Psychiatrist and Psychoanalyst Dr. Norman Doidge introduces us to people with limitations whose lives have been transformed by "brain rewiring" – a woman born with half a brain that rewired itself to function as a whole, aging brains rejuvenated, IQs raised, depression and anxiety overcome and so forth. This is very exciting for those of us who have believed all along that you can achieve anything if you put your mind to it.

Watch Your Language

Your conscious mind is also very good at manifesting, and it can work very well with your unconscious. The laws of attraction say that you attract what you think about, good or bad. For example, "I don't want to be poor" is likely to attract poverty while "I want to enjoy the finer things in life" is a gateway to bringing some nice things your way.

"Did you say *poor*?" the universe asks, and then delivers what you are focusing on. Picture your dream house and move into it. That the words we choose play a role in what we attract is a belief of many religions which deem some "curse words" and others sacred.

Thoughts are things. "I see what you mean," we say when someone else's thoughts become clear to us. Part of The Plan's effectiveness, in fact, is that we see our thoughts on the screen. They become tangible. We can look at them,

move them around, organize them and adjust them. We make our thoughts real with words and give ourselves a choice in changing and managing that reality. By naming our challenges first and getting them out of the way, we can use words to build our dreams.

Challenge Words and Vision Words

A rule of thumb is that challenge words express your true thoughts and feelings both positively and negatively, while vision words are chosen to attract the positive. If you have negative thoughts and feelings, challenges would be the place to dump them. There is much controversy today over whether or not words change perceptions. Do the terms "made redundant" and "terminated" make "getting sacked" or "fired" a more pleasant experience?

For the purposes of The Plan, let's make some distinctions. First of all, it is important that you express yourself in your own words. "I'm mad as hell that I lost my job," expresses how you feel; "I understand that downsizing was necessary and I am challenged by this decision," does not, and in fact denies you and others access to your true feelings.

In Anna's plan, the words "care" and "obligation" regarding her husband expressed very different sentiments. It is important that you give a voice to your thoughts and feelings and that you pay attention to the words with which you frame them. It is equally important that you build your future with strong, positive expression and a view to what you want to attract. If you speak more than one language, you know that much is lost or changed in translation. If you say what you mean and mean what you say, you can meet your challenges head-on.

The Victory Vision

Native people attribute Custer's last stand (the massacre of the US Army by the First Nations People) to his enemy's vision. Chief Sitting Bull's vision quest was no

match for Custer's army and the Sioux and Lakota nations won the Battle of the Little Bighorn against all odds. The story, told to me by a Native friend, begins back in the 1870's during the gold rush in what is now South Dakota. The Native people, displaced from their land by settlers, had been fighting back for more than a decade. In June 1876, word came that the US Army was on its way to do battle with them within days.

When the news reached the territory, all the chiefs got together to come up with their strategy. Among them were Lakota Chief Crazy Horse and Sitting Bull, the Sioux' powerful Medicine Man. They decided that Crazy Horse would lead the battle and Sitting Bull would come up with a vision. Though Sitting Bull was also a courageous warrior, the plan was that he would not fight. Instead, in the event that all the braves were killed, he would be the one to take care of the women and children.

Though the Lakota and Sioux were adept warriors, they had no plan, no idea what to expect and little time. What they needed most was for Sitting Bull to go on a vision quest. In his Sundance ritual, Sitting Bull had to connect with his spirit guides which he did by fasting, chanting and cutting himself in sacrifice to the Great Spirit. Meanwhile, Crazy Horse and the others waited for his vision with great anticipation as time was running out.

Finally the vision came and Sitting Bull returned and told the others about it. He had seen the soldiers as little specks way up in the sky, falling like rain from their upsidedown horses and landing in the Lakota camp "like grasshoppers." The warriors were all very happy with this forecast of victory and sure enough, a few days later Custer's army was massacred.

What I find remarkable is the expanse of Sitting Bull's vision. While the Great Spirit tipped him off that they were going to win, I believe Sitting Bull was also given a glimpse of the white man's future wars with fighter planes and bombs. Think about it: this was 1876 when nothing but birds traveled the skies, and it would be another thirty-eight

years before battle was fought from the air in the first "Great War."

Focus and Vision

There are no limits to your vision. The more focused your goal, the better your chances are for success. Jerry Seinfeld knew when he was four years old that he wanted to be a comedian. He says that he lived for jokes from then on, and when he grew up he worked very hard to achieve his goal.

Employment counselors tell us that the more focused your career objectives, the better your chances are of getting a job. Paradoxically, they tell us, even if you are desperate for any job, rather than parading your vast array of talents, you should focus on a specific target. The résumé that tells how great you are at everything, from delivering newspapers to teaching tennis, could obscure your talents as an account manager on urban building projects. Worse, it does not tell prospective employers what you really want to do. Maybe you hate being an accountant and are really hoping for that cruise ship job to come through. As the Joe Jackson song says, "You can't get what you want, 'til you know what you want."

More often than not, focused goals emerge from expansive dreams. The only thing Jerry Seinfeld had to start with was an unbridled desire, which was enough to provide the single-mindedness and drive to succeed. I doubt that Jerry's high school guidance counselor offered "comedian" as a mapped-out career choice. Moreover, his parents, to their credit, thought he would outgrow his childhood dream but did nothing to harm it or deter him.

Jerry did veer off course for a semester at community college. But like the Apollo going to the moon, he self-corrected by dropping out, perfecting his act and getting himself a gig at the Catch a Rising Star Comedy Club in New York. We could say that the rest is history except for the fact that his contemporaries from that era report that he was the most tenacious, hard working comic among them.

Movies also are made of big dreams. Even with careful planning however, in order to bring them to the screen, much more footage is shot than is actually used. Miles of film are edited and woven into the movies we see with consistent plots, characters and continuity. Similarly, using The Plan we envision our goal a year in the future and our step-by-step focuses on the sixty days ahead.

Your objective with the vision is to use your imagination and creativity to the fullest but also to keep it real and focused. For example, what is a realistic financial target? How much time do you need to launch your business properly? Like the film editing process, an expansive, complete picture illuminates the first and most crucial steps to take, and from there the others follow logically.

In working with clients on their company's branding and marketing, the goal of coming up with a mission statement requires a vision quest worthy of Sitting Bull. Referred to as "the elevator pitch," marketing professionals see this ten-word distillation of who you are and what you do as essential to any successful business. Why ten words? Because that is how focused you have to be on what your business is about. These ten words are the gateway to the right clients, services, activities and employees. Without focus, your resources and energy become scattered. I star in a successful half-hour comedy TV show is a very focused vision.

The mission statement often has a difficult labor and delivery but The Plan is the ideal midwife. Born from a limitless, broad vision, the paring down process can be arduous. However, with everyone's attention on the screen, brainstorming flows easily. Each person can give as much outrageous input as they like because editing, moving and synthesizing text is easy and fluid. "Move that up." "Put that there." "Try it this way." Focused collaboration is a powerful planning tool, perfect for distilling big visions.

In the process of making your vision into a focused goal, it is important that you consider who and what will be involved in paring it down. Focus groups are a valuable tool in the billion-dollar industry of advertising and marketing. A

creative-ideas team comes up with a concept which is given form by artists and writers. Well before the public sees the advertisements, they are test marketed on small groups of people who are paid for their feedback. By the time you or I see the ad, it has been worked and reworked, based on the reactions of focus groups.

Though you may not need a focus group to assess your wedding plans or job strategies, consider carefully which part of your vision to share and with whom. Well-meaning people may not be qualified to critique your vision, and your newly minted plan may need some time to get ready for exposure. If you believe in it and can see it clearly, hold it close and dear until it takes its first steps. Anna's Plan was all about addressing concerns and attaining a vision. The right action for the fledgling vision was to talk to two people only about it.

A Collaborative Vision

Now that you are familiar with the process of one person using The Plan, let's take a look at planning for a group. Corporate or group planning works much the same way, with many people identifying a common goal. The vision becomes a collaborative exercise and as a facilitator, my job is to keep it on track. To gain a better understanding of how this works, I invite you to observe Datastore's annual retreat.

THE DATASTORE PLAN Time for a Change, Ready or Not

Datastore has been a client of mine for years. Starting out in the typewriter era, they successfully transitioned to the information technology age, developing a nice niche in data warehousing. Each year, we meet to plan the year ahead. We address new issues that emerge, brainstorm new business opportunities and strengthen the team. Throughout the year, we use planning sessions for management strategy, new project launches and, of course, to put out the fires that inevitably ignite.

I confess before we go any further that I do not pretend to understand the workings of my clients' businesses. As a facilitator, what is important to me is helping teams to communicate and plan effectively to ensure their success. That they identify an issue which gets resolved is important to me, not the details of the issue itself. In fact, I have been told by many clients that not knowing the intricacies of their business is an advantage because, they reason, it keeps them on track instead of detouring into details. Details can be another place to hide from the bigger picture, a very tricky form of resistance for me to guard against.

Datastore enjoyed success and prosperity for years. With its head office in Nebraska, Datastore is the Canadian branch whose biggest clients are a global retail chain and an international insurance company. They have also made inroads with Asian companies setting up shop in Canada. About two years ago, things started to change for Datastore. Their business had become more competitive globally, technology was changing rapidly and data security had become a big concern. With identity theft and credit card fraud on the increase, it was essential that their financial services clients have the best available security systems in place. The reality, however, was that their major clients were expressing dissatisfaction with their declining service and Datastore was having difficulty bringing in new business.

A year ago, the company was restructured and Steve was brought up from head office to be the new VP in charge of business development. His mandate was to upgrade their technology, rejuvenate the sales force, streamline systems with head office and implement some innovative new business strategies. Instead of competing with offshore companies, they would partner with them. They would tap into the growing market of data security. Their branding and marketing strategies would undergo a makeover. But their most creative and challenging goal was to develop the consulting side of the business and integrate it with sales. In addition to selling computer systems and services, they would advise on complete business systems.

A very personable guy with a lot of experience in running companies, Steve embraced his new position with enthusiasm and everyone was happy at first. In my preparation meetings with Steve for their annual retreat I had to ask myself: Has it only been a year since their annual meeting was simply about some service improvements and exceeding sales targets?

Clearly, they were having a lot of difficulty with change and their business was not doing well. Their top client, let's call them the Q International Insurance Group was not happy. Putting out fires consumed 90 per cent of Datastore's attention. Furthermore, there had been a high turnover in staff. There was a lot of complaining in the company about the inefficiency of dealing with head office and vast differences of opinion on how things should be done. People were feeling threatened, the team was fragmented and clients were being hit with the fallout.

The Datastore Challenge Begins

Troubled or not, it was a beautiful day and the meeting was off to a good start with cheerful conversation over a sumptuous breakfast in an attractive hotel conference room. I introduced my team and myself and we went over the meeting guidelines. The last person to arrive was Cheryl, Datastore's top sales person in charge of Q Insurance. A striking, opulently dressed woman, we waited for her to finish her cell phone conversation before starting the meeting.

Steve led with welcoming everyone and giving a brief talk on the purpose of gathering, which was to connect with each other, address current issues and do some brainstorming. Calmly but firmly he conveyed the message that if they wanted to stay in business, sales and service would have to improve. As Cheryl checked her phone messages, rattled papers and whispered to her neighbor, it became apparent that she was anxious and that she had issues with Steve.

With the threats out on the table, this was a meeting where challenges would have to be dealt with before any vision or strategy could emerge. After a go-around of introductions and some ice breaking, we got down to business.

Since I sensed a lot of resistance, I decided to pay a visit to the unconscious by having them draw pictures of how they currently viewed the company. A collaborative effort, three groups of three went to work with colored magic markers on flip charts. Animated, they laughed and talked as they picked an artist and collaborated on an image. Interestingly, all three pictures depicted a dysfunctional vehicle: a car which was falling apart, a bus driving off a cliff and a capsizing sailboat whose skipper was tied to the mast. Reactive, chaotic, fight-or-flight—these were troubled waters begging for a 9-1-1 call to the Shaman.

The Challenges List

Back at the table, we began with a go-around of each person stating an issue which was typed by my technographer and projected onto the screen at the front of the room. With each person speaking in turn, the list of issues grew. Poor sales, fierce competition, he said/she said, mistakes and outdated marketing issues flew up for all to see.

Lenny, the quiet, unassuming Project Manager was the dark horse who came out in front. Tactfully and respectfully, he gave anecdotal evidence of Sales promising service to clients whose deadlines were impossible to meet, service delays due to staff shortages, lots of mistakes in what clients were being sold, miscommunication etc. The Vice President of Human Resources gave her side of the story. Accounting complained about head office and on it went. Initially it seemed that the challenges would never end, but eventually when I asked if anyone had anything to add, it was agreed that the list was complete.

When you examine the planning session notes included here, bear in mind that what is recorded is often a distillation of a discussion. Participants voice opinions, describe different scenarios, exchange views, express thoughts and tell stories, until they find the words that best

DATASTORE CHALLENGES LISTED

We have not made any new sales this year.

- 1. Competition from offshore data storage is killing us.
- 2. We lost a major client back in December.
- 3. The Z Retail project was such a disaster that we could lose them as a client.
- 4. Two Sales people quit.
- 5. Q Insurance complains about service on a daily basis.

Q Insurance is unreasonably demanding.

- We have not formulated a plan for Q Insurance's much needed upgrade.
- 7. We have to clear too many decisions with head office.
- 8. All our projects are behind schedule.
- 9. We do not train technical people properly.
- 10. Head office decisions take too much time.
- 11. Head office takes a long time to release funds.
 - a. This slows us down.
 - b. This alienates our creditors.
- 12. Head office does not budget for training people.
- Sales and project management do not communicate well.
- 14. Our clients are getting short changed in consulting.
- 15. Sales makes promises that Service can't keep.
- 16. Sales sells services that clients do not need.
- 17. Our marketing is out of date.
- Technicians are overworked because new hires do not get up to speed quickly.
- 19. There is no comprehensive training for Sales people.
- 20. Demands of existing clients are making it difficult to implement new business strategies.

Apprenticing rather than training has resulted in costly mistakes.

Our profits did not meet our projections this year.

- 21. Offshore partnering projects are behind schedule.
- 22. Data insurance is timely but we are not devoting ourselves to launching this business model.
 - a. If we don't act quickly, we will be "scooped" by the competition.

Head office pays attention to "the bottom line" and will not increase our budgets if we are not making money.

Service is not delivering what Sales is selling.

The "innovations" that are being proposed are not what our clients want.

Data insurance does not have a track record and we don't know if it will sell.

encapsulate their issue. If they need to have a particular individual hear them, they can address that person directly. In the end, it is their words that are recorded. Not only does this help to focus thinking, but it also serves to produce a succinct, useful set of meeting notes.

The next step was to read the list of issues aloud and reflect upon them. Proceeding in seating order, each point was read aloud by the team. A lot of issues overlapped and some of the same issues were expressed differently. At this stage, it is important to work through the list as it is, trusting that it will be streamlined when it gets categorized and prioritized. Fussing with duplications and wording can be a form of resistance and cloud the issues your group struggled so hard to unearth.

Some people's concerns were directly related to their own situation while for others, the company was top of mind. There were also opposing concerns, for example, "Management wants to fix what isn't broken," and "Sales people just want to keep cruising along." Ouch! How would we develop a common vision or plan of action out of this list?

I have noticed that reading someone else's issue aloud or hearing your own read by another who may in no way agree with you has a calming and bonding affect. Maybe it is because "trying on" another's concern promotes understanding. The expression, "That's a load off my mind" covers it. As with Anna's personal session, voicing the exhaustive list of beefs cleared the air. When we had finished Datastore's list, Cheryl was more focused and Steve was looking less like a deer caught in the headlights.

Were all the issues heard? Maybe, maybe not. Some were conspicuous in their absence. In the process of collecting everyone's concerns, without animosity or finger pointing, it became apparent that Cheryl was responsible for much of the discord, both within the company and between Datastore and Q Insurance. She had sold them "the wrong stuff". She had not brought in a consultant nor had she worked with the project management team on scheduling

DATASTORE CHALLENGES CATEGORIZED

1. FINANCIAL

- a. Our profits did not meet our projections this year.
- Head office pays attention to "the bottom line" and will not increase our budgets if we are not making money.
- c. Offshore partnering will not increase our revenue.

2. SALES

- a. We have not made any new sales this year.
- b. Two Sales people quit.

3. THE EXISTING BUSINESS

- a. Competition from offshore data storage is killing us.
- b. We lost a major client back in December.
- c. We have not formulated a plan for Q Insurance's much needed upgrade.

4. SERVICE AND PROJECT MANAGEMENT

- a. Q Insurance complains about service on a daily basis.
- b. Q Insurance is unreasonably demanding.
- c. Sales makes promises that Service can't keep.

5. BUSINESS DEVELOPMENT

- Demands of existing clients are making it difficult to implement new business strategies.
- b. Offshore partnering projects are behind schedule.
- c. The "innovations" that are being proposed are not what our clients want.

6. HUMAN RESOURCES

- Technicians are overworked because new hires do not get up to speed quickly.
- b. There is no comprehensive training for Service people.

7. SYSTEMS

- a. We have to clear too many decisions with head office.
- b. Head office decisions take too much time.
- Head office takes a long time to release funds and pay invoices.
- d. Head office does not budget for training people.
- e. Sales and Project Management do not communicate well.
- f. Service is not delivering what Sales is selling.

their upgrade. Her concern that the proposed business innovations "are not in sync with what our clients want" reflected her resistance to change and her disregard for Q Insurance's changing requirements. She also seemed oblivious to the fact that Q Insurance had been voicing serious complaints.

Cheryl's resistance was understandable. For a few years now, she had been making a very nice living with this one major client by renewing annual service contracts, maintaining a long-standing relationship with them and arranging for growth and upgrading to a system firmly in place. However, whether she realized it or not, the writing was on the wall. Q Insurance's systems were in need of a complete overhaul and Datastore was coming up against competitors who had more to offer. In order for them to choose Datastore, Cheryl would have to get into the business of consulting.

Next, it was time to categorize the issues. At this stage, categories emerge logically and everyone tends to agree on their placement. Issues that are seen to be duplicates are deleted by consensus and a useful set of notes emerges. In this case, it was a focused, collaborative effort in which the lines of communication were open and everyone was heard. While we took a break, the notes were printed and distributed.

DATASTORE CHALLENGES GET PRIORITIZED

A. CHALLENGES

- 1. SERVICE AND PROJECT MANAGEMENT
- 2. FINANCIAL
- 3. SALES
- 4. HUMAN RESOURCES
- 5. EXISTING BUSINESS
- 6. BUSINESS DEVELOPMENT
- 7. SYSTEMS

GOALS/VISION An Epiphany Becomes the Vision

Now that the challenges had been dealt with, it was time to look to the future. In previous years, we had looked at Datastore's long-term vision but since they were struggling, it was important to set some immediate goals. Back we went to the flipcharts to fix the broken vehicles they had drawn that represented the current state of the company. Looking back from the future, this time, each group drew a picture of a united team moving forward on board a smooth-sailing ship, a bus full of money and an airplane taking off with happy faces looking out of the windows.

Picking a date six months in the future, the task was to envision themselves enjoying their work and the success of the company. "We still exist!" "An earthquake destroyed head office." Ooch!

Lenny went first. "I am happy because we are so well organized that we are managing all our projects in a realistic timeframe instead of juggling crunches all the time. And they are all the right projects. As we are finishing offsite setup, we no longer find out that what the client needs is something entirely different. Or like Z Retail, that the new tracking system doesn't work with their archiving system."

A discussion followed about what would be required to make this happen. Consulting would have to be on top of it. Consulting, Sales, Service and Marketing would have to communicate clearly and be of one mind. Everyone was in agreement on this point, and the goals started flowing freely. Marketing has a fresh, new global image that is focused on consulting and security systems. Data retrieval speeds are the fastest in the business. The budgetary red tape with head office is gone.

The timing was right for Steve to present his new business development plans. He led by venturing forth with his contentious desire that everyone buy into an offshore partnership without feeling threatened by it. With confidence, he explained the advantages of offloading certain parts of the business at a fraction of the current cost. It would be a *different* model, not less business. "You're not getting fired, you're getting help." His team listened, asked questions, offered opinions and finally the goal went up on the screen.

Steve then unfolded his vision of the expanded role of consultants in the company. He saw them as a hybrid of Sales and Service and also as a liaison between the two. He explained the lucrative opportunities in consulting and invited everyone to consider stepping into the role. This vision was taking on an interesting shape, molded by an enthusiastic team.

DATASTORE GOALS GET LISTED

It is now June, six months since our strategy meeting. We are happy with our business.

1. We are managing all our projects on time.

All our projects are the right ones. We have the perfect clients benefiting from what we do best.

90% of our employees have been with us for at least six months.

Sales are up 7% from last year.

Feedback from clients is positive.

Q Insurance is running smoothly.

Q Insurance is working with our consultants on a new security system.

Consulting, Sales and Service are communicating well and are of one mind.

Our real time/historical data system has been developed and is now the fastest in the business.

Marketing has developed a global image featuring consulting and security systems.

Our data retrieval is the fastest in the business.

Financial arrangements with head office have been streamlined and financial transactions happen quickly.

We are partnered with an offshore company for data storage.

We have 2 new consultants.

We have 3 new consulting clients.

Our Beta project with Z Retail is underway.

We have retained all our major clients.

Some animated technical shop talk followed from which emerged a few more goals. "We have retained Z Retail and they are thrilled with us," (followed by a few chuckles). Then, just as I was thinking about breaking for lunch, out came the epiphany. The group had been doing a brief, informal post mortem on the recent disastrous system installation for Z Retail from each of their perspectives. They speculated on damage control.

"How about making them a beta site?" was Lenny's "Eureka."

There was a moment of silence followed by rumblings of "What a great idea." "It could work." "Think of the money we'd save," etc.

A Beta site is apparently a willing volunteer that allows you to test new products and services in their final stages of development in exchange for low or no cost and preferential treatment. Sales liked the idea because the freebee would appease their disgruntled client. Project Management liked it because it was short, sweet and manageable. Consulting liked it because they could try out their stuff and get feedback. Marketing liked it because it was a free, sophisticated focus group. Steve liked it because this global retailer would provide leverage with prospective offshore partners. Everyone liked it because it would be a team effort and a great exercise in keeping the lines of communication open.

After four hours, the Datastore team were old pros at categorizing and prioritizing. With goals established, the well-earned lunch break would give them the sustenance they needed to come up with an action plan.

The Winning Team

Though I have witnessed many components of The Plan that work miraculously, after all these years I still cannot say for sure how or why this is so. For example, I know that seeing thoughts projected onto a screen has a transformative effect but I am not sure exactly why. At this juncture in the Datastore meeting, another magical

DATASTORE GOALS GET CATEGORIZED

1. SERVICE AND PROJECT MANAGEMENT

- a. We are managing all our projects on time.
- All our projects are the right ones. We have the perfect clients benefiting from what we do best.
- c. Feedback from clients is positive.
- d. Q Insurance is running smoothly.
- e. Our data retrieval is the fastest in the business.

2. HUMAN RESOURCES

 a. 90% of our employees have been with us for at least six months.

3. SALES

- a. Sales are up 7% from last year.
- b. We have retained all 80% of our clients.

4. BUSINESS DEVELOPMENT

- Q Insurance is working with a consultant on new security system.
- b. Our real time/historical data system has been developed and is now the fastest in the business.
- c. We are partnered with an offshore company.
- d. We have 3 new consulting clients.
- d. Our Beta project with Z Retail is underway.

5. THE TEAM

- Consulting, Sales and Service are communicating well and are of one mind.
- b. We have 2 new consultants.

6. MARKETING

 Marketing has developed a global image featuring consulting and security systems.

7. SYSTEMS

a. Financial arrangements with head office have been streamlined and financial transactions happen

transformation had taken place. The strong and weak links of the team had unmistakably emerged and potentially contentious issues had resolved themselves. Lenny, who worked daily behind the scenes as the "techy" Project Manager, had come to the forefront as a valuable resource and leader.

Cheryl, on the other hand, had faded into the background and subtly it had become apparent that she was not a fit on the emerging team. Still, there was a friendly atmosphere in which she was marginally participating in the meeting and engaging with people during the breaks. My guess was that she would soon choose to move on. The team that had formed without her had a common vision of where they were going. Our next task was to get them there.

DATASTORE GOALS GET PRIORITIZED

B. GOALS

- 1. BUSINESS DEVELOPMENT
- 2. SERVICE AND PROJECT MANAGEMENT
- 3. SALES
- 4 THE TEAM
- 5. MARKETING
- 6. HUMAN RESOURCES
- 7. SYSTEMS

Aligning Challenges and Goals

Before categorizing and prioritizing goals, consider their connection to the list of challenges. The continuum is that in Stage 1 we offload challenges and by doing so we are able to set goals in Stage 2, which will be applied in the action plan in Stage 3. For this to happen logically with nothing left out, we check to make sure that there is some alignment between challenges and goals. Before pronouncing the list of goals complete, we quickly go through the challenges to make sure that all the necessary connections have been made.

Typically, we try to use the same categories for both stages if it works. For example, the challenges, "All our projects are behind schedule" and "Q Insurance complains about Service on a daily basis" are connected to the goal

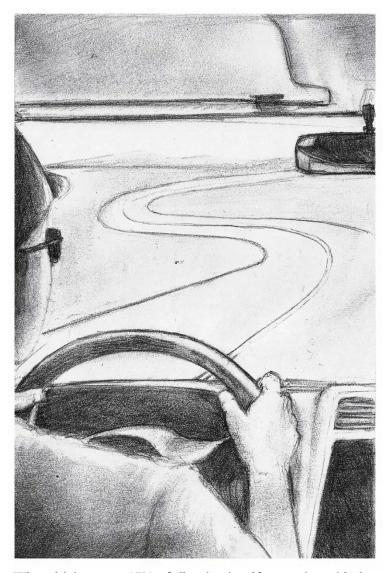
"All our projects are on time." From this goal, an action will be set with no need to review the challenges.

This goal fits nicely into the category "Services and Project Management" used in the challenges stage. However, this is not always the case. During the process of setting goals, brainstorming often produces solutions to problems, and we find that an old challenges category does not accommodate new goals. Furthermore, in looking back from the future, fresh goals require additional categories.

From the future, priorities change as well, and The Plan adapts accordingly. For example, notice that the category B. FINANCIAL ranked high in challenges but was eliminated as a goals category. This is because the financial challenges, when viewed from the future where they had been dealt with, fell naturally to the areas that provided the solutions. "Head office pays attention to the bottom line..." a financial challenge moved to the SYSTEMS category when the goal of "arrangements with head office have been streamlined" had been set. Similarly, the offshore financial paranoia transformed into a BUSINESS DEVELOPMENT Goal, and THE TEAM and MARKETING were added. Envisioning solutions to financial problems promoted the development of long-term, strategic plans in income-producing areas.

While alignment ensures that goals are set for all challenges, flexibility is equally important in the exercises of categorizing and prioritizing. We do it quickly, creatively and with consensus. Checking for alignment, we can set actions from the goals list, confident that challenges are dealt with as well.

Challenges Categorized	Goals Categorized
A. SERVICE AND PROJECT MANAGEMENT B. FINANCIAL C. SALES D. HUMAN RESOURCES E. EXISTING BUSINESS F. BUSINESS DEVELOPMENT	A. BUSINESS DEVELOPMENT B. SERVICE AND PROJECT MANAGEMENT C. SALES D. THE TEAM E. MARKETING F. HUMAN RESOURCES
G. SYSTEMS	G. SYSTEMS



When driving a car, 97% of all action is self-correction with the destination in mind. Making your way down a winding path, you need to adjust and readjust the wheel monitoring your driving depending on the other drivers, the surroundings and road conditions. It is the same with strategic planning. You need to know your goal, constantly heeding any changes and adjust accordingly to achieve your goal.

ACTION!

"Each (person), according to his own inclination follows his own purpose, often in opposition to others; yet each individual and people, as if some guiding thread, go towards a natural but to each of them unknown goal; all work toward furthering it, even if they would set little store by it if they did know it."

Immanual Kant

he action plan is the whole point of the exercise. It is what you walk away with to guide you into the future. Execution and accountability head the list of what most leaders are looking for in strategic planning. With the clutter out of the way and the goals clearly defined, you are now able to take the first step, put one foot in front of the other and march towards your vision. In Anna's action plan in Chapter 1, the two steps she planned started a whole new career, without which she was lost.

On the downside, I often hear that the disenchantment with planning meetings comes from poor results—nothing changing or getting accomplished afterwards. Following a great retreat where everyone shares a vision and sees their way clearly to manifesting it, a fire grabs the focus, a deadline that you set gets postponed, you land a new contract that you never expected, a new government regulation comes along and so forth. The vision fades like a dream when you wake up and in the midst of your busy life, it is impossible to recapture.

Using The Plan, you leave the meeting with tangible, step-by-step, bite-sized pieces on paper, in your day-timer, witnessed, and you have a back-up plan. The challenges and goals that you have worked through are put in motion by three components—an action, who will do it and when. It is flexible and it can change, but the action plan that emerges from the meeting gives you a solid foundation to build upon.

Many meeting formats are effective in dealing with issues, creating and strengthening teams, bringing out the best in each player and spawning new ideas. Unfortunately, without a plan of action, all that energy dissipates after the meeting and people end up feeling that they have wasted their time. Staying true to our method of dealing with challenges first, let's take a look at a different kind of meeting and its outcome.

Somewhere Over the Rainbow – Brainstorming with Storyboards

The length of the credits at the end of a movie always amazes me. So many people in a vast array of specialized teams work for a year or two to make an hour and a half film. The planning logistics that must go into this are very impressive. That being said, planning meetings for creative projects have a reputation for falling short when it comes to action plans.

A friend of mine, Art, who has a very successful advertising agency in Vancouver, told me about some of the meetings they have conducted for coming up with creative ideas. "They are very high energy, very exciting but I have to admit that follow-up is a problem. You leave the meeting feeling exhausted and exhilarated with armloads of rolled up flip chart sheets, wondering how you're going to start acting on all the great stuff that happened."

He went on with his story. "Last year we landed a new coffee shop franchise company just breaking into the market. Their indies have done very well in the downtown neighborhoods and now they were franchising out to the 'burbs and malls. They wanted to start with some TV spots. We were ecstatic about getting the contract but we freaked out when we found out how little time we had before their new shops were to open."

Art decided to hold a brainstorming meeting as he had done in the past with varying results. "It was a good contract and my partner Kelly and I decided to go all out. We rented a meeting room for two days in a comfortable hotel with a great view and good food. Our team consisted of nine people, six of our employees and three people who work with us on contract.

Our objectives were clear. We wanted to solidify a good, bonded working team and to come up a maximum of great ideas. We were also really banking that by the end of the second day, we would have a storyboard. But since I didn't want a deadline to roadblock the raw quality ideas, I didn't spell this one out."

Squeezing the Creative Juices

Art's meeting started out with a good, connected feeling and as both the meeting leader and part of the creative team, he felt he was in control. "I needed some structure to keep everyone involved but not enough to box in ideas or switch the focus from the project to the meeting itself. I went over the objectives that I had written on a whiteboard and laid out the ground rules: no rules, no bad

ideas and no criticism. After an informal go-around which including wise-cracking, a song and some deep-breathing, we broke into groups and got down to it."

Very animated, he portrayed a day of grouping, drawing, gathering around in a circle, sharing ideas, writing, word play, paper flying off flip charts, music clips, regrouping, adding ideas to the whiteboard, working and reworking from which emerged the idea: *It's just coffee*, a theme which was evolving into a very funny parody of dating practices. They had struck the right chord.

Though they did reach their goal, Art describes the meeting as "a grind." He found it difficult being both the leader and a participant. "I had to reassign groups and make sure our contract animator was involved when what I really wanted to do was sneak off into another room with Kelly and stay there until we came up with some great copy."

Storyboarding – The Cartoon Version of the Action Plan

In the language of The Plan, what had happened so far in Art's meeting was that the goals had been identified, the issues had been dealt with, and now it was time to look ahead. The challenge was to come up with the idea for a TV ad to meet the goal of airing by a certain date. Now that the idea had emerged, they had arrived at the action plan stage. Whether you are planning a website, a merger, a wedding or a TV ad, the time comes when you have to plan step one. Art's action plan of choice was the storyboard.

Invented by Walt Disney, storyboarding, as Art explained it to me, is a tool which turns a script into a movie by sketching each frame to be shot in sequence. It looks like a comic book. Each frame depicts the shot and describes the camera position, for example close-up or headshot. Alfred Hitchcock apparently never strayed from his very detailed storyboards, and the Coen brothers take their storyboards to potential financial backers before the decision has been made to even make the movie. Currently storyboarding is used in many industries including

manufacturing, but is largely the domain of creative projects. While Art finds it to be a useful tool among many, he has colleagues that swear by it.

Fast forward to the end of the retreat. In the final group gathering, everyone expressed tremendous feelings of accomplishment, exhilaration, team spirit and clarity. The toughest creative decisions had been made and everyone loved the concept, the artwork and the direction that the ad was taking. Art and Kelly exited the hotel with the storyboard etched on rolled-up flip chart paper, satisfied that the job had been done. They looked forward to a weekend of recharging and drinking tea.

On Monday morning, symptoms of postpartum depression began to set in with the first phone call of the day. "You know the drawing of the cocktail glass full of coffee that we tossed? I'm having second thoughts about it." "I have a conflict with another project and I have to push this one back a little."

Art himself was getting stuck on his first task. In the throes of creativity, the whole area of test marketing had escaped him. This is something which needs to be considered from the beginning. And of course another major client wanted some additional changes which would alter their tentative schedule. When he checked with Kelly, she was doing some damage control on another project and they were both finding that the retreat was fast fading into a distant memory.

After some initial chaos, the ad aired on time, it was a huge success and a great client relationship had begun. Of course their Project Manager had come on board and all the teams got down to work. "But it wasn't easy and I can't help feeling that we wasted a lot of time and effort by not planning it right."

Just for fun, we tried to figure out what Art's plan would have looked like in The Plan format. We began by creating a grid that looked like this:

Challenges	Vision It is now May 1	Action Plan –Who? The next 30 Days
We do not have any ideas for a TV ad.	We are very happy that we have created a great TV ad.	Hold a brainstorming meeting <i>AL-12APR</i> - Create a storyboard- <i>TEAM</i>
We do not have a bonded team.	Our team worked well together.	Hold a brainstorming meeting <i>AL-12APR</i> - Break team into groups Do group exercises Foster communication. Do follow-up- <i>AL</i> , <i>KL-DAILY</i>
We have only one month to air the TV ad.	We met our deadline.	
Our budget is only \$x.	We met our budget.	

We have a contract

marketing campaign.

for the whole

branding and

ART'S PLAN TO PLAN - Jan. 1

The First Step

marketing campaign.

We have not solidified

complete branding and

our contract for a

What is wrong with this picture? There are blanks in the Action Plan column! While Art's meeting had achieved its purpose of creating a bonded team and a storyboarded TV ad, no one knew their next step. "It seems so straight forward when you are in the meeting. But we get so caught up in the creative process that we don't even consider stopping to focus on a to-do list. It just wouldn't fly."

As any number of wise sayings can attest to, the first step is crucial. The first step on the moon was indeed a giant step for mankind and a long journey does begin with one step. On a large project, creative or otherwise, you can make life much easier if the last thing you do before packing up for the day or taking a break is to plan what the first step will be when you come back. That way, after lunch or the weekend, you pick up where you left off when the way was clear rather than wasting time reorienting yourself.

Art's Brainstorming Meeting - Take Two

Art and I looked at what could be done differently next time. The brainstorming format suited his needs and he was pleased with the results. His only frustration was that it lacked an action plan. "I've thought of videotaping meetings but then someone would have to watch all the real-time footage which would be time-consuming and boring. I don't think we would be any further ahead with the audio transcript or photographs of storyboards. We've tried all these things to some degree and they just don't capture it. When we come back to the project, we still feel that we have lost some of our direction."

My first suggestion was that Art consider hiring a facilitator. It is possible to plan effectively on your own if you are working with only a few people, but I have found that with five or more it is difficult. Art had found that by being both the leader and a key creative player, it was impossible to bring the meeting back to a structured format at the end of the day. "I was too involved in the creative process, too pumped to focus on concrete planning."

"If you had to pick one role or the other, which would it be?" I asked.

"Creative guy," was his immediate response.

We speculated on how a facilitator could help. With minimal structure, the issues and goals would be recorded in the early part of the meeting before the creative juices started flowing. Also, all the chores of time keeping, teambuilding and creating an action plan would be off-loaded.

What I had also heard in Art's story was that the team that appeared to be on-board and connected during the meeting had started to show signs of unraveling by Monday morning – "I have another project"; "I think the picture we tossed was really good" and so forth.

Why hadn't they spoken up in the meeting? In my experience, it is easier for people to voice concerns to an objective outsider than to their own employer or manager where there may be hidden or overlapping issues. This objectivity also benefits the manager. If the point of an off-

site brainstorming meeting is to get fresh ideas, relationship issues and organizational politics are best left behind. Perhaps the drawing that had been tossed really was good but the manager/employee dynamic had inhibited the artist from speaking up.

Finally, taking the time to create a thirty-day action plan would have left no room for second guessing: (a) because in the step-by-step process of putting the wheels in motion, any doubts would have surfaced; and (b) the commitment of each participant to their next step would have been a witnessed reality check. The actions they signed up for would be on the screen for all to see. "Joe, you have six actions for the same deadline. Do you really think...?" This happens frequently in meetings.

When we deconstructed and reconstructed the problem of follow up, Art agreed that a fresh, objective "next step" session at the end of the meeting could have worked. While his initial plan to brainstorm ideas and build a team had been successful in many respects, it had failed to create a road map to their goal. Art and I came up with a simple example of how an action plan might have emerged.

A. Challenges

1. We do not have any ideas for TV ads. We do not have our team in place.

B. Goals

It is May 30th and we are happy.

- 1. Our fantastic TV ad has aired.
- 2. Everyone loves our ad.
- 3. Our team worked really well together hitting budget.
- 4. We met our scheduling targets.

I may have asked Art this question: "What is one thing you can do to make sure everyone loves your ad?"

Answer: "Arrange a focus group." Then I would have asked about the team-building step, who would be responsible for it and how it would work?

C. Action Plan - 30 Days

- 1. Arrange for a focus group-AL-Monday, Feb. 23
- Call Joe White at Viewer Vision to discuss the scheduling process.-AL-Monday, Feb. 23
- 3. Email everyone present.-KL-Monday, Feb. 23
- 4. Set up first meetings to discuss.- KL-Monday, Feb. 23
 - (i) Budgets
 - (ii) Schedules
 - (iii) Project management

Art concurred that these steps alone would have pointed them in the right direction. He speculated that a go-around clarifying each participant's next step would easily have followed. Slipping into ad-speak, he identified the first technical steps and who would have signed up. He felt that a little accountability would have gone a long way.

What We Learned About Action from Art's Brainstorming Exercise?

In order to enhance the flow of creative ideas, comfort and minimal structure are key. The challenge is to impose enough structure to produce an action plan.

Both managing a meeting and being part of a creative team makes it difficult to elicit next-step commitments from the team and its participants. With five or more, using an outside facilitator is an effective way to ensure that an action plan is produced.

At the very least, make sure you plan a next step for each participant before ending your strategy meeting.

The Action Plan Road Map

Now that we have looked in on the brainstorming meeting that did not lend itself easily to effective action planning, let's examine how The Plan delivers accountability. Simply put, you take your aligned challenges and goals and turn them into scheduled, committed, realistic actions. Obviously, a one or two-day meeting cannot set down every step to a strategic plan, but it does lay the foundation. In fact, the action plan can be exported into

project management, spreadsheet and mind mapping software. The action plan can be revisited as often as you need to, actions can be checked off when completed, steps can be added and dates and people can be changed. The key is to build steps in a way that is actionable. The action plan becomes your to-do list and collective commitment.

Aligning the Three Stages— Like a Chicken Laying an Egg

With your challenges and goals aligned, the action plan falls out naturally like a chicken laying an egg. After listing, categorizing, prioritizing and aligning your issues and your goals, creating an action plan is simply a matter of going down your goals list and planning appropriate actions.

Planning Ahead—How Far?

While your vision could extend far into the future – I've heard of a Japanese company that crafts a 500-year plan – the action plan works best in bite-sized pieces. Sixty or ninety days ahead into the foreseeable future works best. This is a realistic time frame that gives you a good start. Think of it as making a plan to plan.

Challenges or Goals— Which List Works Better for Creating Actions?

Since the function of the challenges stage is largely to get them off your mind, your goals are what prompt you into action. Planning back from the future, it makes sense to take your vision and put it into actionable steps. However, you may want to take a look at your challenges as well to see if you missed anything when you aligned your challenges and goals. For example, if your issue is that your current marketing methods are not effective and your goal is to get fifty new clients, this would prompt you to take a step towards finding a new type of marketing. Your actions might be:

- 1. Trace the source of new client business. -PS-2APR
- 2. Review search engine optimization on our website. -AR-2APR

How to Build an Action

There are three pieces of information in an action: what to do, who will do it and by when.

THE ACTION

- Relate the action to a goal on your list.
- Start with a verb.
- Plan either the first step or one thing you can do.
- Envision yourself doing it.

Be specific and clear. Don't be vague about how to proceed but on the other hand, avoid getting bogged down in all the details. Some discussion on how to go about accomplishing your goal is helpful if it is directed towards the step that will get you started. Also, make sure that what you state will be clear when you revisit it.

In our scenario for finding the best marketing routes to new business, you may be tempted to list all the steps that were discussed in figuring out what has worked best in the past: (a) go though client contact database, (b) call clients and ask how they heard about us, and so forth. But what is more useful in your action plan is simply; **Trace the source of new business**. When you get back to the office, you will know what to do and you will probably have thought of a few more tactics. Moreover, you will not be overwhelmed by details either during the meeting or when implementing your action plan.

WHO

This is where you commit to action. Your initials go right next to the stated action. Some tips before you sign up:

- Only make promises that you can keep.
- Ask for help if you need it.
- If WHO is TEAM, pick a leader.

Commitment is the key to planning success. Accountability is the number one concern of leaders, now

more than ever since we have seen top executives go to prison for crimes committed on their watch. Initials beside a task may seem insignificant but there they are on the screen for all to witness.

As the final stage of the meeting, the action plan has a way of putting all the cards on the table. Pay attention and you can learn a lot about your team, its players and dynamics. Who delegates and who takes everything upon themselves? Who is committed and in for the long haul? Towards the end of one large organization's annual retreat, I had to point out to a VP that what he had taken on was not humanly possible unless he gave up sleeping. Another key player was conspicuously absent.

WHEN

When will your action be completed? Action is about getting things done, momentum towards your goal. The actions of the next sixty or ninety-day increment, whichever you decided on, set the pace for manifesting your goal. Can you do it? Do you need help? More tips:

• ONGOING is not a free procrastination ticket. It should include the increment—such as weekly, monthly or as needed—for revisiting the task. For example:

Check publications weekly for articles on ecotourism. -RM-ONGOING

 Be realistic. If you haven't worked out in two years, don't commit to going to the gym 3 times a week starting tomorrow.

It's Alive! Revisiting the Action Plan

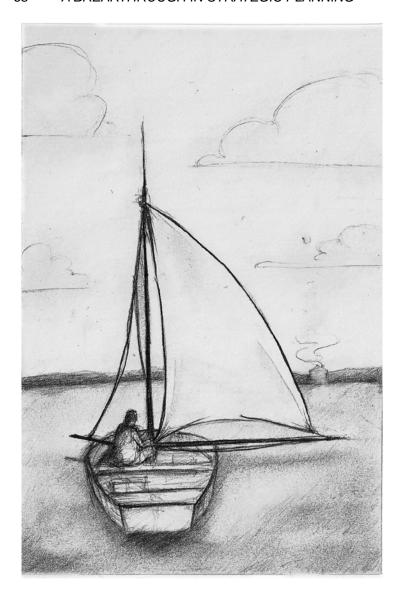
By creating an action plan, you begin to manifest your goal. Revisit it to plan further action, adjust completion dates, reassign tasks, rework them and keep moving. You may want to schedule a follow-up meeting focusing on the action plan. This could be facilitated or not, either in-house with your team or on the Internet.

When you leave the meeting, you can easily incorporate the action plan into your schedule. You have it on paper and it is also sent to you by email in a format that

can be uploaded into a spreadsheet, project management or mind mapping software. You can simply refer to the hard copy, enter your actions and completion dates in your day timer or convert it and export it into other programs.

As an Excel spreadsheet, converted easily into three columns, you can sort by action, person and date. This is useful for large meetings and long action plans. It can also be expanded to include such fields as COST and COMPLETED. New actions can also be added as time goes on.

If you can't live without it, upload the action plan to your handheld Palm device or Blackberry. If Mind Jet is your tool of choice, you can add the Word or Excel format to an existing plan or create a mind map using the action plan as a guide. Use whatever works best for you and keeps your action plan evolving until you have reached all goals.



To sail from here to a specific destination, you must deal with the wind, water and crew. 'Tacking' is the self-correcting you must do to keep on track. Implementing a strategic plan has the same parameters. You must deal with the economic environment, the internal environment and your team to achieve your goals.

USING A FACILITATOR

GOOD WORKMEN HAVE GOOD TOOLS

here is an old saying that a poor workman blames his tools. Maybe that is because he really does have bad tools for whatever reason. The opposite, then, would be that a good workman raves with praise about his tools. A good workman makes sure that he has all the right tools, in good working order, at his fingertips, to get the job done.

The Plan is a great tool that comes in a few different sizes and models with a kit full of just the right add-ons. All you have to do is decide on which best suits your planning needs. Can you do the job yourself on your computer or do you need someone to help you out? Is your team small and connected enough to pick a leader and execute The Plan effectively yourselves, or do you need a facilitator? Can you meet over the Internet, with or without a facilitator, or do you need to connect in person? The section on Internet meetings in Chapter 6 helps you make an informed decision.

Now, let's take a look at some of The Plan tools and tricks of the trade, starting with the facilitator.

Make It Easy With a Facilitator

When does someone call in a facilitator? When they want to make it easy. *Facil*, the root of the word, means *easy* in Latin. That's what we do. We make the planning process

easy. If you are too close to an issue to be objective, make it easy by having a facilitator approach it from afar. If you have to wear too many hats as Art did, acting both as leader and creative brain-stormer, make it easy by passing one of those hats to a facilitator. Concerning the number of participants, I have found that five or more becomes difficult for a team member to lead. With fewer than five but the wrong people – reluctant participants or a disjointed group that has to come together – a facilitator makes it easy.

The Small, Disconnected Group Decides to Make it Easy

The small group of wrong people that jumps to mind is – let's call them the Greens, made up of Professor Forest Green, his wife Violet Green and his brother, Basil Green. By "wrong people" I mean wrong for taking their project to the next level. They are wonderful people who are responsible for a planet-saving achievement, but they had reached an impasse and needed help.

In our preliminary meeting, Violet explained their need for a facilitator. Well ahead of his time, Professor Green had spent decades inventing a fuel alternative to gasoline. Tests had been done at the university and government levels and the time had come to take the invention to market. The demand had never been greater and they possessed the product and the means to supply it.

Though their team had functioned well during the development phase of the product, they were unable to jump the next hurdle. Over the years while the Professor worked in his lab, Violet took care of the finances and Basil worked the practical side by applying for grants, arranging sample testing, tracking the marketplace and building a network within the research community. But the Professor's never-ending attachment to the theoretical, intellectual world and his total lack of business sense were driving his wife crazy. Furthermore, his brother who had managed the business end realized that the time had come to act quickly; also that he did not possess the business acumen for taking the product to the mass market. The potential for success

and the huge financial benefits awaiting them had been confirmed on many levels, but they were completely blocked from seeing their way clear to making this happen.

Secrecy was another major issue. Within the academic/public sector there had been discretion, but with the prospect of bringing the invention to the commercial market, their fears of having it stolen or blocked and of making bad business decisions were completely justified. There are countless stories of creators of great works dying penniless in obscurity.

I began the meeting with some informal ice breaking, followed by Violet's recap of their current situation and some contributions from the other two participants. From the beginning, my work was cut out for me. As the Professor tended to ramble on and not listen, his wife became increasing hysterical and his brother more withdrawn. Clearly, my job was to get them to communicate, which the process itself took care of to a large extent. Launching into listing the challenges, the process of framing words into succinct, projected notes had the effect of paring down the Professor's convoluted thoughts.

The Plan by design also required him to speak in turn and to see what the others meant – literally – on the screen. Brain research tells us that it takes a few seconds of focus to turn a real moment into a memory. As the theory goes, one reason for not being able to remember a traumatic event such as an accident is that your attention is so diverted while it is happening that there is no few-seconds focus in which to form a memory. Having trouble remembering where you left your glasses? Focus for a few moments as you envision moving your glasses from your hand to a surface and a memory will form.

Similarly, a key ingredient in The Plan's formula for success is this "forced focus" as I call it, when spoken words become a note transcribed and projected onto the screen. Forced focus is a great tool for breaking resistance, one of the biggest obstacles to planning. Resistance creeps in everywhere. It includes the activities of making hand-

written notes and talking aimlessly on without coming to the point.

As the challenges were unloaded, the Greens' tensions eased and they started connecting with each other. In this case, though they were not overtly hostile, a referee had been long overdue. Their list of challenges was extensive and many were at cross-purposes.

The Professor's issues were scientific and he was not concerned in the least about financial or business matters. His biggest challenge was along the lines of, "The University's last test indicated that different combinations of grains could produce a more efficient yield."

His wife, on the other hand, was challenged by the finances. "I am sick and tired of managing debt when we have worked so hard. We're sitting on a gold mine!"

Basil was anxious about the need for action while being cautious. His first challenge was, "We can't seem to figure out how to take the right steps at the right time with the right people."

We pressed on until the consensus was that the chaotic list was complete. Reading each challenge aloud in turn, I had the feeling that they were hearing each other for the first time. As Forest slowly read his wife's words, "I am sick and tired of..." a feeling of calm came over the room. I imagined that she had said this to him thousands of times while he tuned her out. Now he had to focus. To everyone's relief, the issues fell neatly into the categories of Business Decisions, Finance and Personal, and all agreed on the priorities.

Not surprisingly, the discrepancies in the Greens' challenges were paralleled in their goals. Though there was a common desire for success, each wanted something different. Luckily, by this stage everyone was calm and connected.

We picked a target of a year in the future, envisioning their dream beginning to manifest. The Professor's dream was to keep on inventing. After twenty years of developing *the* product that could replace gasoline, he felt he was just getting started. The pay-off meant

nothing to him. It would be like asking the Wright Brothers to stop and market the first airplane when what they really wanted was to get on with inventing a jumbo jet. His stated goals were, "We are working on a way to process the byproducts at the source." "In collaboration with Provincial governments, we are now examining the impact...."

Violet, on the other hand, was looking forward to the end of their financial struggle and to enjoying the fruits of their labor. Understandably, she wanted to cash in expediently and my sense was that she would leave her husband if he did not take steps towards this end. Her goals were, "We are out of debt." "The product is now being sold and is doing very well." "We are going on a cruise."

Basil's dream was for a business success in which he had played his part well. Somewhere between Violet's wish to move on and the Professor's vision to keep on inventing, Basil's desire was to be instrumental in the global commercial success of his brother's invention. As a successful businessman in his own right, so far he had done well maneuvering in domestic markets within a familiar territory and network of people. But, as he had expressed in his challenges, to take the product global, he would have to navigate uncharted waters, which he did not feel he was equipped to do. His goals were, "We have found the right people to take the product to market." "We are happy with the deal we have struck." "We managed to ward off all threats." Also, "We are going hiking in the Himalayas," indicating a well deserved reward.

Buy-In: The Reason for Meeting

The goal of a meeting and the role of the facilitator hinges on buy-in. Where is the common ground? What is the consensus? Who is the leader? In order to plan ahead, you have to start with one common purpose. Do all the participants at the meeting want a perfect wedding day or a great series of TV ads? Let's hope so. If not, there is bound to be resistance.

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Part of my job description is to connect or reconnect a group with buy-in. In the Datastore meeting, the new leader Steve was looking for buy-in on developing the consulting side of the business. Everyone signed up except for the Sales rep Cheryl who was simply not interested, and the new group constellated without her. As we saw, while this was difficult for Steve to launch in the workplace setting, a facilitated meeting made it easy. The Greens could not move forward because they had neither consensus nor leadership in their decision-making and therefore no buy-in. The Professor wanted to keep on experimenting, Violet wanted to sell to the highest bidder and Basil wanted to protect and nurture the business.

As always, the action plan was the easiest part, following logically from the goals. The action that the Greens all agreed on was to let go. Here was their rudimentary buy-in. They had to find a company or an individual to take their product to market for them. Even the Professor agreed. Once this was decided, they knew what their next step was, or in this case who to call. Within their circle was a very well connected, trustworthy energy consultant. Basil would contact him within the next week. With the help of a facilitator, the team was able to come up with one action.

Of course, the real test of buy-in is follow-through on the action plan. The Greens did make progress following their meeting. There is serious interest in the product, they are happy with their New York consultant, Violet is ecstatic that the Professor found a related but *new and different* project and they have achieved their goal of moving on.

A facilitator, like a midwife I suppose, makes planning easy but in the end it is the client's baby. They are the ones who reap the benefits. Or not. The tools I use for buy-in are The Plan as we have seen, listening, making sure that everyone is heard, connecting the participants and making order of chaos. In this environment, buy-in or its conspicuous absence evolves.

At least I think that's how it works. Facilitating is my life's work. I love it, I love people and I have been doing

it for so long that even though I am conscious of some tools and techniques, often the process seems to roll out naturally.

A compliment I have received from one of my team and also from a long-standing client may sum it up. "Ron, you are like everyone's favorite high school teacher. Your enthusiasm is contagious, your class is lively and fun, you are interested in what everyone has to say and you strike just the right balance of control and freedom. Everyone works hard and there is always a level of mutual respect."

How I Became a Facilitator

It all began about ten years ago when I realized how much I love talking to people and helping them. At this stage in my life I had been involved in many different careers and businesses, all very people-oriented. I loved teaching at University, acting in theatre, sales and making deals. At a crossroads, one day while I was doing demonstrations of water filters in a department store, I ran into my old friend Roz who had started an airport limousine service. "Why don't you come and work for me?" she asked. "You grew up in the car business and you're an excellent driver." I started the next day.

This job was perfect for me, a combination of two things I love to do: drive and talk to people. Everything was great until Roz said, "By the way Ron, please don't talk to your passenger unless they talk to you first. It's unprofessional."

With great difficulty I obeyed the rule, as interesting people who were travelling all over the world sat behind me chatting to each other, reading the paper or doing work. It was so difficult for me to be quiet that I really had to be strict with myself, allowing only for hello's, good-bye's, thank you's and the occasional "Have a nice day," or "Nice weather we're having," if I was feeling rebellious.

One day, driving away from the airport I looked in my rear view mirror at the young businessman in the back seat, little knowing that we were about to change each other's lives. As usual, we started our hour-long drive in silence. About twenty minutes later, my passenger said, "New York is a fantastic place. Have you ever been there?"

I will never forget the overwhelming feeling of joy and relief at being able to lift the restraint that was so unnatural to me. We started talking and cracking jokes and having a great time. Within a very short time he was opening up to me about all sorts of things. He had a young family, he had been a football player and now he was the Vice President of an international company that manufactured technical equipment.

By the time we arrived at Don's house (of course we had introduced ourselves) he was telling me about some problems he was having with his team at work. "Actually, we are on shaky ground. New York is ready to cut us loose if we don't meet our metrics this quarter." I parked in front of his house and we continued the discussion for another half hour.

Listening very carefully to him and asking a few pointed questions, I came up with a solution. "Have you ever heard of The Business Huddle?" I asked. He hadn't, but being a football player, he liked the name. David Talbot, a systems engineer, was very successful at running strategy meetings and had created The Plan. I explained to Don that in less than a day, he and his team could sort out their challenges and walk away with an action plan. Within a month, they held their first Huddle, they hit their target for that quarter and they have been clients ever since.

For me, the turning point was discovering how much I loved talking to people and helping them. When I looked around at my life, I realized that I did this all the time with my family and friends and through my ongoing personal growth work. Shortly after that, I started working with The Business Huddle doing sales, marketing and preliminary meeting planning with clients.

As I mentioned in the Introduction, using it myself to plan my cousin's memorial service and standing in for David one day when he was sick sealed my fate as a career facilitator. Strategic planning was the most natural calling in the world to me, the meeting was a success and the rest, as they say, is history.

Ironically, David gave up facilitating shortly after I began. We had worked together for seven years. His engineer's mind had brilliantly invented The Plan but by his own admission, he was not a people person. Though his clients can attest to The Huddle's huge success, working with people was not what David enjoyed doing. He and I have always maintained that it took an engineer to come up with the system and a people-person to make it work.

The Preliminary Meeting Tool

Soon after I have been hired to facilitate a meeting, the client and I hold a preliminary meeting which serves many uses, both practical and strategic. This is where I get a feel for the organization, its culture and people, and work with the client to lay the foundation for the meeting. The meeting sponsor or core team and I get to know each other and they are introduced to The Plan basics. Ideally, I take the sponsor through a personal planning session so that they experience it first-hand.

Starting with the goal of what the client wants to achieve, we establish the meeting purpose. Why and what do they need to plan? What are their issues? Where do they want to go? This involves some discussion and the use of The Plan itself in most cases. The objective is to sum up the purpose in about ten words and to come up with a meeting title.

The preliminary meeting is also where I find out what I need to know about the client's business and current situation. Do they make their decisions by consensus or by leadership? Is there a hierarchy? How well positioned are they in their field? How connected and functional is their team? What are their key issues and what others are likely to arise? Knowing the landscape ahead of time gives me a heads-up on how to approach the meeting. In most cases, my next encounter with the client will be before a live

audience and the fewer surprises the better for saving time and running a smooth, productive meeting.

With the meeting purpose defined, we then make a list of participants. It is important that the participants and the purpose are closely aligned. Building a team or a group begins here and is key to successful planning. As the term "student body" implies, all the students make up one unit that functions as a whole. If Sales and Marketing are meeting to discuss launching a new product, does Accounting need to be there? Their involvement is perhaps for a different meeting. If possible, I go over each participant's profile with the sponsor to gain some familiarity with their personalities and their roles, and also to make sure that they are a fit with the meeting's purpose.

Once we have established who should be there, the list does not change without some discussion and careful negotiation. If a last-minute schedule change frees an appropriate person to attend, that is okay. "I've decided to bring my assistant" is not, unless this person is connected to the meeting's purpose. If this is a sales launch meeting and the purpose of bringing the assistant is to make them feel included, the answer is No. That would be a management issue; however, if the assistant deals directly with customers, it's important that she attend the meeting.

Next, the sponsor and I create the agenda. The agenda both aligns the meeting content with the purpose and structures the schedule. Setting the agenda gives the sponsor and me a clear idea of what we can manage in the allotted time. If we find that the purpose is too ambitious time-wise, we can pare it down. If, on the other hand, we find that we have some leeway, I can plan on increasing "play time". We also figure out when and where to schedule breaks.

Anything and everything else about the meeting is covered in the preliminary meeting. For example, sometimes the client has participants coming from out of town for a conference and may wish to squeeze in an hour or so of additional business. This can be negotiated but I tend to discourage such additions once I have taken the

floor because The Plan works best uninterrupted, with a firm group entity that includes me. The fewer distractions the better.

One time, the sponsor phoned me the day before a meeting of regional managers to ask if she could show a PowerPoint presentation of the year's achievements. She suggested squeezing it in after the introductions and before we started The Plan. Since it had been difficult to assemble participants from all over the country and there were time constraints, against my better judgment I consented. The meeting started off with a good feeling, which was zapped by the extremely boring slide presentation. When The Plan resumed, my role was confusing to them. Furthermore, people were uncomfortable expressing their issues after viewing the organization's wildly positive presentation. Had we discussed this in our preliminary meeting, I would have suggested simply emailing this material prior to the meeting or covering it in a working lunch. Live and learn.

The most valuable function of the preliminary meeting is establishing a relationship with the sponsor. This can be very important to the success of the meeting. Talking openly with a free exchange of ideas and questions, we can anticipate sensitive issues that may arise and how best to handle them. Often the sponsor gives me the low-down on internal political struggles and lets me know what kind of behavior I might expect from certain participants, which is helpful.

The pay-off is that during the meeting, the sponsor and I can work together to make judgment calls and decisions as needed. Remember, the meeting is live, in the moment and public. There is neither the time nor the forum in which to have sidebars with people. There was no place within the schedule or in the meeting room for me to take Cheryl aside and ask her to stop playing with her cell phone or to have a private coaching session with Professor Green on word economy.

Breaks are breaks and are best used for relaxation, recharging and downtime, not for one-on-one discussions about meeting issues. However, having established a

relationship with Steve, in the Datastore meeting I was able to offer support as he nervously rolled out his plans for the future. Forewarned by Violet Green, establishing firm ground rules about staying on topic helped to respectfully truncate Professor Green's ramblings and to draw Basil into the meeting.

Similarly, in the preliminary meeting for the annual retreat of a big restaurant chain, Jack, the President and I scheduled three days to work through the areas of corporate issues, branding and marketing, operations and franchising. However, their international expansion, which had been recent and rapid, loomed so large in the first set of challenges that we had to change our course. During lunch, Jack and I quickly brainstormed and made the decision to dedicate a separate meeting to international expansion, enabling us to continue as planned. This turned out to be a wise move which would not have been made without my solid connection to Jack.

Finally, at the end of the preliminary meeting, the sponsor agrees to send an email to participants informing them of the meeting name and purpose, date, start and end times, agenda and the list of participants. They are asked to promptly confirm their attendance for the full duration of the meeting and to address any additional issues they may have.

Preliminary Meeting Tool Summary

- Establish the Meeting Purpose.
 - Discuss the company, what it does and where it wants to go.
- Make a list of Participants.
 - Get a profile on each one from the sponsor including their personality and their role.
- Set the Agenda.
- Establish a relationship with the Sponsor.
 - Clarify their role in the company and their relationship to the other participants.
 - Gather information about the company issues.

- Take the Sponsor through The Plan or familiarize them with it as much as possible.
- Have the Sponsor agree to send out an email immediately to the participants outlining the meeting purpose, participants, agenda and schedule.
 - Have participants confirm their attendance and commitment to the schedule.

Making Team Building Easy with a Facilitator

As organizations evolve, great opportunities and projects often come along that invite people to step outside their established roles to make them happen. Using a facilitator speeds up team building. The facilitator jumps the hurdles of seniority, authority and many other organizational necessities that can get in the way.

Henderson and Partners Chartered Accountants were presented with a very lucrative opportunity, or ominous threat if they continued to do nothing. However, they could not seem to act upon it within the day-to-day workings of their company. This is an interesting case study from a facilitator's point of view because among the ten participants were two embodiments of the most challenging behavior—the Class Clown and the Invisible Man. These are the kinds of people who make it hard to make it easy! Also, just in case you think I'm sounding a little too full of myself at this point, this tale is full of humbling "shoulda, coulda, woulda's."

John, the Manufacturing Team leader, needed to bring the individual partners who were servicing manufacturing clients out of their silos and onto the team. The good news was that as generalists serving a broad range of manufacturing clients, the wealth of experience among them had the potential for a very lucrative niche. The bad news was that by not performing as a pro-active team with shared resources, they were becoming vulnerable to their more specialized competitors.

Manufacturing Team Preliminary Meeting

Preparing for the Henderson meeting, I felt that John's personal planning session and a thorough preliminary meeting put us on solid ground. Young, quiet and a very nice guy, John had some management issues. With each partner essentially running their own busy practice, it was difficult for John to motivate them to make the Manufacturing Team a priority. As they were his peers at best and in many cases his seniors within the organization, he was having difficulty establishing himself as leader. Making time, of course, was an issue as it is in any successful organization. But John also felt that some of the individuals on the team simply would not defer to anyone else, even though they believed in the value of the team. Clearly their meeting would need some serious team building.

The major issue, as John explained, was that niche accounting firms were the way of the future, and in order to stay competitive, Henderson Manufacturing Team had to establish itself. Theoretically, it had existed for about three years but it had not really constellated or become focused. Since it takes about five to seven years to build a niche, the longer they delayed, the further they fell behind. For example, a few partners on their team had clients in the publishing business, yet they did not consult with each other nor did the firm as a whole pursue this sector. Instead, new business continued to come randomly from their reputation and referrals, usually generated by the well-connected founding partners or "Executives". In various meetings, the team had discussed developing and marketing their manufacturing "product" but progress had been slow.

With a purpose, an agenda, a list of participants, meeting guidelines, The Plan and a good rapport with John, we were ready for our meeting.

The Team is Good But What's Wrong with the Players?

On a fine spring day, we set up our equipment in Henderson' spacious, beautifully decorated boardroom and waited for people to arrive. At 1:00 as scheduled, the meeting started with seven of the eight Manufacturing Team partners, one Executive Partner and the Director of Marketing. There was a good feeling in the room as we introduced ourselves and warmed up, going over meeting guidelines, the agenda and the structure of The Plan.

I also introduced them to my handy tools, the talking ball and the BS grinder. Invented by systems engineer David Talbot, the BS grinder is used to let people know that they are talking aimlessly. It is a wooden block with a winch handle on top that perpetually rotates a gear through four sections as you turn it. In other words, it grinds on and on going nowhere. With several of them placed on the table, a participant can pick one up and turn it to gently remind the speaker to get to the point.

A go-around in which each participant stated their challenge acquainted me with the personalities and also gave some shape to the group that was being formed. Among them were Peter, the Marketing Director who was cheerful, talkative and easy going and Winston who seemed very uncomfortable as he spoke quietly and gave a very short statement. Everyone else was energetic and ready to jump in. Buy-in was reaffirmed by desire build every participant's to successful Manufacturing Team. We were now on our way as the list of challenges grew.

At about 1:30 as the issues were rolling onto the screen, the door opened and a man talking loudly on his cell phone came in and sat down in the empty seat in front of Freddy's name tag. He then ended his call and asked without apology, "What are we doing here?" Since I have always believed that being late is either a "*^&*% you" to yourself or a "*^&*% you" to another person, I quickly

figured that Freddy was showing disrespect not to himself but to the rest of us.

"Hi. You must be Freddy. I'm Ron."

"What's happening?" he asked.

"Well, we're on round two of listing challenges. It's John's turn but maybe he'll let you go ahead of him."

Freddy began to read the list of challenges on the screen mumbling to himself. Suddenly he looked up at me and blurted out, "This is load of crap. We all know this stuff. 'We are not on top of what our competitors are offering," he read aloud in a cartoon-character voice. "What else is new?" He continued to give his opinion.

"Who has the ball?" I asked the group, which flew immediately into my awaiting hands. "Freddy, we have an agreement that whoever has the ball has the floor," I said making eye contact with John, whose hands quickly cupped for a catch. There was some light laughter and a smile from Freddy, followed by John stating his next challenge.

Freddy sat quietly and continued to read the compiled list to himself until his turn rolled around. My relief that he had calmed down was short lived. By no means won over, he criticized the meeting and the firm for holding it before stating a *bona fide* challenge of his own, which was that the Manufacturing Team was not aiming high enough in what it was capable of achieving. Before his next turn, his phone had rung again and he left for another ten minutes. In the meantime almost everyone else was getting the hang of The Plan which was fostering some good discussion and a free flowing list of challenges.

At the other end of the personality spectrum was quiet Winston. Very withdrawn, when his turn came he quickly listed short, obvious challenges such as "We need to attract more clients." John had a lot of respect for Winston, describing him in our preliminary meeting as an excellent accountant with a solid, thriving practice. His holding back in this meeting puzzled me. Using his name frequently and engaging him longer than the others when it was his turn, he nodded in agreement and smiled at my jokes but did not

speak a word more than was necessary. Still in the early stages, my plan was to wait and see.

The team tackled the challenges and a thorough, well thought-out list was compiled. All the issues discussed in our preliminary meeting had emerged along with many more. Peter had added some very valuable branding and marketing issues, albeit sometimes in the form of a long narrative. At one point when it was his turn to state a challenge he began, "Here's what happened with the website. Martin and I met with the webmasters and the graphic artist and they had this idea that..." Martin turned the handle on the BS grinder as Peter continued for a minute until he finally noticed it and smiled.

"Peter, what's your issue," I asked.

After a brief, to-the-point discussion he said, "The website does not accurately describe the Manufacturing Team specialty as it is currently functioning but is more about what it will be in the future."

As the group was chewing on the fine line between the roles of accounting specialist and consultant, Freddy returned, finished his phone conversation, sat down and told a quick anecdote about his three-year old son. "Freddy, we are finishing up the challenges here. Anything you want to add?" I asked.

"What about duplication of services?" he shot back.

"It's there," someone said.

"I think we're good." John added.

Freddy paused again as he scanned the screen. "You know what we should be doing here," he said (not "asked"). "We should be going through our SWOT analysis. It was great. We covered a lot of the same stuff and we should just continue with it." Oh-oh. Speaking of challenges, was I being challenged to a duel?

"We're doing *this*," John stated firmly. Others mumbled in agreement.

There are a few ways to go when someone throws down the gauntlet or a fight looms. I am happy to say that it has happened only twice in my career and that bad behavior doesn't really phase me too much. Since I like people, I care

about them and I believe in them, their acting out does not make me angry. I don't take it personally nor do I get defensive. They have their reasons which are often beyond the scope of the planning session. My concern is to keep the meeting on track and to avoid embarrassing or patronizing anyone, which the structure of The Plan seems to accommodate.

"Okay, Freddy. That's one heck of a concern. That's a biggy. When did you do the SWOT analysis?" I asked.

John answered, "About six months ago."

"Freddy, there are a couple of ways we can go here," I continued. "We can put the SWOT analysis in the Parking Lot to be taken out and driven at a later date, or you can add your concern to the list." The Parking Lot is the last section of The Plan where we store things that come up in the meeting but which are irrelevant to the purpose.

Freddy thought for a minute. "It's an issue. Let's add it to the list. Here goes. We already did a planning session using a SWOT analysis and we are starting over instead of using it."

"Good." I said. "A planning issue. We can work with it. Does anyone want to add anything that they recall from the SWOT analysis?" They thought for a minute until someone came up with an issue.

Freddy settled down somewhat and as the meeting progressed he added some valuable input. Senior in years and experience to everyone else on the Manufacturing Team, he had clearly bought into their purpose but my hunch was that he had real issues with the dynamics of the team itself. Nevertheless, he shone in the goals segment displaying a keen understanding of what the Manufacturing Team would be and a thorough knowledge of how their competitors were positioned. By the time we started the action plan, the brat had vanished and a valuable, respectful team player had taken his place.

SWOT Analysis Versus The Plan

Some readers may not be familiar with a SWOT analysis; others may be experts. As it is very popular, I have

read about it and discussed it with clients who have used it. For those who don't know, SWOT is an anagram for Strengths, Weaknesses, Opportunities and Threats. The technique is credited to Albert Humphrey, who led a research project at Stanford University in the 1960s and 1970s using data from the Fortune 500 companies.

Starting with an objective, internal strengths and weaknesses are identified, followed by external opportunities and threats in that order. Points are usually written down on a table with two columns to compare the positives and the negatives side by side. By all reports, the business or project gains a clear understanding of its position at a given time and can proceed from there. Many of my clients, including Freddy, value the analysis greatly.

The Plan by comparison, I am told, achieves the same result but its execution is more flexible. It allows for many categories and a plan of action effortlessly emerges. Furthermore, unencumbered by a table structure, The Plan outlining software makes it easy to move and change items as the team collaborates on a planning document.

At the time of the Henderson meeting, their SWOT analysis was six months old, yet they had not taken any steps towards their goal. Apparently, it had not spawned an actionable plan. Their real issues, which had been listed as Weaknesses and Threats, were now Challenges, where they would be placed in an appropriate category and acted upon. While I do not doubt the value of making a SWOT analysis, what I hear from clients is that The Plan is quicker; it has a broader framework and produces an action plan.

The Plan also avoids the peril of sinking under the weight of details. Effective planning strategy strikes a balance between unearthing all the relevant information and not getting bogged down in data. As I have pointed out numerous times, planning is constantly being stalked by resistance which comes in many forms including details. Just as the process is in full swing, someone tries to disappear into rearranging wording, second-guessing appropriate categories, telling a story or checking a ballpark

figure for accuracy. As a facilitator whose job is to stay on track, I have to beware of derailment by details.

Moving along in the goals segment of the Henderson meeting with everyone playing nicely, I asked as I often do in meetings, "How much money would you like to be making five years from now?" A nanosecond later I realized my mistake: You asked a room full of accountants to *imagine* a figure? I scolded myself, hand against forehead in disbelief.

Before I knew it, the meeting was grinding to a halt with Freddy on his calculator saying, "No, wait, let's see, fifteen clients, no, no, I mean...."

It was also during the goals stage that Winston started to shine. He had some brilliant ideas about going after the Technology sector of manufacturing. He paid close attention to Peter's branding and marketing input, asking questions and making suggestions. Clearly, he had been taking everything in from the meeting and processing it, perhaps figuring out the landscape before he joined in.

Dealing with difficult people is often an underlying reason for hiring a facilitator. Conscious or not, my guess was that Freddy was uncomfortable conceding leadership to the younger, less experienced, quiet John. John, on the other hand, was not a manager by profession, nor did he have the inclination, the tools or the mandate for bringing Freddy into line. By seeking a facilitator's help, internal politics were avoided, the team connected and more importantly, an action plan was created in which Freddy committed to completing tasks by an agreed-upon date. The Henderson planning session achieved its goal in spite of a bumpy beginning and some unusual behavior. They reported that their action plan was keeping them on track and that The Plan format was working well in their monthly meetings.

If I Had It To Do Over Again...

As you may have already guessed, there are a couple of things I could have done differently to ensure a smoother Henderson meeting. My preference is to hold meetings

away from the client's place of business, either in a rented space or in our boardroom. The obvious reason is so that people like Freddy are captive, the not so obvious is that it is better for everyone to plan from a brand new place. Since off-site was not an option in the Henderson meeting, I suppose I could have been more insistent in the email that went out prior to the meeting that participants be on time and stay for duration.

Perhaps I should also have delved deeper into the Henderson planning experience. While John and I had a thorough discussion of their planning issues and meeting habits, for some reason the SWOT analysis was never mentioned. Moreover, from the behavior exhibited in the meeting, my hunch was that their experience with facilitated meetings was rather negative. Finding either negative or a lack of experience in their background, I would have emailed each participant a one-page information sheet about me, The Plan and the ground rules before the meeting, inviting them to contact me with questions or comments.

The People Reading Tool

One of the things I love about working with people is reading them. What motivates an individual? How do they absorb information, perceive their world, make decisions, problem solve and communicate with others? While I have worked with people all my life and have studied various mappings of personality types, at this point my assessments are quick and instinctive without consciously subscribing to a particular method.

There are hundreds of ways to characterize personality types and if you work with people, you may have one that works for you. For example, there is the Myers-Briggs Type Indicator based on Carl Jung's psychological types, which is used by many counselors, coaches and therapists to identify significant personal preferences. It identifies sixteen personality types, using a combination of four sets of dichotomies or opposites: extroversion/introversion; sensing/intuition; thinking/feeling; judging/perceiving. My guess is that Freddy and

Winston would be at opposite ends of the spectrum with Freddy the extrovert, sensing, thinking, judging type and that Winston the introvert, intuitive, feeling, and perceiving.

"He's sooo right brain!"

Popular and common in everyday language now is the left brain/right brain theory which suggests that each side of the brain controls different modes of thinking, and that everyone has a preference for one or the other. Left brain people are logical, sequential, rational, analytical and objective, looking at parts rather than the whole. Right brain people are the opposite: random, intuitive, holistic, synthesizing and subjective, looking at the whole rather than its parts. My guess here would be that Winston is left brain, Freddy right brain; Winston sat quietly taking in the whole picture before joining in while unbridled Freddy was subjective, random and interested in the whole picture.

Brainstyles

The Brainstyle System takes the left brain/right brain approach up a notch as a tool for understanding individuals and their contributions to group dynamics. It is based on the work of Nobel Prize winning psychobiologist Roger Sperry who determined that the hemispheres of the brain are genetically "hardwired" to process new information, make decisions and take action. Entrepreneur David Cherry developed Brainstyles when he was having difficulty leading a team of highly capable but floundering executives in a startup company. After much observation of senior leaders' ways of dealing with new information and decision-making, especially in stressful settings, he concluded, "it must be the brain." His research led him to Sperry and he developed the brainstyles system which he tried out on his team with fantastic results.

The four brainstyles are conceptors, deliberators, knowers and conciliators.

Conceptors take in information at time zero (in the moment) with both left and right brain. They pick out

patterns, concepts and underlying themes. Their strength is inventing and they thrive on change. Art and probably his whole advertising team are conceptors.

Deliberators resist the information at time zero and search their memory to assess the situation. They make delayed decisions but they can give rapid opinions or assessments. Their strength is analyzing and putting pieces into the whole. They like planning. Winston is a deliberator, also Lenny, Datastore's Project Manager.

Knowers come to rapid, factual, unemotional decisions by sorting at time zero. They are clear, logical communicators who are better with structure than they are with people. They are great at seeing cause and effect relationships and crafting practical solutions. They work best independently. Freddy would be a knower, also engineer David Talbot.

Conciliators are greatly influenced at time zero by what is said, seen and felt. They act quickly and spontaneously. Their strength is building relationships, creating harmony and supporting new ideas. Peter, Henderson's Marketing Director and Basil Green are conciliators.

Though I don't consciously use *The Brainstyles System*, what I like about it is that it regards each style as part of the whole team dynamic, valuing each person's contribution and particular strength. Furthermore, it is a model for real time, taking into account each individual's access to and synthesis of new information.

But I Thought You Said The Brain Was Made of Plastic?

Brain research, like the brain itself has evolved since 1983 when Sperry and his team received the Nobel Prize. In our discussion on achieving goals in Chapter 3, we introduced the current brain theory Neuroplasticity which demonstrates that learning and experience can actually change the brain anatomically and that it is not in fact "hardwired." This does not however, lessen or dispel David Cherry's *Brainstyles*. Regardless of the inspiration, his comparisons and insights into how different people

approach tasks works for many facilitators. Similarly, though many in the field of psychology refute Carl Jung's theories, the Myers-Briggs Indicator based on his work is a widely established, successful personality indicator.

The Age of Specialization and Birds of a Feather

Having a system for reading people is important when you are working with a group that is collaborating on a task. It enables you to observe and recognize quickly the different individual approaches and respond accordingly, reining in the loose cannon, drawing out the quiet person, helping the story teller to get to the point, bringing the optimist down to earth and taking the pessimist on an exploration of options. I guess that makes me a conciliator.

Living in a highly specialized world often means that people of similar brainstyles end up working together. Accountants really do tend to be left brain while advertising people operate from the right. It is wonderful that they find their calling and the like-minded people that maximize their strengths and talents. But often this stratification is what causes them to get stuck. In order to plan and problem solve, they need a facilitator to get them to see and do things differently. Generally speaking, the creative team needs help with structure, accountants with relationships and an established company like Datastore with growth and change.

My most valuable tool for reading people is The Plan itself. Somehow within the framework of everyone being heard, focusing on the screen and imagining big, each type is accommodated. Moreover, it allows them to stretch and explore the boundaries of their habitual ways of being in a safe and structured environment. Freddy's behavior was outrageous and would have been really alarming had I not known that we were working within a flexible but structured model. The Plan also crafts an action plan quickly, which is satisfying to all types.

The Oldest Personality Types in the World

Mythology from all times and cultures is full of different types, making their way with their own unique approach. The hare and the tortoise, the ant and the grasshopper and the hero slaying the dragon come to mind. The job of all fables and characters is to teach lessons that elicit change. The types that work for me in reading Freddy and Winston are Eagle and Owl from the Lakota tradition. The Sundance meditation performed at dawn is a spiritual exploration and also a good workout which integrates our left brain and right brain natures.

Eagle takes action in the moment from time zero and Owl is the wise one who ponders and observes in the night. Eagle speaks before Owl thinks and Owl thinks before Eagle speaks. Facing each direction, which represents an area of life and reflecting upon it, can give great insights into our inner workings. Where do we jump in and take action and where do we stop and think things through or hesitate?

Both approaches have their strengths and weaknesses. What do you do spontaneously and what do you plan? Is your judgment sometimes flawed? Can the two approaches learn from each other? We all have moments when we wish we had spoken up or that we had kept quiet, that we had controlled or expressed ourselves, that we had acted or kept ourselves from reacting, that we had bought or sold.

What I like about this exercise is that it gives you awareness and a means of balancing different parts of yourself. First you face the East which represents the element of air and its qualities of communication, thought, ideas, truth, and justice. The East is where the sun rises symbolizing a new day, spring and childhood. Extending your right arm, you say, "Eagle speaks before Owl thinks." Some of the words you have blurted out or truths that have popped into your head may come to you. Then you extend your left arm and say, "Owl thinks before Eagle speaks." Ideas that you are chewing on or something you wish to say

to someone may come up. Next, you bend down, touch the earth, stretch your arms up to the sky and turn to the South.

The South represents the element of fire, the sun at its brightest at noon and in summer. Its qualities are action, spirit, passion, youth, and work, exercising your will and making things happen. Eagle speaks before Owl thinks about rushing into things, being aggressive, taking charge, working, playing, having fun. Are you a "hot head"? Are you impatient? Owl thinks before Eagle speaks about the best time to act, the best plan of action, also about not hesitating too long. Then you bend down, touch the earth, stretch up to the sky and turn to the West.

The West is water at sunset, your feelings. Eagle speaks before Owl thinks about what makes you feel good and what makes you sad. How do you express your emotions? Do you laugh and cry easily or do you hold back? Owl thinks before Eagle speaks. Do you take risks and move beyond your fears? Touch the earth, stretch up to the sky and turn to the North.

The North is the earth, nighttime, winter and silence. It is real, the laws of nature, what you can touch, your money, your house, your health and the end. Eagle speaks before Owl thinks about resources. Do you face up to reality and budget your money or do you go into debt and neglect your health? Owl thinks before Eagle speaks. How can you manage your resources better? How can you take better care or yourself? What is your long term plan? Do you deny yourself things or buy treats? Touch the earth, stretch up and touch the sky and turn to the East again.

By the time you have gone around about three times, you start to get a sense of balance in the four areas and make connections between them. The important thing is that you see how dynamic you are, that you are made up of many different ways of being which are never static.

As I work with people in meetings, I notice that some transformation takes place. Freddy, very much the eagle, eventually connected to his Owl nature and Winston the introspective owl was able to be the in-the-moment Eagle when we were setting goals and planning action.

The Listening Tool Easy Listening with The Plan

"I thought you meant," "I thought you said..." Many explanations for misunderstandings begin this way. The funny thing is that thinking is not required, only listening. Listening is the facilitator's best tool. In Dr. Stephen Covey's book, *The Seven Habits of Highly Effective People*, Habit #5 is "Seek first to understand and then to be understood." Listening is the path to understanding.

The Plan, with its forced focus, makes it easy for everyone to listen and almost impossible not to, for a few reasons. One is that by eliminating the distraction and the pressure of note taking, everyone can sit back and listen. But the real resonance comes from the process of projecting individual's thoughts onto the screen and then having everyone read them aloud in turn. This is where you get to say and hear, "I see what you mean." When you read aloud a thought that is very different from your own, you really hear it, and when someone else reads your words you know that you are being heard. Imagine Forest Green saying in his wife's words, "If this project does not come to fruition within the next six months, I am going to leave." Yikes! I think he heard her as never before.

Listening sounds easy. You don't have to do anything, just sit there and not say anything, right? Not quite. Listening is not easy. The problem is that resistance has a whole bag of tricks to block listening. Some people either talk or wait to talk while a voice in their head chatters about everything that is overwhelming them. We are all in overload, thinking about all the things we have to do and how to manage our time, how to get the most out of every second.

The action plan is the right tool for cutting through the chatter. Trusting that well thought-out, manageable, scheduled steps will in fact emerge from your challenges and goals has a way of soothing the chatter. But how will we get it all done? Where will we begin? Who will do it? When? When the Challenges and Goals have been worked through and everyone has been heard, the action plan falls out naturally, attesting to the power of listening.

Easy Listening With a Facilitator

Because I love people, I am very fortunate that listening to them is easy for me. I love talking to people and hearing what they have to say. As the old saying goes, if talking to people were illegal, I would be in jail for it. This is an obvious benefit to my work as a facilitator. While listening comes naturally to me, I have had some great teachers and experiences along the way that have given me some valuable skills.

As a facilitator, I believe it is my job to give my undivided attention to people coming forth with what they need to say in order to forge the best plans possible. It is not always easy for people to express themselves in a planning meeting where they may have an awareness of their organization's underlying politics, subtexts and hierarchical structure. But I find that listening with an open mind clears the way for expression. People have to be heard on their own terms without judgment or interruption, expressing a thought or idea completely. They may need questions for clarification to help them along but when they have the floor, I am all ears until their thoughts, in their words, go up on the screen. Since my interest is genuine and I care about what they have to say, this is easy for me.

This is not a two-way exchange and while many people, including some facilitators, view empathy as an aid to listening, I believe it can be a block. For example, if a participant is trying to say what he or she feels about the perils of missed deadlines and I say, "Yes, in my business I have found that..." I cut them off. Now we are talking about me and their thought has been truncated. If they are hesitant, I stay focused on them. They may be taking a risk coming forth with an issue in front of their colleagues, a fresh idea may be hatching or they may have just found the appropriate time to bring up something they have been sitting on for awhile.

I am there to make it easy for them to find the words to express their unique thought. "I know how you feel" is a nice sentiment but is it true? This extends to those mourning the loss of a loved one or ecstatic with the joy of a new baby. The experience is unique and new to that person, perhaps making it difficult to communicate. If you really want to help, listen patiently to their idea, thought or the story that they want to tell you, respecting the uniqueness of their experience.

Listening does not require that I gather all the details and in fact doing so can be a distraction for the person trying to frame an idea. Facilitators are not consultants. Ironically, many of my clients feel that the success of The Plan is due largely to my knowing nothing about the workings of their business. Through being heard and collaborating on the right plan, they become their own consultants while I keep them on track.

In the Henderson meeting, they needed to get a few things out on the table. They all knew beforehand that they possessed a wealth of expertise within each partner's practice which was not being harnessed collectively and that they needed to be proactive in creating a road map to their niche. Yet before going through The Plan, this communication had somehow been blocked. As their own consultants, their action plan developed to include scheduled regular meetings, participating in a manufacturer's conference and reviewing budgets.

It would have been very easy to derail the meeting with details and number crunching in any one of these areas. What a relief it would have been to get out the calculators and avoid the business of collaborating and planning altogether! Instead, they chugged along tabling and scheduling, and the meeting was productive. What I was listening for was the key points, not the details.

Listening from a place of focus with the sole agenda of my clients achieving their goals makes it easy for them to bring their thoughts to fruition. Conscious or not, the facilitator with other motives or the leader with a hidden agenda has difficulty listening objectively. Constantly bombarded with sales and marketing pitches these days, I believe it is counterproductive for a facilitator to do anything other than facilitate. Trying to sell future meetings or promote a friend's web design services clouds objectivity and openness.

What defines any professional is their devotion to the client's position. In the Datastore meeting for example, Steve's agenda was to build a team that bought into his new business model and he was very candid with me about his difficulty in making this happen. With no agenda of my own other than to facilitate, participants were able to express all their issues and collaborate on a vision without feeling a bias one way or another. Would Cheryl have been as forthright with her view that the new business idea was a bad one if Steve had been presenting his agenda front and centre? Apparently not, because he heard her for the first time in the process of The Plan.

Questions play a role in active listening and much has been studied and written on the subject. You may well be wondering where the line is drawn between asking questions to help someone express their thoughts and avoiding the distraction of details. My guide is always the level of engagement, both between the participant and me and among the group as a whole. "Well, we didn't meet our deadline on the insurance company project," says the Project Manager when it is his turn. This is not exactly a challenge and he needs some encouragement to frame it as one.

"Why not? Does this happen often?" I ask.

With some dialogue and possibly with some input from others, these questions lead him to formulate a challenge, "Poor communications with Sales results in deadlines that are impossible to meet."

Irrelevant questions are a details distraction. "What did the project entail?" "How many people worked on it?" "How much money are we talking about?" The whole post mortem comes out which is not useful in articulating the challenge. When I asked for projected earnings in five years in the Henderson meeting, the purpose of the question was

to set goals starting with the end in mind. Instead, I created a details trap. But since the meeting was engaged, we were able to correct it quickly and move on.

The Talking Ball Listening Stick

Even though The Plan gives everyone a chance to speak, listen and focus, sometimes we need the talking stick to harmonize the static of lively discussion or airtime inequality. A wonderful Native invention, I am proud to say that the talking stick was introduced to me in an Ojibwa talking circle (which could also aptly be named a listening circle). As you have seen, I have made a few adjustments for my planning meetings, using a soft, spongy baby's ball that does not scratch boardroom tables and flies quickly through the air for our fast-paced city life. But it works. Whoever has the ball has the floor, an agreement that is always respected in meetings. Even Freddy, brazenly and challengingly disruptive, had no problem respecting the talking ball.

My experience is that Native people think with their hearts rather than their heads. In a meeting or ceremony they use the talking stick to respect everybody. This has given me a very different perception when I talk to people. We talk so much in our culture, mostly from our heads, avoiding pauses. First Nations people communicate very differently. I am really fortunate to have had the opportunity in the 1990's to have spent time with them and learn some of their ways, which have become a part of my work and me.

My involvement began when my dear friend Michelle Finney invited me to an Ojibwa ceremony at her house. Michelle worked for Hannah Strong who founded the religious retreat in Crestone, Colorado dedicated to providing a contemplative community for people of all religions. It draws people of all faiths from all over the world. In 1988 Hannah started the Manitou Foundation to bring in the Native perspective with their deep connection to the earth. Also, to help the Native people to get back on their feet after all the abuse they have suffered, she found

funding for a retreat in northern Manitoba. This evening at Michelle's, her colleague David Courchane, an Ojibwa leader, educator and healer was leading the ceremony.

It was magical, a solemn and spiritual ceremony but also joyful and relaxed. I met some wonderful people and I had a great time except for one small distraction: David's son and his four friends, in their late teens and early twenties, kept laughing at me during the ceremony. I had no idea why and I took it very personally. But it did not dampen the evening in any way, and they must have thought I was okay because they invited me to their winter solstice ceremony at their retreat.

At the darkest time of the year, a group of us headed to northern Manitoba to celebrate the return of the sun. As I got to know everyone, I found out why the boys had been laughing at me. They recognized my nature as the Windigo, the contrarian spirit who sees the opposite side of things and makes people laugh. The Windigo is a healing clan and laughter is a big part of their medicine. While I was there I was honored for my outrageous nature.

One evening I was sitting next to a lady, also a Windigo who elbowed me and said very quietly, "Go ahead and sing."

"I can't sing," I said, "I sound like Jerry Lewis when I sing."

"You have to sing because that's your nature. You are a Windy," she insisted.

After about twenty minutes of getting over the nervousness, something overtook me and I began to chant like Jerry Lewis. Everybody broke into hooting laughter. When I stopped, all the children came over and said, "Do it again, do it again," which I did after about twenty minutes. Again, the room filled with laughter because of my crazy singing. It was such a great time and they honored me with a beautiful eagle feather to thank me for allowing this nature to come out.

I went for the weekend and stayed for three lifetimes and a month and a half. On Sunday night, Michelle and her family said, "Let's go now," and I replied, "See you

later." Back home, I was somewhere in between the fifty-seven businesses I have been involved in and I said, "I'm staying here." David's mission was to get his people back on their feet and I wanted to help. His goal was for them to stop drinking and to reconnect to their Native identity, which many had lost. For a month and a half I listened to their stories, participated in sweat lodges and ceremonies and developed a deep love, respect and spiritual connection with Native people.

When I returned to my city life, I realized that I had brought that connection with me. It helps me to get out of my left-brain nature and more into my right brain, and I bring some of that spirituality to the business world. It also made me a good listener, giving acknowledgement to what people need to say. Sometimes I think that it was this experience that taught me to be a facilitator.

The Manitou Foundation was a huge success with some far reaching effects and I was fortunate to become involved with them again. In 1992, my brother Harry gave me a fiftieth birthday present of a trip to anywhere in the world. I found out that David, Hannah and ten Native people were going to Israel for a ceremony to be taped by CBC and they invited me to come along. It was an amazing two weeks of spirituality and meeting great people, many of whom are friends to this day. I was privileged to be a part of the Ojibwa people connecting with the Beta Israel or Falasha, a tribe of Black African Jews who had been isolated for centuries and had recently been discovered and reunited with other Jews. It was extraordinary.

I believe that listening, which leads to understanding, is the key to meaningful exchange of religious beliefs and practices. This is the spirit that I dedicate to my work.

The Inventory of Tools in this Chapter

In this chapter we worked with tools for helping people to communicate effectively so that they can create the best possible plan. As we saw, they are handy for getting people to think, talk and listen and also sharp enough to cut through all kinds of resistance. Some, you pick up and start using immediately. Others take some practice and training. Once mastered, you have a tool kit that makes planning happen automatically. Here is a snapshot of the complete set. In Chapter Five we bring out the big tools that we have mentioned for projecting notes.

The Facilitator – makes planning easy, connects teams and frees leaders to participate in planning.

The Talking Ball – clarifies who is speaking and forces people to take turns. Whoever has the ball has the floor.

The BS Grinder – respectfully nudges speaker to get to the point.

The Preliminary Meeting – facilitator and sponsor or team get to know each other. Together they define the meeting purpose, make the list of participants and set the agenda.

Reading People – assesses personality types and their different approaches to communicating and problem solving.

The Plan – the process that gives a framework to planning while allowing participants to express themselves and be heard.

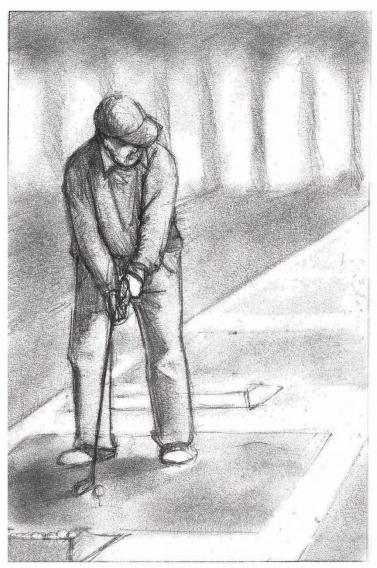
The Parking Lot – the last section of The Plan where issues that are important but unrelated to the planning meeting purpose can be noted.

Listening – leads to understanding.

When you are inspired by some great purpose, some extraordinary project, all your thoughts break their bonds; Your mind transcends limitations, your consciousness expands in every direction; and you find yourself in a great, new and wonderful world.

Dormant forces, faculties and talents become alive, and you discover yourself to be a greater person by far than you ever dreamed yourself to be.

Patanjali



Every golfer knows the only way to get the perfect swing is with constant practice. Planning your strategy in your professional and personal lives should be practiced as well. When you execute a plan, rehearse first it to find possible errors, omissions and reduce stress. Winning' it is very dangerous and could be very costly. Entertainers and athletes know all too well the importance and value of practicing. Enthusiastically, when it comes time for the game, everyone is well prepared. Eevery problem has been addressed. Solutions have been identified.

LIGHTS, ACTION, COLLABORATION

OR WHAT THE TECHNOGRAPHER SAW

will never forget the first meeting that Ron invited me to observe. How this group of people managed to accomplish such a daunting task in such a short time was miraculous to me, and thus began my life as a professional fly on the wall. When I arrived at the huge hotel conference room that snowy afternoon, Ron's team was setting up. Name cards were being placed on the white tablecloths of the long U-shaped table, they were testing the computer screen and projector and the caterers were loading side tables with food and drinks.

Ron introduced me to Rene McKinnon, our "roady" and Sue Spears, both Ron's and David's technographer who has since retired. The atmosphere was relaxed, professional and fun and I immediately pitched in on the last-minute details. When people began to arrive, I sat beside Sue who proceeded to amaze me with her lightning-speed typing and keen connection to both Ron and the group as the meeting progressed. I remember thinking, how does she do it? She isn't even nervous in front of all these people, and she doesn't miss a thing.

My interest at that point was in seeing The Plan in action but I had no idea what the meeting was about. The sign outside the meeting room said "Ontario Energy Association(OEA)" and the name cards displayed logos familiar to me—Toronto Hydro, Hydro One, Bruce Power, Direct Energy—all the companies that have something to do with keeping the lights and heat on in our part of the world.

Since it was the winter following the big summer blackout in the northeastern part of North America, these companies had been making the news, often unfavorably. There was speculation as to who was to blame, the environmentally bad sources of energy were outed regularly and everyone was complaining about our ever-increasing utility bills. Energy had been a big issue in our last provincial election. The winning side promised to keep costs down, the power flowing and the environment safe and clean. For as much thought as I gave it, I guess I believed that this industry was driven by high profits at the expense of the environment.

Most of the twenty-eight people settled in and, with Ron at the helm, the meeting began. In his friendly, funny, energetic style he talked about himself and the nature of planning, transforming the room into a warm, connected place charged with potential. The spirit continued with a go-around of introductions and a few words from each participant.

When Ron stated the meeting's purpose my mouth fell open in disbelief. This group had to come up with a plan for writing a position paper on the current critical state of energy in the province, to be presented to the new Premier in two weeks. Yeah, right, I said to myself. The heads of every energy company, both private and public, the Ontario Energy Board's lawyer and the president of their public relations firm are going to do what? The whole spectrum is going to shine with one light? This I've got to see! And I did. It was amazing. By 5:00 that afternoon when they left, each person knew what they had to do, with whom and when. The Plan worked by Ron the Wizard was magic.

The hardest and most rewarding part of being a technographer is keeping quiet, not only during the meeting but afterwards. Like Ron, I enjoy talking to people and I love a good story. But I have also understood from the very beginning the importance of confidentiality. We take it very seriously, and we guarantee that what happens in the meeting stays in the meeting. This meeting, above all others, I wish I could share with everyone in Ontario so that they could see for themselves what a huge responsibility these dedicated, highly professional men and women shoulder. A very specialized field, the parts that reached my understanding loud and clear were the enormous financial challenges, energy demand outgrowing supply and the daunting ongoing task of communicating the workings of a huge, highly technical infrastructure to the laity of politicians and the public alike.

I barely know what happens when I flick a light switch or turn up the heat, but these folks do. They know what is involved in maintaining a very intricate system and how to plan for supplying the growing demand. Since that afternoon, I have never grumbled about a utility bill, I am confident that we are in very capable hands and I am surprised at how seldom the power fails.

As for The Plan, it was a power tool itself for getting these diverse individuals to collaborate as a group. As you can well imagine, the challenges were big and numerous. It took some discussion to come to a consensus on prioritizing the goals and the action plan seemed to emerge logically. It was hard work but Ron kept everyone very much engaged in the process the whole time. Leaders emerged while others remained passive but the level of participation was always well balanced. Resources were brilliantly pooled as strategic alliances formed with a few people teaming up to work on various sections such as finance or contracts.

Breaks were taken after each section of The Plan was completed, which Sue printed out and Rene photocopied and distributed. At the end of the meeting, everyone received a copy of the action plan and walked away with a binder containing the complete document that had been created by them during the meeting.

In the three years I have worked as a technographer, I have seen The Plan in action in many meetings for a wide variety of purposes. While it always works and I am continually amazed, it is this first OEA meeting that stands out because so much was accomplished so efficiently in such a short time.

By Patricia Stuart, Technographer

ALL YOU NEED IS NOTES

As you have seen throughout the book, every planning meeting ends with participants walking away with a complete set of notes which they created on the screen. This document is a key component to the success of The Plan for a variety of reasons. The result of collaboration, not only does it give an accurate account of the meeting, but it also produces an action plan for which everyone is accountable. As we saw in Art's brainstorming meeting for creating a TV ad, no notes at the end of the meeting led to

no record of the meeting and therefore no accountability. As Art explained, his armload of flip charts did not work for capturing the meeting content, nor had real time videotape in the past. Furthermore, back at work after the meeting, no one was sure of their next step.

In this chapter we are going to zoom in on the notes and how they are produced through the magic of technography. You will see why and how they work as the best tool for accountability compared with other methods of capturing meetings.

If you are not sure why you need notes, imagine that you are hosting a big event, a wedding let's say. You want to be able to spend the rest of your life looking through an album or at a video that captures it perfectly. Your wish is that the solemnity of the vows, the beautiful wedding party, hilarious speeches, sumptuous dinner and dancing the night away to great music live on.

Your best bet, I'm sure you will agree, is to hire a professional photographer. If it is a small wedding and you are on a budget, perhaps one of the guests who enjoys taking pictures takes it on. Either way, on the day of the wedding, your only job is to enjoy the happiest day of your life while the photographer arranges appropriately timed photo shoots and blends seamlessly into the wedding. Bingo! A few weeks later, you have the exact album or video you dreamed of and you relive the magic of the day each time you look at it.

Now, suppose that you want to capture the memories but you do not feel that a professional photographer is necessary. Whoever wants to take pictures can do so and your brother-in-law will bring his new camcorder. Whatever. On the day of the wedding, everyone from the caterer to the flower girl is snapping pictures all the time, and there is a feeling that no one is really present. You can't remember saying your vows because of all the flashes and whirring noises. As you open your arms to hug your dear friend who has travelled across the country to be there, your brother-in-law steps between you pointing his camcorder and starts firing questions.

You wonder where all the grandparents have disappeared to, only to glimpse out a window at a procession of gray hair trudging up a hill behind a "photographer". In fact, the amateur photographers hijack the whole day. (Unfortunately, I attended this wedding.) Meanwhile, the food, music and speeches suffer because everyone has a camera and is preoccupied with taking pictures rather than doing what they are supposed to be doing. In the end, you can't bring yourself to wade through the mountains of amateur pictures and film footage.

Or the opposite happens – no pictures at all. "Honey, your brother's speech about your baseball team when you were ten...."

"It was football, Dear, and I was twelve." Memories are the only surviving record.

Similarly, topping the list of reasons that meetings are a waste of time is that nothing is retained. A pile of flip charts, miles of footage and pads full of handwritten notes fail to revive the ideas and follow-up plans created in the meeting.

With The Plan, you have the equivalent of a professional photographer who presents you with an album that says it all. During the meeting, everyone can relax and get on with planning, knowing that they will all end up with the same set of notes, created collaboratively, that capture the meeting. These notes allow for flexibility while they are being created because of the outlining software; readability are typed and not handwritten; because they accountability because there is no misunderstanding what has been recorded. Each note is the conclusion of a thought or discussion, framed in the speaker's own words, which leads to a committed action and milestone dates.

ALTERNATIVES TO NOTES

Handwritten Notes. Handwritten notes rarely provide a reliable account of meetings even for the person who writes them. For starters, people often tell me that they cannot understand what they have written afterwards, either

because the context is missing or they cannot decipher their own handwriting. Your job as a participant in a meeting is to connect and contribute, and taking notes can be a distraction. Moreover, you may end up with fragments of what was said as your attention focuses and fades from the meeting to your notebook.

Inevitably, notes are subjective and the margin for misunderstanding is huge. Two people at the same meeting may interpret an idea entirely differently. In our meetings, people are constantly clarifying wording and meaning with each other until the speaker's words are typed for all to read and acknowledge. With handwritten notes, this step is missed and the chances of recording a misunderstanding are very good.

The only reason anyone needs to jot down notes during The Plan is to jog their memory. Since everyone speaks in order, a thought may pop into your head that you want to bring up when your turn comes. That's it. One reason.

Flip Charts. As I have pointed out before, flip charts do not make useful notes. The pages are too big to put into a binder or to file away, they are hard to read, you can't make changes on them as you go, and many people report that the magic marker scrawl does not always make sense when they revisit it. From a facilitator's point of view, flip charts don't work for the same reason that the caterer at the wedding is not the best choice for photographer: I have a job to do which takes all my focus and which I do best when my technographer is taking the notes for me.

As a facilitator, in order for me to make flip charts into a useful set of notes, I would somehow have to compile all the information I had written on them into a document after the meeting when none of the participants were present to verify that what I had written was correct. I would also have to organize the material myself and I don't know my clients' businesses, they do. The Plan makes them into their own consultants who know best how to categorize and prioritize their own issues, goals and actions.

Jack, the President of the large restaurant chain, described my predecessor at their annual retreat the previous year doing just that. "Every day he left the meeting with an armload of flip charts and came back the next morning with all of it typed up and organized. It must have taken him hours and he didn't always get it right because we weren't there to see what he was doing. One night, it was pouring rain when he left. I was afraid that the bundle of multi-colored newsprint would dissolve before he got to his car and all our day's work would go straight down the drain." Good point, Jack. There is no backup of flip charts.

The Plan produces a set of notes that can easily be revisited, changed, discussed and acted upon. Like the wedding photo album, the document is short and it recalls the meeting accurately and concisely.

Taping. While voice activation software, audio or videotaping in real time may seem to be the surefire way of capturing everything, there are some real drawbacks. We talk faster than we write or type. A fast typist transcribes real time speech at a ratio of 5 to 1 this means that it takes five hours to type one hour of tape. As you are not likely to have either the time or the patience to watch, read or listen to your meeting in its entirety when it is over, it is important to have a method of capturing only what is relevant or useful. Once people settle into the ease and reliability of our technography—a matter of minutes—they let go of other forms of recording.

Confidentiality becomes an issue with real-time recording and transcription as well. Some people feel that it is compromised, also that participants express themselves more candidly when they are not being taped. If the newspaper baron introduces the idea of non-compete fees, he can freely discuss the legalities, the numbers and the procedures with his colleagues before the sanitized goal is recorded and projected onto the screen. Moreover, since a goal is part of the process in The Plan, resulting from a challenge and leading to an action, ideas such as these are

carefully thought through by everyone and those that are flawed are often weeded out at some stage.

But the real issue to consider is how useful what you are taping will be in the future. If the meeting is freeform with nothing steering it, you may not want to relive "Get me a coke with no ice," or "Can you turn down the air conditioning?" along with long-winded stories and conversations which may or may not lead up to a relevant point.

A transcription of real time audio does not make a good read. Furthermore, someone has to edit it or make notes from it if you want to salvage anything of use in planning. Unless the meeting was conducted with a structured format that produced conclusive points, the material gleaned will have to be organized into reference material or a synopsis. The Plan delivers a structured meeting along with an account of it that is readable, accurate and organized. And it is all done by the time you leave the meeting.

What the Technographer Saw Transcribing Taped Meetings

The marketing company for a law firm hired me to transcribe two days of videotaped meetings with a group of personal injury clients. They wanted to find out why these people had chosen their firm and what their experiences had been. The goals were to gain insight into their target market and also hopefully to use some of the meeting footage and anecdotes in their marketing materials.

The meeting had a feeling of camaraderie and what each person had to say was very moving. Informally, they each told the story of their accident and how their injuries had altered their lives. Comparing notes, they gave outrageous accounts of their experiences with other lawyers, insurance companies and government agencies, often in great detail. They also expressed their gratitude to this firm for their hard-won victories, and they had nothing but wonderful things to say about their lawyers.

Discussing the project with the marketing manager afterwards, he told me that he was disappointed in the results. After waiting a week for the transcription, he found that wading through it

all was tedious. Furthermore, what had seemed interesting in the live meeting was boring in print. He also felt that the taping had given him a false sense of security in what was being harvested. His conclusion was that had he conducted the meetings with the end in mind, he would have structured them to capture what he was really after.

Typing Instead of Taping

As you may have already noticed and as you will see in the next section, technography is not the same as simply having someone type notes that you can see on a screen while the meeting takes on a life of its own. Staying true to our format of addressing challenges first, let's look at the realities of using a typist simply as a means of recording. Many people think this is a great idea. However if you want to glean anything from your meeting full of jokes, detailed discussions, ephiphanies, brilliant and not-so-brilliant ideas, presentations, stories, hissing, strategies, camaraderie, bottom-lines etc. there are a few pitfalls to avoid.

Let's listen in on a sales marketing meeting where the typist is tucked away at the back of the room. Jennifer says, "Well you see, I don't know if we got a great response with the email blast. I mean I think we did better with our Pink Elephant direct mailer last year. Remember?"

Frank does. "Wow, it was great, yah? The graphics rocked. Too bad we couldn't email those suckers this time but the files were just too friggin' big. They took forever to download. But these email bounce-backs, I don't know. They went on for days, like there were a gazillion of them. They totally flooded the mail servers."

"Yeah, you got that right," says Jennifer. "You know I have to figure that the spam guards must have a lot to do with it, eh? The IT people seemed to think we got around it but I'm not so sure. But that direct mail campaign was kind of pricey. The e-blast was way cheaper but then...."

Since we speak about five times faster than we type, your typist would not be able to catch all of this. Without direction, she would have to instantaneously decide on which twenty percent to type. You would either end up

reading fragments like "graphics rocked" and "gazillion bounce-backs," or at best, some but not all of the points which may or may not be relevant to you. Furthermore, the spoken language is not great reading and there are many different issues entwined in this few minutes of talking.

Now let's look at some readable notes from this scenario.

- Spam guards could account for the higher percentages of rejects in email blasts compared with direct mail.
- 2. IT issues need to be addressed including graphic file size and disk space on servers.
- 3. Email blasts are more cost-effective than direct mail campaigns.

Though you may be concerned about altering the pace of the meeting, in order to create useful, readable points from what is being said, some structure has to be implemented. At the very least, you have to stop talking long enough for the typist to catch up. They also need some direction as to what to type and you have to give it to them in bite-size pieces. And if you want it to be readable, it would be a good idea to tailor your speech to written language.

The Meeting Held Hostage by the Document

At the other extreme, fussing over the writing of notes has the potential of being a real meeting-stopper. This can be a details trap, a wily form of resistance and really boring. Even within the structure of The Plan, sometimes participants try to disappear into the mechanics of writing. They have to be rescued from editing, punctuating, rewriting and scouting for a note's perfect location within the document.

This is understandable given the differences between spoken and written language. Chances are you devote more time and diligence to a one-page letter of complaint or request than to a face-to-face meeting or phone conversation which is several times longer. Since only seven percent of communication is words, your letter has to pick up the ninety-three percent slack, conveying the

cheerful tone, feeling of disappointment or stern facial expression that says, "I mean it!"

Your objective is to create a readable set of notes while keeping the meeting on track. Somehow, your game plan has to make a quick and easy transition from the fruitful discussion of the email blast to a concise written note. "No, wait. There should be a colon after 'including." "That sentence doesn't read right. Change it to...." This puts the meeting into slow motion. "Let's see... 'rejects in email blasts compared with direct mail," Frank mumbles with his eyes glued to the screen. "This is an IT issue but it is also about sales so can we put in both places? No, wait...." This hits the pause button on the meeting.

Fortunately, The Plan's use of technography distills free flowing talk into succinct written words without altering the momentum of the meeting. In fact, the distillation process has the effect of clarifying meaning. As for "good English" while it is the speaker's own words that are transcribed, the technographer is skilled at spelling, grammar and sentence structure, and participants soon let go of concerning themselves with this aspect. The Plan also ensures that what has been written will be reviewed throughout the process, allowing for changes and edits. Curiously however, changes are rarely made because it is the right words which are finally recorded. Furthermore, the structure ensures a well-organized, written account.

Having a typist record a useful set of notes while being separate from the meeting structure and interaction is tricky. Recent high-profile criminal cases involving the questionable minutes of board of directors meetings illustrate this dilemma. Carter McNamara, PhD of Authenticity Consulting makes the point that legally you have to take minutes but there are no guidelines as to how to do it or what they should contain. Now more than ever, creating accurate accounts of meetings is crucial.

What the Technographer Saw Cut and Print Those Words

In working with some facilitators, I have often found that the notes either take too much focus and derail the meeting or they fade into the background where they cannot possibly be of any use. One facilitator became so fixated on the wording and structure of the document that the meeting became an exercise in writing and editing, losing its focus entirely. He would read the screen silently to himself while everyone waited patiently for him to make his next editorial decision. I knew we were in trouble when he had me painstakingly cut and paste a list into three different sections after much deliberation over where it actually belonged. Is anyone going to actually read this? I asked myself. And what about the sales strategies that they came here to brainstorm?

Trying to type notes without any direction or interaction does not work very well and we end up with incomplete, fragmented notes. If no one dictates verbatim, I have to pick out bits of what I think is relevant. If they want me to get it, they have to slow down or stop talking which they rarely do in animated discussions. I am sure studies have been done on how many words can be held in someone's memory before sliding down the chute to be typed. I think mine holds about ten if the subject is clear and I am able to focus.

Working with Ron strikes the right balance. Everyone can be fully engaged in discussion until the person who has the floor formulates their thought. At that point I type what they say in their words. If the person sitting beside me tries to get me to add to it or change it without the speaker's consent, my orders are to ignore them.

Sometimes it takes a few tries for someone to get it right and the others including Ron help them to express exactly what they mean. To give you an example, we recently facilitated a meeting for a successful personal growth company from California to plan their strategy for expansion into the Canadian market. They had done very well with their first series of two-day workshops and felt that it was time to really focus on growth. Along with their team of eight, they had invited Ted, a Canadian client and marketing professional, to give them feedback and insights into this new and somewhat different market. A lively group, their President had been through a personal planning session with us and they took to The Plan with ease and

enthusiasm, launching right into their challenges. Typical of any expanding company, the workload, budgeting and training were at the forefront.

When Ted's turn came, about fifth or sixth, he paused to collect his thoughts, and then came out with a very, very long string of words. Price point, competitive position matrix, perceptual threshold, value proposition, demographic and metrics were among them. The response was blank stares from everyone. Though I have worked many marketing meetings and have some familiarity with this sector's unique terminology and culture, I could not understand what Ted was talking about.

Ron, with his usual respectful, good-natured style said, "Ted, what do you mean?"

"Well, I think it is going to take some doing to convince Canadians that they are getting a bang for their buck here. I mean, the workshops are great, no doubt about it but how do you sell them for what they are worth?"

This was met with smiles of understanding as if the subtitles had been turned on. Ron then asked him questions for further clarification. Some discussion followed and everyone was very appreciative of Ted's input. The distillation in Ted's words were, "Our unique selling proposition is not clear enough yet." Everyone was happy including me, and the meeting proceeded with great results.

TECHNOGRAPHY— TECHNICAL STENOGRAPHY

What Is It and Where Did It Come From?

Throughout the book, technography has been demonstrated as an intricate part of every planning session. As the technographer types the participants' words, they are projected onto the screen for all to see. Technography, as the word implies is technical stenography. If we want to get technical about the word, technology is "the application of tools, knowledge and crafts by a species to control and adapt to its environment." This can include implements such as sticks and computers as well as systems like gardening and computers. Stenography is the process of writing in shorthand, from the Greek *stenos* meaning narrow

or close and *graphos* which is writing. So when we put all the definitions together, technography is shorthand using the technology of a computer system, a screen and a projector.

But technography, as we have seen, is much more than a handy way of recording speech. In our holistic process of planning, technography, The Plan, the document and the meeting are one and the same.

Bernie DeKoven, who developed the technique in 1985, sees meetings as a collaboration of people working together and technography as the perfect way to make it happen.⁸ He defines technography as "the collective employment of one person as computer operator for the purpose of arriving at the collaboratively-authored document. Technography," he says, "approaches meetings as an open system designed to serve the community that uses it: where the players are more important than the game, where success is measured in terms of participation, involvement and mutual accomplishment."

As we saw in the Henderson meeting, it was the collaborative aspect that reined in Freddy and brought Winston out of his shell so that both became valuable contributors. An unwilling participant, Freddy was first drawn in by reading the screen. He then used his turn to voice a challenge and eventually collaborated willingly in categorizing and prioritizing.

The screen becomes the surface of the meeting and the finished document a product of the group wisdom. Unlike a set of notes jotted down, everyone has ownership because they participated in its creation. Since participants can see themselves being heard in real time, they can see that what they consider to be important is included in the collaboration. This is very empowering both to the individual and to the group, who in turn takes responsibility for the work as a whole. Furthermore, when they meet again, it is very easy for them to pick up where they left off using the same document.

What the Technographer Saw Stenography in Motion

When I first went to work in a law firm back in the 80's there were still stenographers who took shorthand. "Joan, bring in your book," the Senior Partner would bark at his secretary of twenty-five years. Into his office she would march with her sharp pencil and small stenographer's notepad (the "steno pad") where the boss would rattle off a list of instructions — call these people about this and that, order this, get that, register this, file that and don't forget....

"Take a letter to Bill Burley over at RAM." The boss talked at normal speed as Joan's pencil pecked frantically at the steno pad like a hungry bird. When he finished speaking, Joan raced back into her office with pages full of curves, lines and dots. In high gear, she made phone calls, opened and closed file drawers, organized papers and typed letters (perfectly of course), her eyes never leaving her steno pad. It was amazing.

Before the days of dictating and recording technology, shorthand-writing systems were developed to capture speech phonetically using symbols. Used by journalists and secretaries, a well trained stenographer could write as quickly as people speak. Shorthand notes were temporary, intended for immediate action or for transcription. Where the old stereotype of the ditzy secretary came from I will never know. Taking shorthand was a highly developed mental and manual skill. I learned shorthand in typing school but have only ever used it to scrawl phone messages and food orders, reading them back in broken English. To me it was more difficult than learning computer programming or piano.

The Collaboration Tool

As a tool, collaboration has more gadgets than a Swiss Army Knife. Some components are concrete like the technographer, the computer, the screen and the software. Others such as the group which constellates in a planning session are less tangible but very powerful. Like solar batteries charging on a fine day, collaboration is the energy that the meeting gains which drives it to action. Since we have gone through the how-to's of conducting meetings,

let's look at the instruments of technography that generate collaborative power.

The Collaborative Group

Starting with a purpose, The Plan's process of identifying challenges, setting goals and building steps towards reaching them makes participants into a cohesive, motivated group that becomes its own consultant. Collaboration naturally builds a fresh group entity. Though the participants may work together in an organization on a daily basis, the new group that forms at the meeting has a power all its own. With the facilitator leading the meeting and all participants treated equally, this group is free from their organization's hierarchy and able to explore fresh opportunities.

As we saw in the Datastore meeting, Steve the VP was just another participant and Lenny the Project Manager became a strong player in taking steps towards a newly minted vision. The Ontario Energy Association's new group used its collaborative power to accomplish the monumental task of producing a single detailed position paper, crafted by otherwise disconnected individuals. On the playing field of the screen, a powerful team is built pooling each and every participant's talents.

An added benefit of the collaboration tool is that it identifies your team's strengths and weaknesses in a very truthful and respectful way. *Good to Great* by Jim Collins, which examines how the top Forbes 500 companies made that final climb to greatness, ranks team building at Stage 1. "Those who build great organizations make sure they have the right people on the bus, the wrong people off the bus, and the right people in the key seats before they figure out where to drive the bus." ¹⁰

The Greens who we met in Chapter 4 were at the end of their ride and they all wanted off the bus. In the Datastore meeting, rather than board Steve's consulting bus, Cheryl drove away in her own car. After a few transfers, Freddy eventually came on board the Henderson bus and stayed for the whole ride, while Winston, who had been

looking out the window, eventually took a seat in the front with the others.

In many meetings, bus passengers become easily identifiable to themselves as well as to others as The Plan progresses. For example, in our big restaurant chain annual retreat, the unoccupied Trainer seat was discovered and reassigned. In all five department planning sessions, training problems emerged through examining other issues. Franchisees were not properly trained and instruction materials for Operations were not useful. In the Developments meeting, through discussions and a few scary anecdotes, recurring employee mistakes were attributed to a lack of knowledge and inadequate reference materials. Though Human Resources scheduled training sessions regularly, the results in all departments were negligible.

With some probing, I found that there was indeed a training department which made its way into every action plan. "Meet with Training regarding standardized procedures for managers" was an important action step. But for all the innovation and dynamism in this company, training seemed to be a dead end.

Sure enough, Bob, the head of Training who showed up in the Operations meeting towards the end of the retreat, clearly did not want to be on the bus. Working with upper level management, I rarely encounter the disaffected and Bob's lack of enthusiasm and motivation was clearly out of place in this team-oriented company full of lively bus passengers singing camp songs. His response to the challenge of "Our people keep making the same mistakes," was "They should read the manuals." The challenges he listed when it was his turn voiced a profound discontentment with his job. Furthermore, in crafting the action plan he did not commit to anything.

Great companies, Collins points out, take care of who first and then what.¹¹ They are constantly compelled to change through expansion, technological advances, response to market trends and so forth. To do so successfully, they first need the right people. The Plan facilitates change and in the process also configures the

right team. On the brink of international expansion, the big restaurant chain needed an effective Trainer on the bus.

A new Trainer eventually came on board and a great internet-based system was implemented in collaboration with Operations, the IT and Finance department and Human Resources. Due to good communication and the right team, its benefits reached far beyond providing webbased training and resource materials. For example, it included online financial exchanges between franchises, the regions and head office. Moreover, with the company's website at the hub, it reinforced the corporate culture and the core values of the company on an ongoing basis.

An issue that contributed to this innovation came up in the IT and Finance meeting when the VP expressed his concern with the way in which franchisees were dealt with by his team. He regarded franchisees as valuable clients and felt that they should be attended to promptly and respectfully. His staff however, felt that dealing them was an addition to their workload, a diversion from their corporate accounting systems, not really their responsibility and quite frankly an annoyance. They did have a point in that franchises had been a recent addition to the corporation within the past five years and their accounting needs were an add-on with a lot of quirks. If transactions ran smoothly the franchisees were tolerated; but on a busy day when there were crises and deadlines, they were an added frustration.

Looking at challenges from other meetings, it appeared that this attitude was systemic. For example, the company's website's page on franchises was geared mainly towards marketing, reflecting the marginalized status of existing franchisees. In every department, head office was at odds with both the franchisees and the regions.

Throughout my career, the challenge that has been listed consistently in almost every meeting is communication. In fact, the core reason for people meeting is to communicate. Communicating the issues of training and corporate culture during the retreat led to a great collaborative solution of online training and web-based interactive systems for franchisees. The company also

allocated much needed resources, both financial and human to franchisees, building respect for them as clients into their core values and dedicating specialized people to work with them. A further pay-off for this innovation was that the company was well positioned in this regard for their international expansion. Stephen Covey's Habits 4, 5 and 6 were cultivated in this collaboration: "Think Win/Win," "listen until you understand" and "co-operate creatively." 12

As for the people who get off the bus, in my view it is to everyone's benefit, especially theirs. Stage 2 in *Good to Great* is "confronting brutal facts." This is what we do in the challenges stage, and as The Plan unfolds from there, the right passengers seem to reveal themselves.

"Retain unwavering faith that you can and will prevail in the end," says Collins. If you are on the wrong bus, you are going in the wrong direction! Both Cheryl at Datastore and Bob the Trainer needed the opportunity to get themselves on the right bus and The Plan enabled them to make that change.

The Politics of the Collaborative Group

In a group of any size, politics are often a concern regardless of how subtle they may be. When a group comes together for a planning meeting, participants may wonder:, "Am I safe in expressing an idea or an issue which may not fly with the higher-ups, subordinates or other departments? Should I be aware of alliances and oppositions? Do I really have a voice?"

All groups have a mandate, values, goals, leadership, power dynamics and ways of doing things. They have policies on how decisions are made: some by consensus, others by leadership or committee. Furthermore, as we are all part of many groups — family, work, religious, recreational, neighborhood etc. — we know that politics are inevitable. The success and health of the group, however, depends on how well it maintains a political balance and progresses in keeping with its mandate.

With The Plan, politics rarely have a chance to become an issue. We have a system of checks and balances!

Since the purpose of the strategic planning meeting is to get things done, we only need to be concerned with the most efficient way to bring out the best in everyone and reach goals. The process of The Plan and the collaboration in which everyone is heard fosters equality in the new group that has formed and makes it impossible for any politics from beyond to take root. As we have seen, the only leader is me, the facilitator, more of a chauffeur than a figure of authority, and everyone expresses themselves equally. Decisions are made neither by leadership nor by consensus but somewhere in between.

Are meetings democratic? Lawrence Magid of the LA Times does not think so. "Technography itself is empowering but not necessarily democratic; it's more like an efficient marketplace that lets good ideas float to the surface – and then efficient marketing enables them to be sold to the group." ¹³

In the Henderson meeting, I was initially concerned that the attendance of the Executive Partner, Michael, might create a political imbalance. In our preliminary meeting, I expressed my misgivings that "The Chief" sitting in on the meeting might inhibit the participants, much like the Principal sitting at the back of the classroom. John told me, however, that this was not negotiable, and that one of the Executive Partners had to be in on everything. During the early stages of the meeting itself, I wondered if Michael's presence may be contributing to Winston's reluctance and Freddy's acting out.

My doubts were put to rest when Michael quickly became "just another participant" expressing a challenge when it was his turn. Furthermore, it became apparent that his influence as a rainmaker was key to the team's success. As the firm's major influencer, with the team functioning well, he would bring business their way. Being part of the meeting put him in a stronger position for pitching their talents. Presenting this perspective in the meeting Michael was not the top banana but an equal participant on the Manufacturing Team whose ideas would be worked with or not.

The Technographer

Now that you have met the technographer, let's look at her part in making collaboration happen so effectively. Since both my technographers to date, Sue and Pat are women, I am going to refer to the technographer in the female gender. Ideally, the technographer is neither a participant nor the facilitator. The technographer frees everyone else to focus on the purpose of the meeting. She types the notes in the participant's words and moves them into categories, which she then prioritizes as instructed. She is responsible for the document. At the end of each section, she prints and distributes drafts, and at the end of the meeting, emails a copy of the final document to everyone. She also converts the action plan to a format that can be uploaded into scheduling devices or software of choice.

The technographer's skills are that she is a fast typist, her spelling and grammar are excellent and she maneuvers the outlining software with ease. Furthermore, she is acutely focused and types exactly what the participant says. I have also come to rely upon my technographer to take care of the technical details of setting up the equipment, backing up files etc. as well as some of the more subtle meeting details like reminding me on those extremely rare occasions that I have missed something or someone.

Patricia refers to herself as the professional fly on the wall, taking pride in the ability to be invisible and invaluable. Like the good wedding photographer, what this means to the participants is that they do not have to wait very long for their words to appear on the screen and they quickly let go of checking that what they said is typed correctly. Attentive to the meeting, as we read the notes, prioritize and categorize, she moves information around quickly and keeps the screen readable by scrolling, collapsing and expanding text in sync with the speaker.

Outlining Software – The Racing Car of Software that Makes It All Possible

Outlining software, as we have seen from our meeting notes, gives order to the document very quickly as the meeting progresses. Each note is given an "address" as it is typed, indicating its level or heading rank and its chronological sequence. For example, B.3 indicates that it is the third item or subheading under the second main heading B. These levels can be shown (expanded) or collapsed (hidden) as the meeting focuses on different areas, keeping the screen tidy and readable.

Using the mouse to drag and drop or keyboard shortcuts, addresses change as notes move to new locations. Moving text is so quick that categorizing and prioritizing happen instantly.

Addresses – Chronological Numbering and Heading/Subheading Levels

Let's look at the format of the document that is effortlessly created and changed. The outline gives us the advantage of organizing and moving ideas and thoughts almost as quickly as they are stated.

▼ A. CHALLENGES

- ▼ 1. The email blast caused technical problems.
 - a. did not get past the spam guard
 - b. slowed down computer network
 - (i) graphics were too big
 - (ii) the quantity was too large
 - 2. Sales are down from last year.
 - 3. We have not seen sales from the email blast.

▼ B. GOALS

It is now December. We are pleased.

software assigns an address to each note identifying the level and sequence. To change levels, drag left or right. To change sequence or order, drag up or

down.

Outlining

- ▼ 1. Our recent sales campaign was a huge success.
 - a. We got great feedback.
 - b. It was cost effective.

Hiding and Showing Levels of Text

The notes in each level can be shown (expanded or promoted) or hidden (collapsed or demoted) for easy reading. Here, while working on the Goals, we hide all levels under Challenges.

A. CHALLENGES

► Inspiration indicates that there are hidden levels.

▼ B. GOALS

It is now a year later and we are thrilled.

- 1. Our recent sales campaign was a huge success.
- 2. Sales have increased 90%.

▼ Inspiration indicates all items in this level are shown.

▼ A. CHALLENGES

- ▶ 1. BUSINESS
- 2. SALES
- 3. TECHNICAL

Categories have become the new Level 2 and all notes under headings are hidden to make prioritizing easy.

What the Technographer Saw Outlining Software At Its Best

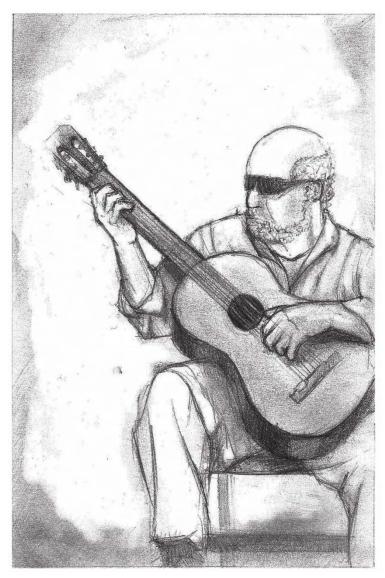
At RT Planning Strategies we use **Inspiration** software, an inexpensive, simple program dedicated to planning. Though Bernie DeKoven and others use Microsoft Word's outlining feature, I prefer Inspiration. A specialized program, it is visually appealing and the few icons at the bottom of the screen are all you see and all you need. Want to change the numbering style or zoom in? Click. Moving text is quick. You drag it up and down, left and right while a little red arrow indicates exactly where it will land when you drop it.

When a room full of people focused on the screen are giving instructions, the last thing I want to do is fuss with software. "Can you make that name bold?" Sure. "Move '2. Ordering online..." under '5. Web Sales have increased.' Make it a sub." Done. "Now, how about moving..." It's there. It has to happen instantly on a simple, attractive screen with a minimum of mouse action to keep pace with the meeting.

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I have worked meetings using Word but it was not as slick as Inspiration for moving text around and changing formatting. Though I have used Word extensively since it was born, my nerves rattled as I got unexpected results, fussed with formatting styles and felt the silence as everyone waited for those extra mouse clicks needed to make a change happen. Another problem was that because everyone uses Word, the participants felt they had to instruct me on their ways of doing things as if I were driving their cars. It seemed to transport them back to their own computers. "Just hit F4." "Click here, move there," they offered as they became involved in the mechanics.

Outlining software transforms the meeting into a group project as everyone creates the document. After a morning of working hard at identifying challenges and goals, often anticipating a much-needed break, you would think that people would be too tired or impatient to go through the stages of categorizing and prioritizing. Curiously, however, they pull together with enthusiasm. There may be a list of wildly contradictory challenges but everyone seems to agree on where each one belongs. Knowing that challenges and goals can be identified, managed and acted upon is very empowering and perhaps a great relief. As the group leaves the room for lunch, what had been overwhelming when they came in is neatly ordered on the screen.



You've learned how to use the guitar; learned how to string; tune and strike the proper chords; learned the feel of the strings and frets beneath your fingers. After practicing, learning, and practicing again you are ready for the final performance. It is the same with strategic planning. The only way to achieve your goal is by effectively learning, practicing the key steps, and incorporating those steps into your business so the results are music to your ears.

LETTING IT HAPPEN

FROM GLOBAL POSITIONING TO YOUR DESTINATION

ne of my clients compares The Plan to the Global Positioning System in his car. It tells him – literally – where he is and how to get to where he is going. "Proceed five miles and turn right on Elm," the robot instructs. With the document they created in The Plan process as their map, his company had the trip ticket they needed to reach their target. The two components that ensure that you stay on track are the action plan and the commitment to revisit it and update it regularly. Whether you schedule regular revisits or meet as needed – maybe when you find yourselves in overload once again – you can accomplish a lot quickly with the foundation, the document and the action plan you have built.

Crossing the Finish Line with The Action Plan

The action plan is the third and final stage of The Plan. Though we have looked at it before on its own, the context of collaboration shines a brighter light on it. "Being Pro-Active" is at the top of Stephen Covey's list of *The Seven Habits of Highly Effective People.* This is also the purpose of The Plan. After working through challenges and goals, the

action plan is relatively quick and easy because order has been made out of chaos and collaboration has built a proactive team.

Perhaps the most important part of planning is that you figure out what to do and how to do it. As we saw with Art's brainstorming meeting, without committed next steps, all that clarity turned cloudy on the very next business day. It is also important that you keep the action plan simple. While we work back from a goal a year or two in the future, we only plan actions for sixty to ninety days ahead so that the steps we take are realistic, manageable and the right ones. As our own consultants, we leave the meeting with a plan to plan.

Stage 3 in taking a company from Good to Great is disciplined action. Collins compares this step to a flywheel. "There is no single defining action. Rather the process resembles relentlessly pushing a giant, heavy flywheel in one direction, turn upon turn, building momentum until a point of breakthrough and beyond."

In The Plan, the goal is that point beyond the breakthrough and the action plan is those first few turns that start to build the momentum. Planning steps into the foreseeable future makes your strategy realistic and prevents you from building pie-in-the-sky plans which may or may not happen. If you are truly being innovative, doing things differently and taking risks, you need to adjust and correct your plan often rather than box yourself into an elaborate, detailed, far-reaching, untested plan.

Let's look at a simple action plan using the marketing campaign example. The issue is that sales are down from last year. The goal is to increase sales by fifteen percent in the next year. The action? Ask the question, "What is one thing you can do within the next sixty or ninety days to improve sales?" After some discussion about their product, their company and their industry which confirms that they are well positioned and that they believe in what they are doing, they come up with a few ideas.

One is that they can analyze their client referral sources to figure out which has yielded the most prospects.

They agree to talk to their existing customers, check their contact management databases and look in their files. Frank offers to spearhead the project.

Next, they decide to plan a Thanksgiving promotion. They need more time and input to figure out whether it will be a discount or a loss leader. Jennifer is on the case. Rather than going into the details of how each of these strategies will work, they keep it simple, they allow for flexibility and they only make promises they can keep. Their action plan looks like this:

Make a list of customer referral sources. -FRANK-18SEP Plan a Thanksgiving promotion. -JENNIFER-22SEP

Multiple and extensive goals require a lot of planning and many steps. The initial action plan gets you going, simplifies your projects and steers you in the right direction. As you can imagine, the big restaurant chain retreat consisting of seven meetings and five departments spawned many actions. Beginning and ending with corporate meetings attended by the President, the CEO and the five VPs, each department in turn held its own meeting.

Of course, there were a lot of overlapping issues. Every department needed to communicate with every other department about something, which they built into their action plans. Furthermore, while Jack the President did not attend the department meetings, he needed to know which actions concerned him when his VPs reported to him. What actions had been planned, who committed to them and what deadline did they target?

The action plan was a great resource. Jack could see that Branding and Marketing was committed to a radio promotion by December 1st, that the new location for their pub in North Bay, Ontario would be found by November 1st and that John would have the new menu for the Italian chain by January 1st. Operations felt that a visit from the President to the booming Western Region was long overdue, which was communicated to Jack in the Operations action plan. Being of the old school, this meant that Jack's secretary noted the actions in his daytimer and

scheduled appointments for progress reports with the people responsible.

While the action plan consists of the first steps towards the goal in the immediate future, it can also be an important reality check. For example, when we sorted the Branding and Marketing action plan, we found that Sam, the VP, had committed to so many actions that he would have to give up sleeping and eating to get them done. In a matter of minutes, we were able to rework it by delegating and by adjusting deadlines so that his commitments were manageable.

Putting all the action plans together became a valuable resource beyond the retreat as well. Not only was Jack able to see what had been planned in each department but also employees who had not been involved in the retreat could see where they fit into the overall plan. For example, while Human Resources did not have its own planning meeting, it appeared on many action plans. "Meet with HR regarding the development of Franchisee specialists." "Retrain or hire." and so forth.

The Finished Product and Beyond

The finished product is the document in three formats.

- A hard copy in a binder that you take with you when you leave the meeting. The action plan is sorted in chronological order.
- A copy in Microsoft Word sent to you as an email attachment.
- The action plan in a format that can be uploaded to programs such as Excel, Access, Mindjet and project management software.

The technical explanation is that the action plan is converted to a .txt or .csv file with four fields: the number or address of the action; the action itself; the name or initials of the person who committed to it; and the completion date. This makes the action plan "smart" and flexible. Once uploaded to an Excel spreadsheet for example, the actions can be sorted and grouped by person or by date and expanded upon. For example, the plan hatched for collaborating on a franchisee user interface and online training was passed on to an in-house project manager who uploaded the action plan data into his software of choice. This got them started. Action plan data also found its way to Blackberries, Palm devices and FiloFax datebooks.

"Disciplined people who engage in disciplined thought and who take disciplined action – operating with freedom within a framework of responsibilities – this is the cornerstone of a culture that creates greatness. In a culture of discipline, people do not have jobs; they have responsibilities." This is Stage 3 of Good to Great. The action plan is a great tool for great workmen.

Meet Anywhere Anytime With Internet Meetings

The first time someone joined a planning meeting via the Internet was really exciting. Back when the technology was relatively new, this provided the perfect solution and saved a lot time and money. In the midst of rapid expansion out west, Jason, the big restaurant chain's Regional Manager was faced with issues that required more strategy than the scheduled one-day meeting could comfortably accommodate. Operations clearly needed another half-day session but Jason's schedule did not permit him to fly from Calgary to Toronto again the following week. That was when the Internet meeting light bulb went on.

The meeting was scheduled for two hours later for Jason. My technographer and the IT guy spent an hour setting up and testing the connection with Jason, running into one problem after another. Nevertheless, at 1:00 sharp Eastern Time, Jason was checking in on the speakerphone and reading what was being typed on the screen. We were

all thrilled and we picked up where we had left off in the previous meeting.

As the meeting progressed, some adjustments had to be made for our virtual participant and since then I have learned a few things about how to adapt. Enthusiastic, warm and pro-active in the live meeting, Jason quickly faded into the background when his presence was virtual. I guess I was partially responsible because I skipped him in the first go-around and I neglected to draw him into a few discussions as I would have had he been there face to face.

Participation was different from his end as well. He spoke only when he was addressed. Furthermore, background noises of doors opening, a dog barking and children's voices suggested that we did not have his full attention. All in all, however, I would qualify it as a success. By the end of the meeting, we had addressed his need for another manager and the VP had scheduled a trip to help negotiate real estate deals. The meeting had achieved its purpose but there was no doubt that the new medium required a slightly different approach.

Three years and countless Internet meetings later, as a facilitator I have found that keeping groups connected virtually requires a different focus than live meetings. Dr. Albert Mehrabian, Professor Emeritus of Psychology at UCLA, who has pioneered the understanding of communications since the 1960 analyzes face-to-face communication as follows: "Meetings are effective because the written word only carries 7% of the true meaning and feeling. Meetings are better than telephone conferences because only 38% of the meaning and feeling is carried in the way that things are said. The other 55% of the meaning and feeling is carried in facial expression and non-verbal signals."15 Therefore, without the visual contact. communication among participants is more difficult.

There is a fine line between multi-tasking and attention deficit disorder. The temptation for the virtual participant to do other things while attending the meeting must be taken into account. During one of my first Internet personal planning sessions, the client gleefully explained

that he was in his bathrobe cooking breakfast! Even with webcams where you can see each other, individuals are in their own space and the virtual meeting does not automatically put the group on common ground.

What I have learned is the importance of keeping the attention focused on the computer monitor. While the screen is the centerpiece of a face-to-face meeting, lively discussions and other activities which draw the attention elsewhere from time to time do not affect either the meeting's momentum or the group entity. In a virtual meeting however, the screen is the connector which holds participants' interest throughout the meeting by being attractive and dynamic. We start with a PowerPoint presentation and sometimes we show relevant pictures and animation. Furthermore, the pace of participation is quick, making it easy to stay involved. We also avoid many of the features of Internet meeting software that are distracting. For example, we discourage participants from using the messaging feature with each other and we do not give control of the screen to a participant.

Revisiting The Plan

The strength of The Plan is that it continues far beyond the meeting because it is so easy to pick up where you left off. The seventh of the *Seven Habits of Highly Effective People* is "renewal", the self-maintenance habit. Renewal, growth and change are built into the document you created, particularly the action plan. All you have to do is project it onto the screen and carry on. This is actually where I find Internet meetings very useful.

Meeting face-to-face is still the most effective way to make plans and strengthen a team, but once your group is established, the Internet is a great way to revisit the action plan or include a participant who cannot be present otherwise. For example, if your action plan is in Excel format, three months later you can connect on the Internet, add a column for the current date and check in action-by-action, person-by-person or in chronological order.

"DONE" is a very satisfying entry. You can also continue brainstorming as projects grow and change. Like the rocket going to the moon, this is how you self-correct to stay on course and hit your target.

What the Technographer Saw From Molehill to Mountain

Watching Ron help people who really believe that the sky is falling is almost as magical as long-range planning for successful corporations making millions. In his pro bono work, he has guided high school students to their careers and the unemployed back to work. With both of these groups, Ron the entertainer, risk taker and compassionate guy gets full rein to empower people and connect them to their hearts' desires.

A networking organization dedicated to assisting executives in career transition asked Ron to speak at a meeting, never imagining that they would be greeted by someone in a prison inmate's orange jumpsuit. My heart went out to the room of twenty men and women of varying ages who did not go to work that day. There was little interaction between them and no one looked very happy. As a new member nervously stood in front of the microphone to give her introduction, what her words said was, "I'm Helga. I have an MBA and I was the Human Resources manager for a large IT company that moved offshore." What her fear screamed was, "I'm going to be a bag lady, and I know it, so you might as well bring on the shopping cart and toque right now!"

This was a crash course in the Laws of Attraction or rather how to attract your worst nightmare. The next gentleman to speak had owned a small chain of camera stores which had not survived the mass transition to digital. Very self-conscious, as if he had personally designed his own demise, I wanted to get up and scream, "It is not your fault. It is change. You'll be fine." This was where Ron came in.

When Ron took the floor, he introduced himself, made some jokes, asked people if they knew why he was wearing the prisoner's suit and completely changed the atmosphere to joy. As he took off the jumpsuit, he explained that our own minds keep us imprisoned and that getting out is as easy as pulling apart the Velcro fasteners. Then he pulled out a large, clear plastic container and said, "This is my

mind. It gets filled with all sorts of things." As he threw in a golf ball he said, "This is an idea I have." A tennis ball went in. "This is some advice a friend gave me." A little soccer ball. "This is a big worry I have," and so on, until the container was overflowing and balls were rolling all over the floor. Everyone was laughing and making comments to each other as he continued to show how easily we go into overload.

When the time came to demonstrate a planning session, Ron picked a shy looking man of about thirty to volunteer. An engineer, Remi had worked in England but was having difficulty finding his footing in Canada. His issues were that the one-year contract, which had recently ended, had yielded no leads; he felt that his lack of Canadian experience was an unfair handicap, and he was concerned that he would soon be running into financial difficulty. Ron's genuine interest and humor brought out Remi's better nature. He relaxed and became more confident as Ron invited the others to join in helping him strategize. Another engineer offered suggestions, some discussion took place on the best banks for lines of credit and they groaned good humouredly about "interview burnout". Remi had gained confidence and the group had connected and lightened up.

It was interesting to see the change that had taken place by the time Remi prioritized his goals. Once his financial worries and his feeling of being undervalued had been voiced, his goals revealed his desire to throw himself into a cutting-edge project. Traveling and rock climbing were also in his plans and finances which had topped his list of issues was far below his goal of climbing the Andes.

Yet again, the way in which Ron transformed Remi and the group was magical. With the action plan, Remi's sense of determination emerged. He received valuable input from the group and hooked up with a "check-in buddy" to revisit the plan in a week's time. Amazingly, it all took place within an hour and a half and gave him a map to the top of the mountain.

You Alone Can Do It But You Can't Do It Alone

Now you know how to achieve anything that you can imagine. Envision it and make it happen. Staying on top of the chaos by working your action plan, you become the person, the team and the organization that attracts what you want. Stage 4 in taking a company from good to great is building greatness to last, "clock building, not time keeping." The Plan is the tool to build the momentum to reach your destination of greatness. I know you can do it.

ACKNOWLEDGEMENTS

It was a revelation to write this acknowledgement. It made me very **aware** of how many people have affected my life in a highly supportive way. So, I am taking this time to express my deepest appreciation to each one of them. Please join me to share my thanks.

Who do you thank first? After careful consideration, I am acknowledging myself. Personal acknowledgement is something we all can do and with humility. Without my interest and desire to indulge in this Endeavour, no one would have gotten the opportunity to learn about what I have discovered.

The Almighty Spirit – Thank you for waking me up recognizing the value of celebrating every moment.

Mother and Dad – It is a blessing to acknowledge both of you. It is a blessing to say I am one of your three sons. With a tear in my eye and a pang in my heart I thank you with the spirit of a good son for all you have done. I continue to realize how much you sacrificed and did for us. A Breakthrough in Strategic Planning is a gift I give to your spirits.

Roz – Thank you for giving me the opportunity to be a corporate chauffeur. This experience gave me the epiphany to what I love to do – talk with people. This resulted in my training to become a strategic facilitator.

David, my dear brother – Thank you for giving me the chance to practice my profession under your tutelage. You recognized that I could be a professional at working with individuals and teams alike to help them bring focus and clarity to their lives using the approach you invented.

Lenore (like a sister) and my brother Harry – Yes, Lenore and Harry. Tough love. I realize that the challenges you have experienced with your kid brother over the years were not easy. I am a work in progress. Thank you for <u>all</u> the support!

Uncle Burke (just turned 80) – Thanking you is a book in itself. One thing you taught me that is making a major difference is to encourage my clients to experience future success, now! – the key to a successful planning session. Thank you for the lesson.

Uncle Sid – There is a wonderful story in and of itself that I would love to tell about your support both financially and emotionally. Who would ever have thought, especially myself, that you at 89, my partner, mentor, and motivator, would be so eager to see my book in print? Well here it is! Thank you.

Aunt Fran, Uncle Dan – For being there, thank you.

My wonderful cousin Arei — For your ever-constant unconditional love and encouragement that I have a wonderful and valuable gift to share with the world — I love you. Thank you.

Aunt Min (and oldest client at 92) – Thank you for trusting me to help you develop your part-time business that you so enjoy today. And thank you for your emotional support when I need it.

To my friends – Terry, for being there. Robert, for your brotherly conversations and explorations, thank you. Minerva, for the value you brought to the process with your energy and suggestions. Angela, for your sisterly coaching, love and friendship. Plus, thank you for introducing me to my now Shaman brother, Dan. Dan Whetung has been my spirit guide and friend during the writing of this message. Nathan, a friend and confidant like no other, when it comes to having wonderful discussions to help me express myself most effectively. Thank you.

Michele, my first client – Thank you for your encouragement. Thank you for introducing me to David Courchane. Living with David and First Nations people changed my life to recognize the value of just being with people. This gift has helped me enormously when I sit with clients.

Rene – Logistics Manager *par excellence*. Thank you for bringing the value of 'taking care of the space' when we facilitate planning sessions. This is another gift I want the world to get with reading *A Breakthrough in strategic Planning*.

Phil Johnson – Thank you for trusting me to help your clients get greater clarity and focus that is enhancing the value of your Master of Business Leadership coaching program. What we do is so complimentary; it is exciting to work with you.

Robert Kiyosaki – Your acknowledgement of recognizing my intelligence still rings clear in my heart. The programs you facilitated are a foundation to how I present my sessions so effectively. Thank you for all the enlightening perceptions you taught. I look forward to the moment when we can sit and invent

a future together. And, thank you the value of doing something – taking action - DEMONSTRATE. Demonstrate, demonstrate, and demonstrate!

Marcia Martin – Your training workshops have given me the practice and guidance that magically help me facilitate at the highest level, both in individual and corporate presentations. Thank you.

Dr. John Thornton – Thank you for your wonderful insights and encouragement. Your testimony to the value of what I am offering to share with the world is most appreciated. A Breakthrough in strategic Planning is the results of the work we are doing together. (www.theprayerwheel.com)

Rosie Wartecker - If it weren't for you, I would have not realized how good I am at facilitating strategic visual planning sessions. A Breakthrough in Strategic Planning may have only been a conversation. Thank you for the opportunity to work with you and the board of The Tourettes Syndrome Foundation.

Bernie Jones – Thank you for allowing us to help you launch The Ontario Energy Association. Also, thank you for asking us to facilitate the planning of writing policy papers. Thanks to you, A Breakthrough in Strategic Planning is even more valuable to organizations when they want a plan fast.

Bill Drummond – who has been supportive of our process since the beginning. Bill recognizes the value and benefit of using The Plan to explore launching new ventures on several different opportunities. Thank you for identifying the value of 'rehearsing' a venture in a safe environment - a planning session, instead of blowing your fortune in the real world.

Ken Moore – who would have ever thought that a serendipitous meeting at St. Joseph Health Centre would lead a wonderful friendship. Then you read A Breakthrough in Strategic Planning to learn about my business. Wow, another series of grammatical edits. I hope my 'thank you' is received the way I am stating my appreciation to make A Breakthrough in Strategic Planning a wonderful read.

Eric Whaley – who, through an unexpected meeting thanks to Uncle Sid, gave me those wonderful suggestions to make A

Breakthrough in Strategic Planning a more interesting read, especially for the business professional who is interested in corporate planning. And, thank you for reminding me about adding graphics to give a visual representation to the importance of planning and self-correction.

Brittany, the sunshine in our office – What can I really say, except, THANK YOU. Your willingness, enthusiasm and competence in your diligent effort to support the editing of my first book *A Breakthrough in Strategic Planning* is very much appreciated.

Praise for The Plan

I must admit it. I came in with some doubts about the process. It's hard to believe something so simple could also be so profound, but it was, in spades! As you know, I'm now on a path looking to implement a long-forgotten goal. The difference is that I now know HOW to get there!

CityTV Former Education Reporter and Breakfast Television News Anchor

The visioning results that we got helped to guide policy development at the Association level. A key strength is that, although participants may come from different industry sectors and several levels in the senior ranks, the process ensures that everyone has equal opportunity to participate. It says "Here is the path, and as long as we are all prepared to walk and strategize together we will get somewhere."

Bernard Jones, Founder and First President (retired)
The Ontario Energy Association

What I found most useful is that all input is visible and accessible to participants. This enables people to constantly recycle, resort and reanalyse information as new information is added. The information displayed also enables a consensus to be developed on both general and specific issues. The democratic process is wonderfully engaging and involving and even people who do not normally speak up in meetings are inspired by the process. All conversation tends to be focused towards an action plan which then becomes a permanent resource for the company.

Juris Silkans, Former President, Alliance Atlantis

I am an unabashed fan! Six years ago I used the process to design a five-year plan for myself. It worked! All of the goals I had set at that time have been accomplished. Your process is enabling me to manage the complexities of my life, rather than be immobilized by them. Thank you so much, Ron. Your process has saved me months of confusion. It has helped me to set a course for my future which I love, not just one I have to accept. The Process is well worth the investment.

Arei Bierstock, M.S.W.

I cannot thank you adequately for the opportunity to participate in your highly original and extremely valuable personal program. Not only was it technically well designed, it was complemented by your endearing and non-threatening comfortable manner. I have already made significant changes in my professional plans and activities. Your process helped me to identify a series of both short and long term goals. I genuinely believed that my goals were well known to me.... Boy! Was I mistaken. The ability of your technology to identify the obstructions and bottlenecks to change is indescribably invaluable.

Walter Himmel, M.D., C.C.F.P. (E.M.)

I found the process straightforward, elegantly simple and not focused on pathology. But perhaps most important was this the speed at which results were obtained and specifically tailored to the individual concerned. It has the potential to eliminate procrastination and give a person a plan to start working on straight away. The process is very flexible and could easily be applied to a wide variety of situations. It could be used in life planning for adults and for teens as they prepare to leave school. It could also be of value in certain clinical situations. I am also aware that the process has already been used successfully with groups and has many business applications.

John Rossiter Thornton, M.D. FRCPC, Psychiatrist Author of THE PRAYER WHEEL Program

I had spent sixty years of my life as a professional actor, but had gradually turned to stand-up comic. This I still find very satisfying, but I missed the opportunity to play another character in the company of other actors. Since I am so identified with my comic character, Charlie Farquharson, this can be a bit frustrating. The Process involved me expressing my almost subconscious wish and bringing it to the surface with great clarity. I felt considerably lighter in spirit when the session was over. There have been results. I am scheduled to appear in a film, and I have also been asked to play the character of Matthew Cuthbert in an international tour of a musical that I wrote called "Anne of Green Gables". I would never have thought of casting myself in this role, but I accept it as a positive challenge. I am grateful to my friend Ron Tabachnick for his interest in my secret longings.

Don Harron, "Charlie Farquharson"

We are indebted to you for making order out of chaos and forcing us to channel our energies when we didn't know how. As we recover from the unfortunate events that have occurred in our community, I would like to thank you for helping our businesses develop a vision of their future and creating a road map for achieving that vision.

Richard A. Lekx, President Walkerton & District Chamber of Commerce

I had been actively engaged in my career search for several months and was looking to validate my search techniques and the effectiveness of my plan. I was very impressed with your organization's ability to focus on the desired net goal, and work backward to analyze my methodologies and progress objectives. Thank you again for the time we spent. It demonstrated an excellent process for analyzing my challenges and presenting a viable solution.

David Walsh, Former VP Marketing, Ingram Micro Inc. (Canada)

Your innovative strategic planning style has enabled us to envision ourselves as an organization that will grow to be self-sustaining and meet all its clearly defined goals. Your future projection strategy has given focus, commitment and motivation to our Board of Directors. We now know where we want to go and how we are going to get there. The focus and commitment has resulted in our organization achieving he necessary changes to move forward. Those who attended the workshop have said how much they enjoyed your style of facilitation, your obvious expertise in problem solving and your skill at responding to the many concerns and questions we had about our future as an organization.

Lori Di Ilio, Former Executive Director, The Canadian Society for Mucopolysaccharide and Related Diseases, Inc.

The speed of the result and the actual take home work plans at the close of the meeting remove the dreary aspects of report preparation before work can be started.... People leave the meeting after four hours with clear expectations of what they and others have committed to do. In today's business environment the importance of people prepared for action and obtaining results cannot be underestimated.

Nancy Green, Industrial Consultant. HRDC Canada

As we know, everything in life is timing. My exposure to, and use of, your process came at a later stage of my business career. I view this as unfortunate, because of the many positive benefits that it brings to project management, consensus building and strategy. I initially used the process as a consensus-building strategic planning tool at the board level of metal forming company that was in difficulty. The board and the operating people were on different continents and there was no clear company strategy. The process created a strategic plan and consensus was developed between the board and the operating people. Employing "the plan" the company got back on track, increasing both revenues and shareholder equity.

Part of the revenue increase was a result of improving relations with a major customer. When I joined the company, relations with this customer were at an all time low. A planning session, which involved key operating people from both companies, accomplished a mutual understanding of each other's goals. Several months later, the customer's Senior V.P. & G.M. told me that had we not taken this initiative, they would have looked for another supplier. This relationship is even stronger today.

Frank Hovey, President, Lystek International Inc.

After working with consultants on other projects, I realized I like The Plan because it is a very tight and disciplined structure. Most managers and entrepreneurs are not necessarily experts in planning, execution and implementation. This is a really good tool to develop a road map for success. Planning has become increasingly more important, as we continue to grow at a very fast pace. Things we used to be able to do as a small business, we can no longer do. We have to really set goals and work towards them. Also, it is absolutely important for the executive to have buy-in from the team. When you have a vision that excites the employees and galvanizes them, they will work for you because they want to work for you. We want to stay #1!

Ken Laird, President, Agincourt Autohaus Inc.

The Plan process provides additional clarity and direction when compared to my former method, writing goals and desires on a sheet of paper and expecting things to happen. It is the most realistic and viable tool I have ever seen for developing the spirit, focus, methods and programs for a team environment to achieve common goals. It also opens up unexpected personal dimensions. Afterwards, I felt I knew more about myself than ever before. I had a very clear picture of myself and my future self.

Ken McDonald, Associate Broker Commercial Division, Colliers International

We have used the process on four different occasions. The results were significant. In each case the participants felt engaged, the traditional system opened up and communications were speeded up. When you involve your staff having "a say" in any organization they feel empowered and the system becomes more democratic. The half-day workshop was very effective in clarifying our goals, hurdles and coming quickly to an action plan.

Peter Robertson, Former Mayor of Brampton, Ontario

Your emphasis on starting with the end in mind and working backwards is a concept and process that is powerful yet simple.

Kathryn Sabo Executive Director, Executive Advancement Resource Network (EARN)

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WHERE TO FIND US AND INSPIRATION

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www.RonTabachnick.com

FOR TRAINING IN TECHNOGRAPHY AND USING INSPIRATION PLEASE CONTACT US.

NOTES & INDEX

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- ² "Beautiful, Beautiful, Beautiful Boy" from Double Fantasy album, Geffen Records, 1980.
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- ⁷ Carter MacNamara, Authenticity Consulting LLC. "Minutes are considered legal documents by the auditors, IRS and courts, and they represent the actions of the board. Many assert that if it's not in the minutes, it didn't happen.

There is no standardized level of content and format for board minutes. In courts, as important as what you did is that you were reasonable when you did it. Therefore, sufficient information should be included to describe how board members reasonably came to reasonable decisions."

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About The Author

Ron Tabachnick The World's Foremost Strategic Facilitator

After 11 years trailblazing as a strategic facilitator, Ron Tabachnick has put into print his breakthrough tools to guide people to be more effective at expediting their plans.

A Breakthrough in Strategic Planning, is a much needed advance in a field that is often viewed as inefficient, ineffective and often a waste of time. Ron has been featured in The Globe and Mail Report on Business, The Toronto Star, The Toronto Sun, Rogers Cable 10 and a frequent guest on CityTV in Toronto.

Ron facilitates strategic planning meetings for senior executives in the areas of banking, data-processing, automotive, engineering, business development, marketing, corporate retreats not-for-profit associations, the Federal Government, launching new ventures and has specialized in facilitating high powered boards of directors meetings.

He has made it a personal mission to bring the power of corporate planning into the lives of individuals to provide focus, clarity and direction in their lives.

The latest application of his 'fat-free' process is facilitating Virtual Planning Meetings with executives in different parts of the world utilizing leading edge internet technology.

Ron has applied his over 40 years of vast business experience, theater training, and extensive personal development to spread his message that anyone can change the speed and impact of their actions through proper planning. His methods unleash the power people and

corporations have been squandering through a lack of clarity and focus in direction and action.

Ron, has a Bachelor of Science Degree with a major in Biology from Hillsdale College, Michigan. He also has graduate credits in Physiology from the American University, Washington D.C. and graduate credits in Business and Marketing from George Washington University, Washington D.C.

Ron is President and Senior Strategic Facilitator of **RT Planning Strategies**, Toronto with satellite offices in Los Angeles, Fort Lauderdale, Rome and Beijing.



RON TABACHNICK

THE WORLD'S FOREMOST STRATEGIC FACILITATOR.

"For things to change, First I must change".