

Goal Setting, Planning & Decision Making

Part One
Goal Setting

By Setting Goals You Can:

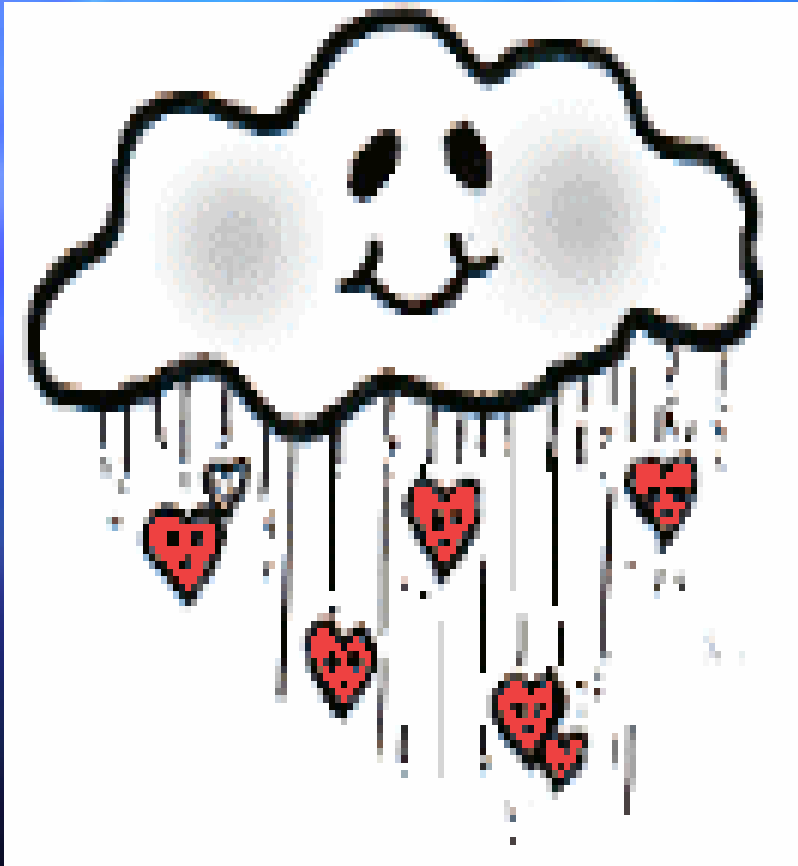


- Achieve more
- Improve performance
- Increase your motivation to achieve
- Improve Self-confidence
- Avoid bad attitudes

Advantages of Goal Setting

- You suffer less from stress and anxiety
- Concentrate better
- Show more self confidence
- Perform better
- Are happier and more satisfied

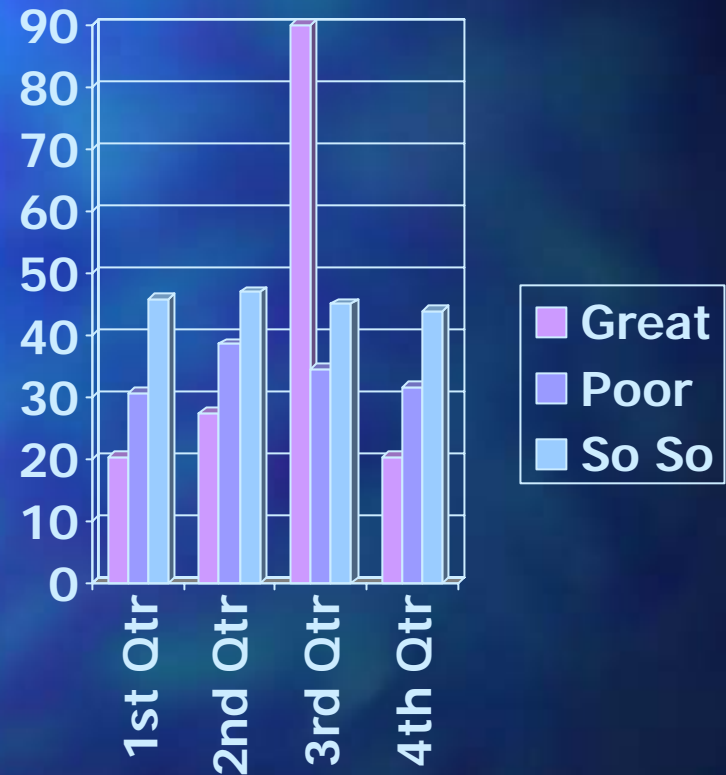
Goal Setting Increases Self Confidence



- By setting goals
- By measuring results
- YOU achieve an understanding of what you can do
- It is the basis for greater achievement

Attitude is Everything

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Stay the Course

- Once you have established your plan, do not quit
- Daily accomplish to do lists, continually revise
- Most people do them the first of each morning or last of each evening

Set Goals Effectively

- Make a positive statement i.e. Execute this job well
- Be precise
- Set priorities
- Write Goals Down
- Keep operational goals small and achievable

Set Performance Goals

- Do not make the mistake of creating outcome goals
- Rather create performance goals in which you have control over your input

Goals Need to be Measurable

- If you approximately meet your measurable goal - *keep it as is*
- If you do not seem to be in the ballpark you need to analyze why not & then consider discarding it, or breaking it down

Reasons People Set Unrealistic Goals

- Other people (they may have a plan for your life...but you have the responsibility for your life)
- Insufficient Information
- Always expecting your best performance
- Lack of personal respect

Setting Goals TOO LOW

- Fear of failure - ironically this is an issue for the intellectually gifted as they are used to 'easy' victory's
- Taking it too easy - if you are not willing to stretch yourself you will not achieve much in life

Setting Goals at the Right Level

- You should set goals that are slightly out of your grasp ... but not so far they are out of your reach
- Personal factors such as tiredness, need for rest, other commitments need to be taken into account

Thinking a Goal Through

- What skills do I need
- What information & knowledge do I need
- What help do I need
- What resources do I need
- What can block progress
- Am I making any assumptions
- Is there a better way to do things

I achieved my goal, now what

- Take time out after you achieve a goal to smell the roses
- Reward yourself in a way that doesn't damage your goal: don't binge eat after losing ten pounds



Failure to Achieve a Goal



- You may not have tried hard enough
- Your goal was unrealistic
- Your technique, skills **or** knowledge were faulty and need improvement

Summary of Goal Setting

- Goal setting is important to:
 - Decide what is important for you to achieve in life
 - Separating the wheat from the chaff
 - Motivating yourself for achievement
 - Building your self confidence based on carefully selected and measurable goals

Summary of Goal Setting

- You can set goals effectively by:
 - Phrasing them positively
 - Defining them precisely
 - Prioritizing multiple goals
 - Writing them down
 - Keeping them manageable, not too hard, not too easy
 - Setting performance goals, not outcome goals

Goal setting, Planning, and Decision Making

Part Two
Planning

Why Should You plan?

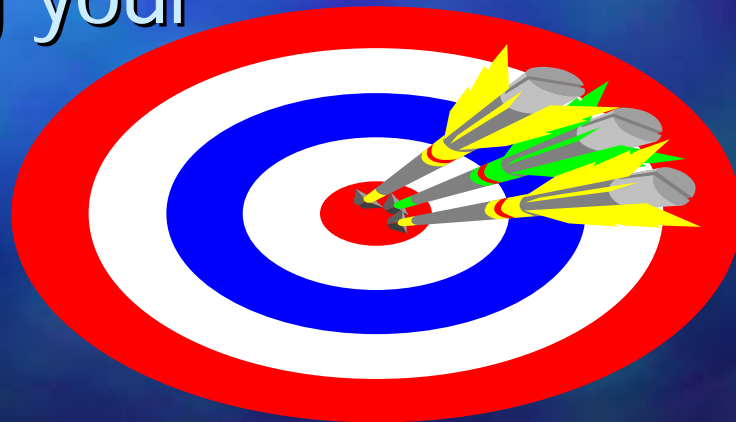
- Planning is risk management for:
 - Life & health
 - Status, career or employment
 - Problems of a lack of resources
 - Wasting limited resources, e.g. \$, time, or power
 - Self esteem if you fail

The Planning Process

- Planning is an up front investment in success
 - Avoid wasting effort - Be Efficient
 - Take into account all factors, then address the critical ones
 - Be aware of all the changes that will be made
 - Gather the resources that are needed

The Formal Planning Process

- Take stock of your current situation
- Identify precisely what is to be achieved
- **Detail precisely and cost the** who, what, when, where, how and why of achieving your

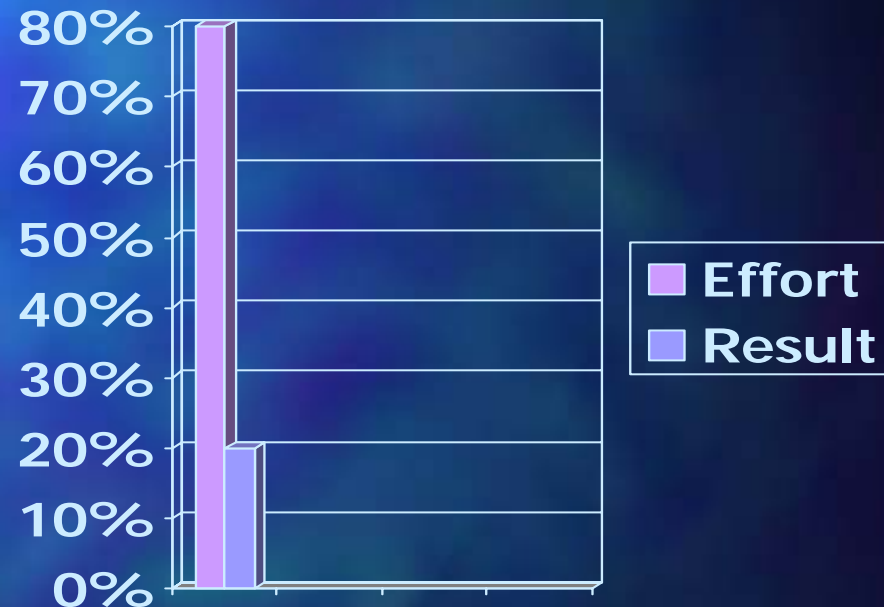


The Formal Planning Process

- Assess the impact of your plan on your organization & the people in it, plus the outside world
- Evaluate whether the effort, costs and implications of your plan are worth achievement.
 - If there are more than two known negatives consider dropping the project

Pareto Principle

- In a non-planning environment it is typical that 80% of unfocused effort produces 20% of the results
- Sometimes the last 20% is not worth the effort



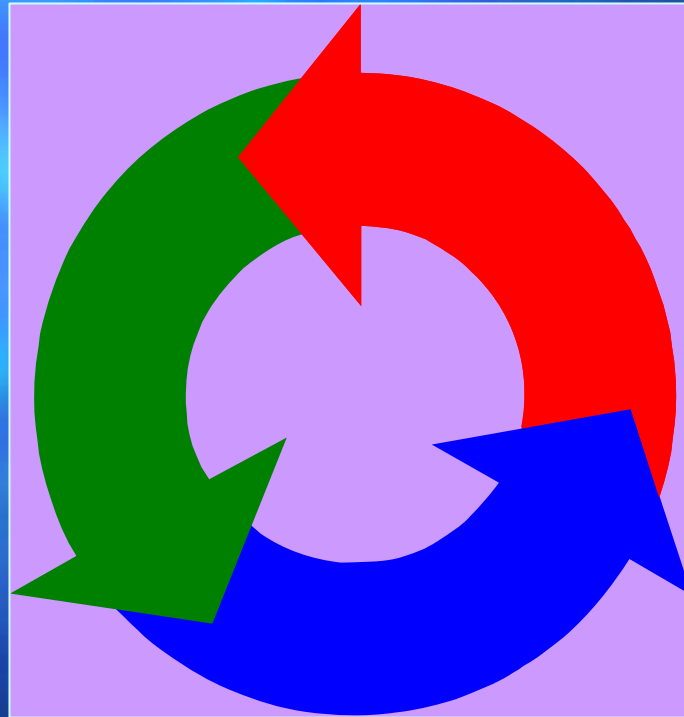
Why do People Avoid Planning?

- Organizational Problems:
 - Poor Reward Structure
 - Fire-fighting
 - The 'get stuck' in culture
 - Opposition to time and expense of planning

Individual Avoidance Planning

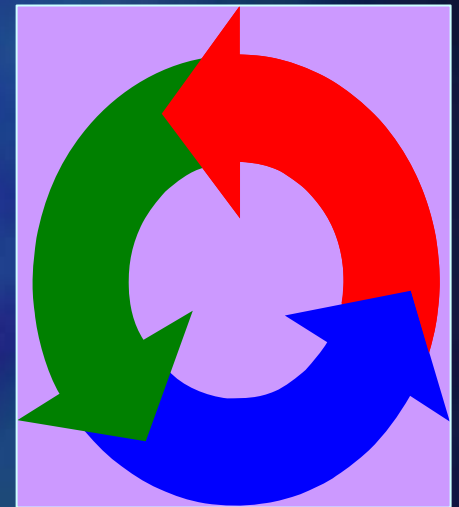
- Individual Avoidance of planning
 - Laziness
 - Lack of commitment or resistance to change
 - Fear of failure
 - Experience
 - Poor experience in planning

The Planning Cycle



The Planning Cycle

- Analysis of current position
- Identify aim
- Explore options
- Detailed planning
- Plan implementation
- Closure of plan
- Feedback



How to Spot What Needs to Done

- Planning may be done routinely - what a concept?
- It may be carried out due to new ideas
- Due to poor performance
- Pressure from your customers - in the military customers may include other agencies, your boss, or clients

How to Generate New Ideas

- Take a look at what irritates you
- Examine what seems laborious and tedious
- THEN FIX THEM

SWOT Analysis

- Strengths
- Weaknesses
- Opportunities
- Threats

Identifying the Aim of Your Plan

- Identify your aim in a simple sentence.
- If you have difficulty deciding ask:
 - What do I want the future to be?
 - What benefits do I want to give my customers?
 - What returns do I seek?
 - What values do my organization and I believe in?

Vision & Mission Statements

- The vision statement is typically the highest level plan for the organization
 - It expresses the benefit to clients or else the organization's ultimate aim
- The mission statement
 - It is an operations statement defining how the vision will be achieved.

Exploring Options

- Logical Thinking - See Page 15-18 of handout.
- Brainstorming
 - Group
 - Individual
- Research

Selecting the Best Option

- Once you have examined your options, it is time to select one.
- Sometimes there is time to evaluate them all, if so then you a decision tree
 - See Page 19 for sample

Planning Scenario

- Break into groups
- Use the Personal Planning Document
- Discuss these issues for 20 minutes
- Then Spend ten minutes to explore a group car buying decision
- Present your results

Detailed Planning

- This is the process of arriving at the most efficient and most effective way of achieving the aim you have defined
- It is the process of who will do **what**, **when**, **where**, **how** and **why** and at what cost.



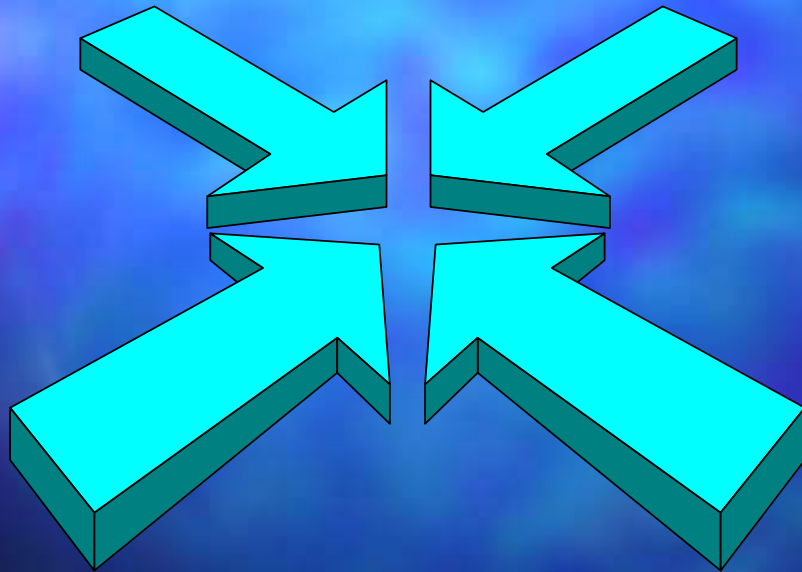
Identifying Key Activities

- The first stage in the planning is to identify the key actions that need to be done
- For each key action plan out how it will be done
 - This will allow you to calculate the costs of that action

Prioritizing Activities

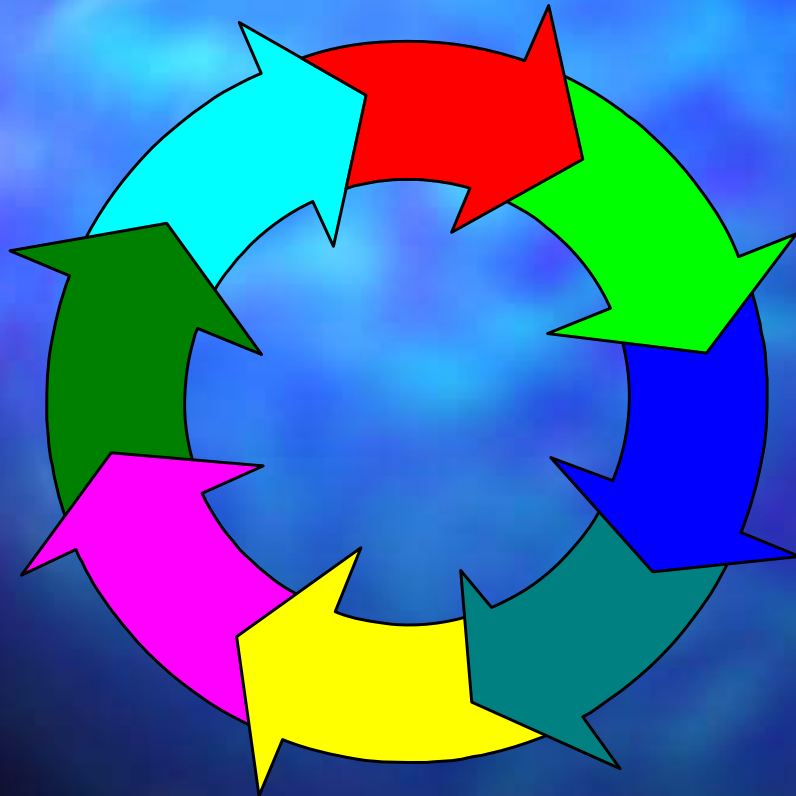
- Once you have identified key activities, prioritize actions so you avoid getting bogged down on lower priority items
- Where actions depend on other actions before they can happen then use critical path analysis as these are sequential events

Critical Path Analysis



- Basic Concept is there are sequential and parallel events that can occur
- Parallel events do not depend on others and timing is less crucial

Critical Path Analysis Methodology



- See Pages 20 - 25
- GANTT & PERT Charts are Used
- Manpower allocation can be figured and costs defined

The Elements of a Good Plan

- It will have a clear statement of the status quo
- Have a clear aim
- Reflect the resources available
- Detail tasks to be carried out, whose responsibility they are, their priorities, & deadlines

Elements of a Good Plan

- Explain control mechanisms that will alert the manager to difficulties
- Plan for contingencies, so that rapid effective response may be made to crises, perhaps at a time of low ebb or confused following a set back.

Making Effective Plans

- Involve people affected by the plan to gain their support
- Explain why the plan is to be carried out
- Ensure the required resources are available and remain available
- Build in milestones & review progress. This helps keep a sense of momentum.

Elements of an Effective Plan

- Use KISS (Keep it Simple and Straightforward)
- Keep the plan flexible
- Consider traditional arrangements, how will you keep things going while you implement the plan.

Evaluation of the Plan and Its Impact

- After you have developed the plan details, make sure it will work.
- In addition, realize there are unintended results both negative and positive that may emerge.
- Do a cost benefit analysis, some plans are best never implemented.

Plan Evaluation Techniques

- Cost Benefit Analysis - add up costs, do they total more or less than benefits and by what margin?
- PMI - Plus Minus (See pages 28-29)
- Force Field Analysis (See pages 29-31)
- Cash flow forecasts and break even analysis
- Risk analysis and contingency planning

Implementing Change

- Upon completion of a workable & needed plan it is time to implement it
- Resources need to be directed toward implementation
- The process needs to be monitored to ensure corrections can be applied as necessary

Plan Execution Tools

- Year Planners
- Diary
- Statistics and Analytical Tools
- Specialized software

The Four Steps to Managing Change

- Ensure that everyone understands why the change is needed, frequently people embrace change as they are dissatisfied with status quo
- Show people how things will be better
- Ensure that people understand the plan
- “Burn the Ships” ensure there is no way to return to the old way

Resistance to Change

- Self Interest
- Fear of the unknown
- Conscientious objection or differing perceptions
- Suspicion
- Conservatism

Closing Projects

- Once the plan is achieved - close the project
- Evaluate the plan concentrating on:
 - The quality & consistency of delivery achieved
 - The work achieved
 - The length of time it took to achieve
 - Real costs versus perceived costs

Success



- Close the project with a ceremony
- This allows everyone a chance to feel part of the project's success
- The success of the plan may be lost in the details of adjustment otherwise

Decision making

Part Three

To Invest or Not Scenario

- Review Scenario (five minutes)
- Meet for ten minutes in group
- Identify Groups' Choice regarding investment
- Pick spokesperson
- Report as asked.

Planning for Decision Making

- Decision making without planning is frequently not pretty:
 - Crisis Management
 - Putting Out Fires
 - Seat of the Pants Management

Decision Levels

- Strategic
- Tactical
- Operational

Strategic

- These operate at the highest level
- They contain general direction about long-term goals, philosophy and values
- These are the least structured and potentially the most imaginative decisions

Tactical

- Tactical decisions support
- The time line is medium
- For example, if your strategic decision is to be a forest ranger, tactically you will read books about it, attend school to get required credentials to do so

Operational

- These support tactical decisions
- Their impact is immediate
- The consequence of a poor operational decision is minimal (outside of combat) but can cause harm
- Operational decisions can be preprogrammed.

Planning Techniques

- T- Chart: provides a graphical and orderly representation of various points involved in a decision
- Buriden's Ass: used to choose between two equally attractive opportunities arise
- Measured Criteria: With this approach weighted criteria are assigned

Sample Marketing Plan

- See pages 42 & 43
- Small Business Administration Has Sample Plans & Classes for those wanting to start their own business