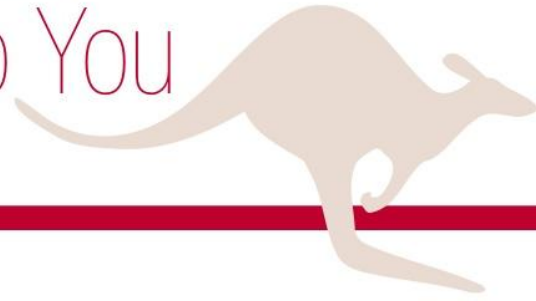


From **ROO** to You



October, 2010

From Planning to Performance

Well, it is that time of year again. Time to budget, time to dust off last year's annual plan, and time to wonder....what the heck happened?

How many "mission critical" or "#1 Priority" projects stalled out, never got off the ground or were simply forgotten about? Were they the right priorities? What about that class you intended to take or the book you meant to read? Despite our best of intentions, keeping our goals top of mind is challenging. Figuring out how to accomplish them can be even more challenging.

We hope that this month's issue helps you, and your organization, identify the "critical few" priorities to focus on and as importantly, to complete successfully. As always, we welcome your input, insights and stories.

For You: Setting SMART goals – and achieving them

This time of year you may be summarizing your performance or results as part of an incentive program or performance appraisal. You may have set New Year's resolutions or intended to pursue a new career path. Did you succeed? I hope so. Whether your goals are personal, professional or relationship oriented, your probability of success will increase exponentially if you follow a few simple guidelines:

1) Set **SMART** Goals

- Specific.....well defined
- Measurable.....obvious whether goal was achieved (#, \$, %, date)
- Achievable.....with a reasonable amount of effort, can be achieved
- Relevant.....within your ability to impact / change and
.....important to the organization or your development
- Time based..... Major milestones established with a clear END date

2) **FOCUS** on the critical few.

- Pick 1 or 2 goals to focus on during any given period. Which will bring you the most

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satisfaction or have the biggest impact?

- Trying to work on too many projects or improvement areas at a time is overwhelming and dilutes our ability to excel in any one area.
- Review your progress regularly – schedule time to do this on your calendar

3) **TELL** someone.

- All of a sudden a someday aspiration becomes a real goal. Once you share your goal with someone you are more committed.
- A few months ago a colleague shared that he has wanted to write a book for quite some time. He shared this with a group that meets monthly and we follow up to support him and hold him accountable.

For Your Organization: Putting People and Execution back into your Projects

Before committing to priorities and budgets for 2011, dedicate the time to set your organization and project teams up for success. This requires realism, prioritization, adequate resourcing and most importantly, leadership commitment.

To determine organizational priorities:

- Differentiate between must do, important and pet projects.
- Use a simple Difficulty / Impact analysis to prioritize corporate initiatives
- Decide what you are not going to do.
 - Organizations typically assign too many initiatives and projects with a finite amount of resources. Focus on the critical few projects and figure out if there are things you, or your staff, can stop doing.
 - If no one reads that report, stop creating it.

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- If your pet project consumes 5% of your time but prevents you from participating in a key project, stop working on it or do it during off hours.
- If that is the way “we’ve always done it”, ask why. Update, change, or eliminate the process if it no longer makes sense.
- Figure out how good is “good enough”.
 - Define the outcomes and deliverables for different levels of performance
 - Some projects require “A” level performance and need to be resourced that way.
 - If you do not have the financial or human resources to deliver an A performance, define what “B” or “C” level outcomes would look like. Sometimes lesser outcomes are fine and you can work toward “A level”.
 - If B or C level outcomes are not “good enough”, the organization needs to adjust for resources for the project to be successful.

To set up your project team for success:

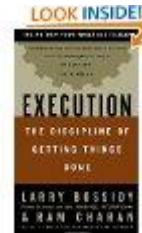
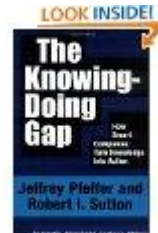
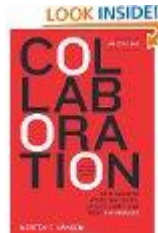
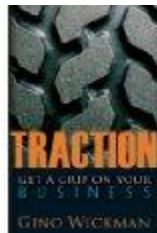
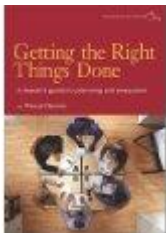
- Assign an Executive Sponsor. He / she needs to help define project scope, remove obstacles and monitor progress. This person needs to have the authority to make things “happen” at higher levels in the organization and across functions.
- Clearly define project scope: what is in scope and most importantly, what is outside the scope of the project. If the Executive Sponsor / Leadership Team cannot define the scope or intended outcomes at a high level, stop the project and figure it out. Lather, rinse, repeat until the scope is clearly defined. You are unlikely to succeed if the Leadership Team doesn’t know what success looks like.
- Assign a Project Leader. This is basically the Project Manager who herds the cats and keeps the project moving
- Define the “Core Team” necessary for success and the “consulting members” whose expertise you only need on occasion. Don’t tie people up in meetings unnecessarily.

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- Set expectations and ground rules for team member participation and contribution
- Standardize agendas and minutes. Assign someone (other than the project leader) to be responsible for taking and distributing minutes. Limit action item review to 5-10 minutes. Focus on the working part of the meeting.
- Celebrate milestones and successes. Don't save up all your pizza parties and company presentations for "the big one". Acknowledge the small victories along the way to keep the project top of mind and your team members engaged. Encourage project updates during company meetings.
- Project closure. Include a lessons learned, a short team member evaluation to share with the employee and her manager, and a timeline to ensure your project is sustained.

There is a wealth of reading material regarding strategic planning, yet only a few really good, practical books on execution. Before committing to too many projects, too poorly resourced, consider reading a title or two:



For additional strategies to help you identify and execute organizational priorities, consider our "Project Management Basics" training and strategic planning and facilitation services.