

Chapter 3 – Planning

“If you fail to plan, you are planning to fail!”

That says it all, doesn't it? We all know that planning is a vital part of any successful activity, but we often get so involved with day-to-day pressures that we don't take the time necessary to create a plan that will ensure success.

Planning can be defined as any kind of process for creating or implementing an idea or a project. Part of the problem is the sheer scope of the concept of planning. It includes goal setting, brainstorming, strategic planning, project planning, critical path analysis, personal time management, and so much more. We will discuss the different levels of planning and then provide useful strategies to help you with the planning process.

Strategic Planning

Strategic planning generally refers to a process used to accomplish BIG objectives and long-term goals. It is, appropriately enough, a military term typically used to describe planning for large operations or long time frames. An MWR “Five Year Plan” is a strategic plan.

For example, DoDI 1015.10, Military MWR Programs, charges each Service in DoD to the following Strategic Plan.

MWR program plans shall accommodate locally-assessed needs while maintaining both the readiness capability to support wartime missions and the operating capability to meet quality, fiscal, health, and safety standards both in the short and long-term.

Tactical Planning

Tactical planning is a term used to indicate a process for accomplishing somewhat smaller, shorter-term, or narrowly-defined objectives.

In business terms, planning the opening of a new fast food restaurant is probably a tactical plan for the installation...although it might be considered a strategic plan for the manager of the new restaurant. In other words, perspective is a part of the equation. The annual financial plan is a tactical plan for the MWR operation.

Project Planning

Project planning is the process used to accomplish specifically-defined activities or undertakings.

In MWR/Services activities, there are many relatively small but important projects involved in each operation. For example, outdoor recreation might conduct an annual “Summer Bash.” Or the unit may all work together on the annual “4th of July Festival.”

The Planning Process

The planning process involves taking an “as is” model of an organization, situation or project and turning it into a desired “to be” model. In examining the “as is” model, you must understand the vision and mission of your organization and your leadership. Each of the

Services and most installations will have a Vision Statement and Mission Statement. Many MWR units will as well. As part of that team, your vision, mission, and goals must be in line. You also have to be aware of the commander's priorities, as the installation commander controls use of or access to all resources: funds, real estate, personnel, etc. If you can show your plan supports the installations' priorities, you have a better chance of obtaining approval.

Once you understand the "as-is" you then develop the "to-be."

Planning is often required in order to devise a solution to a specific problem. An effective problem-solving process normally involves five specific steps below.

Step 1 -Define the Problem

This sounds easy, doesn't it? After all, if you didn't know what the problem was, you wouldn't be dealing with a plan for solving it. But beware...if you define the problem in different ways, you will probably get different solutions.

Here's an example once used in the US Army Club Course.

Students were asked to come up with a goal for their club. One student answered, "...to create a western-themed dining room." The instructor pointed out that this was an easy goal to achieve. Simply find a vendor who specializes in décor, and pay whatever it takes to get the chosen theme. "But wait!" said the student. "I don't think we can afford the cost of a professional designer." "Okay," continued the instructor, "then all you need to do is invite the Spouses' Club in to redecorate your dining room." "But the Spouses' Club doesn't understand what is required to make the dining room profitable!" complained the student. "Oh! So your goal includes making a profit?"

The discussion continued for the better part of a one-hour class, but you get the idea. The original idea of creating a theme for the dining room was actually a strategy for achieving deeper goals.

The student had not defined the problem. One way to get at the root of a problem is to continue asking "why?" until you reach the bedrock reason for your project. NOW you can state the problem with confidence.

For example, suppose your goal is to link the Officers Club and the Recreation Drama Group together for a quarterly Dinner Theatre. *Why?*

- Because it should produce more business for both groups. *Why do you want more business?*
- Because it will improve profits. *Why do you want/need to improve profits?*

Now we're really getting down to the essence of what motivates MWR/Services managers. There are more "why's" still to come, but even at this level, it becomes obvious that creating a quarterly Dinner Theatre on the installation is really a *strategy* for achieving some other goals. There may even be other strategies which would work better...depending on how you finally define the goal.

Step 2 -Research Relevant Information

A common mistake in trying to solve management problems is to take action before getting all the relevant information. (Of course, you probably can't actually get *all* of the relevant information, but at least assure yourself that you've covered the basics.) What does your boss think? What does your staff think? What do your customers think? If you don't know the answers to these three questions, you are not ready to continue.

Step 3 -Devise a Range of Possible Solutions to the Problem

If you only see one solution, you probably haven't spent enough time on research. (It has been said that if you think like a hammer, every problem will look like a nail!) On the other hand, if you see dozens of solutions, try to enumerate solutions that are significantly different from each other. Don't get too hung up on the availability of resources at this stage. It may be that, if the best solution is dramatically better than the others, you will be able to devise ways to obtain additional resources.

Step 4 – Consider the Advantages and Disadvantages of Each Solution

A basic list can be very helpful. Remember that each advantage has within it the seeds of a disadvantage, and vice-versa. For example, "Costs too much" (on the Disadvantage side) is probably balanced by "Provides best facilities" (on the Advantage side). "Can be done quickly," an advantage, might be balanced by, "Doesn't provide for customer input," a decided disadvantage. Once you have completed this step, put it aside and go back to it the next day. Try to get at least three additional points under both sides of each solution. Most people find that this "digging deeper" often produces extremely useful information.

Step 5 – Select the "Best" Solution

If you have performed the first four steps with dedicated integrity, the answer is probably already in front of you. But if you look at your work and don't see an obvious solution, there are several things you can do.

First, review your goals. Make sure that you truly understand why you're going through this process. Consider the benefits that you will derive once your solution is implemented. Compare the advantages and disadvantages in relation to those desired outcomes...you may find that there is a weighted importance to some of the points that makes them more useful in determining the best solution.

Get more help. Not everyone has the same perspective, so find someone whose opinion you trust, and put the whole problem in front of them. Sometimes, a new perspective will cut through the clouds and lead you to a solution.

If you are still wavering, consider the *risk* involved in implementing each solution. To some extent, that should have been included in the advantages and disadvantages, but now give it a new focus. Perhaps the downside of one solution not succeeding is substantially greater than the others, or perhaps the upside is so strong that one solution now seems to be the best.

Brainstorming

Step 3 above is to "Devise a range of possible solutions." A useful managerial tool in doing this is brainstorming. The basic concept is simple: a group of people unleash their creativity to

produce lots of ideas, leading to innovative solutions to problems.

Four cardinal rules for brainstorming:

1. No criticism is permitted.

Many meetings break down as individuals clash over different ideas. In a brainstorming session, all ideas are accepted, recorded, and considered. The leader must be someone who commands respect by everyone, since it is the leader who will enforce this rule. No exceptions!

2. Changing and combining ideas is encouraged.

A free flow of information is essential to the brainstorming process, as ideas often build upon one another. When participants understand that criticism will not be tolerated, an atmosphere of creativity is more likely. The leader should help hesitant participants understand the benefits of active, enthusiastic participation.

3. Quantity of ideas is actively sought.

At some point, participants will feel that they have come up with as many ideas as possible. That's when the creative process is most important! The leader must push people to expand their horizons, to think of possible ideas that are not obvious, and to become actively creative. The most valuable sessions are usually those which produce the most ideas.

4. Unusual ideas are encouraged.

A wild and apparently unworkable idea expressed by one participant may spark a workable idea in someone else, or perhaps a way to make it work, or a workable modification. A good brainstorming leader creates a playful atmosphere in which wild and crazy ideas are accepted by everyone in a spirit of fun.

Remember that brainstorming is not a method of solving problems per se, but rather a technique for stimulating ideas that will lead to successful solutions. Ultimately, it is the manager who is responsible for solving problems and implementing solutions. This responsibility cannot be delegated, not even to a blue-ribbon panel of experts.

SWOT Analysis

So the brainstorming is done and you have a planned solution to a problem. One proven way to evaluate potential plans is to perform a SWOT Analysis. SWOT is an acronym for Strengths, Weaknesses, Opportunities, and Threats. This will provide a better understanding of the environmental factors that will impact the project or organization as the plan is implemented.

Strengths are those aspects to your project or organization that give it an advantage in the marketplace. For example, perhaps you have a strong brand, or experienced employees.

Weaknesses are those things which might be a competitive disadvantage. Perhaps the facilities are old and run down, or you are not competitive on price.

Opportunities are those things that you can take advantage of to improve your position. For example, perhaps a new military organization is coming to your installation.

Threats are those factors that may cause problems. For example, a weak economy or planned

troop reductions.

A SWOT analysis will assist you in understanding the “as is” situation. And the more complete your understanding of the “as-is” situation, the better prepared you are for designing a change.

Goal Setting

Once a plan is agreed upon by the appropriate levels in your chain of command, you will be required to set goals to accomplish the plan. The complexity of the plan will determine the number of organizations with whom these goals must be coordinated. If a new ball field is being built, tremendous coordination will be required from the financial planners, engineers, installation safety, etc. If a new menu is being developed, coordination is on a much smaller degree, probably limited to your kitchen staff, key customers, and vendors. Below are some basics for any level of goal-setting.

Goal setting is the process of deciding where you want to wind up as a result of some particular strategy. You might set goals for your personal life, such as saving for a fantastic vacation, or goals for your business, such as showing a 10% net income at the end of the accounting period.

Many studies have demonstrated that those who have written goals achieve more success than those who just muddle through. If you doubt this, pick up one of the myriad books on the subject and start reading.

Walt Whitman, the famous American writer, is credited with saying, “If you don’t know where you are going, any road will take you there.” But if you want to be in control of the journey, here are the seven most important principles of goal setting.

To be effective, your goals must:

- Be challenging
- Be realistic
- Be specific
- Have a time frame for completion
- Be measurable
- Be in writing
- Be constantly available

Be Challenging

There is no point to a trivial goal. For example, you might say that your goal is to increase participation by one person per year. For most MWR/Services activities, that would be a trivial goal. Make the goal something exciting! But don’t forget the next principle:

Be Realistic

Perhaps you would like to have the biggest pizza delivery service in the military. Perhaps you are in a small installation, where most of the personnel live far away and commute to work each day. It may not be realistic to have a huge pizza delivery operation, but you can certainly serve pizza.

Be Specific

Lots of people wish they had “a better job,” or “more free time,” or “more money.” But these are too vague to be goals. A goal might be, “I want to be the manager of the bowling center,” or, “I want to get off work no later than 6 p.m. during the week, and work only one weekend per month.” If it isn’t specific, it isn’t really a goal.

Have a Time Frame for Completion

“I want to be the manager of the bowling center” is specific, but it will never happen unless you decide when it’s going to happen. Add this to your statement, “...by September 1 of next year.” What happens if you miss the deadline? Simply set a new one. After all, it is your goal. But there’s something about having a deadline that makes all of us more likely to get something done.

Be Measurable

“I want my MWR/Services activity to gross one million this year,” is not only specific, it’s also measurable. Any accountant should be able to tell you precisely when you’ve achieved the goal (or how much more you need to bring in before you’re there).

A goal like, “I want to be physically fit,” sounds good, but is difficult to measure. Perhaps we could say, “I will lose 20 pounds and be able to do 40 push-ups by the end of the year.” The scale and your ability to count will tell you when you have achieved your goal.

Be In Writing

If your goals aren’t in writing, they aren’t really goals...they’re just wishes. Until we write them down, using the other principles, we are unlikely to experience the changes that we wish for.

Be Constantly Available

Now that the goals are in writing, you must constantly refer to them and track your progress. Talk about them at staff meetings; ask for updates from key players...unless you make reaching these goals a priority, no one else will!

Summary of Chapter 3

Planning is any kind of process for creating or implementing an idea or project. Planning for MWR/Services managers can be divided into three types: (1) strategic (2) tactical (3) project

Goal setting is an important strategy, and involves seven principles. Goals must: (1) be challenging, (2) be realistic, (3) be specific, 4) have a time frame for completion, (5) be measurable, (6) be in writing, and (7) be constantly available.

A process for problem-solving involves five steps: (1) define the problem, (2) research relevant information, (3) devise a range of possible solutions, (4) consider the advantages and disadvantages of each solution, and (5) select the “best” solution.

SWOT Analysis involves analyzing the Strengths, Weaknesses, Opportunities, and Threats that surround a project or organization.

Brainstorming is a useful technique for stimulating input or creative ideas.

