



Effective Planning:

The Key to Living an “Intentional Life”

By: Steve Brainerd, Founder & President of Durham Group, Inc.

If you have been to your share of time management seminars and programs, you have probably heard this comment: “Most of us spend more time planning a two-week vacation than we do planning our lives and careers”. As silly as this sounds, it may be more accurate than we think.

In 1979, Harvard did a survey of the graduating class. They asked the graduates if they had a specific plan now that they had graduated. Here is how the responses sorted out:

- 77%** Said they were so glad to be graduates, the only plan they had was to have a good summer
- 20%** Had an action plan, but hadn’t written it down
- 3%** Had a specific, detailed strategic plan regarding their career

Ten years later, these folks were interviewed again. Here are some surprising statistics:

- The 20% who had a plan were making an average of **three times** those who did not have a plan.
- Those who had a written plan were making an average of **ten times** those who did not have a plan.

That’s good news. It wasn’t intelligence or talent that was the critical factor – it was their ability to write down their goals and consistently chip away at them. Which category would you like to be in?

I thought so. So how do we plan effectively? Let’s break it down:

1. Create a Vision

What do you want? Most likely, this step was easy for the top 3% since they probably knew what they wanted. In their mind, there was a future state they wanted to move towards. They could visualize it, feel it, and get excited just thinking of being in the whole picture. (see vision)

2. List Tasks and Activities

I know a contractor who consistently does well. His name is John and he has a reputation of doing excellent work, being on time, and operating within budget. When taking on a client, the first thing he would do is ask thorough questions to determine exactly what the customer wanted, and what was important to them. Once he clarified and affirmed their precise expectations, he would list every single task and activity that needed to be done to finish on time, within budget, with exceptional quality.

3. Categorize

It is easy to get out of balance in life, isn’t it? Following human nature, we tend to focus more on those activities that we enjoy the most and are easiest for us. Here is a rule of thumb to help simplify: Most of our activities can be broken down into 4-8 categories. If less than four, we may be over-simplifying. If over eight, consider consolidating. For example, my builder friend, John, breaks his entire activity list into, carpentry, plumbing, electrical, record-keeping, etc.

If you are not a builder, you probably will have some or all of the following categories, depending on your role and the results for which you are compensated:

New Business Development: In this category, we put those tasks and activities that are directly related to gaining new clients. These can vary, and are usually built on our strengths and time-tested activity that has a good track record in spawning more accounts.

Relationship Management: We have customers, networking partners, centers of influence, and other key people who can help us. We can't do it alone. Success involves the help of other people. We need a specific strategy to keep connections strong.

Product & Service Delivery: The most profitable people I work with are uncompromising in their commitment to quality, being on time, and operating at an efficiency level that permits good value. This involves systems, processes, measurement, and leadership.

Professional Development: Are you getting better? Your competition is. This category can be one of the most neglected in our planning. With all the daily pressures and distractions, it can be tough to take the time out for activity and goals that will sharpen our business acumen and professional edge. Activities in this category frequently fall in to the Q2 quadrant. (Important, but not urgent) By the time this category becomes urgent, it may be too late.

Administrative/Record-Keeping: This one is not my favorite. As an executive coach, I would rather be in the moment, partnering with my clients to solve problems. Filing, tracking, and documenting just don't excite me. Here is what does excite me: Keeping up with these activities supports the categories I do love. If I keep up with the paperwork side of the business, I am more professional, and can manage my time with better focus.

Mentoring: This one exists primarily for those of you who have direct reports. Not only are you responsible for your own results, you must account for those who report to you. A big part of growing our business is growing our people. Our action plan needs to include this component.

4. Prioritize

Now that we have the categories, we can get to work on tactics. In each category, we can put specific action steps. These action steps must first be prioritized. Here are two key questions we can ask when prioritizing:

- How much will I benefit by doing this activity? (The benefit question)
- How much will I suffer if I don't? (The suffering question)

5. Put in Sequence

Now that we have categorized and prioritized, we can put the steps in sequence. This sets us up for effective delegation, execution, and achievement of desired results.

Most Importantly: Set time aside to plan for the next day. Usually the best time is the end of the day, after you are wrapping things up, and cleaning up your desk. What a minute...you say your desk isn't clean, and you don't have time to plan? Here is a maxim that was first observed by Crawford Greenwalt, former CEO of the DuPont Corporation: "For every hour spent in quality planning, you save an average of two hours of execution" If you are skeptical of this statement, talk to the most successful person you know, and listen to what they have to say about it.

GOOD PLANNING!

DURHAM
group, inc.

7N710 Cloverfield Circle
Saint Charles, IL 60175

P: 630.377.6027
www.durhamcoach.com