



## **Backwards Planning**

### ***6 Simple Rules for Scheduling Next Year***

*"Russian Submarine Captains don't (go to the bathroom) without a plan."*  
-Fred Thompson, in *The Hunt for Red October*

It is the time of year when organizations, companies, associations and individuals begin planning for the next year. Recently, while conducting a Time Management training seminar, I was amazed to find out how many people – managers yet, have no clue how to plan their schedule or their goals. I am surprised anything gets done in business with so many leaders who can't make proper plans. There is an old adage that goes: "He who fails to plan, plans to fail." Looking back at my own career in business, most managers I worked for planned their goals and schedules to fail. They set out with a misguided agenda, so of course they spent the next year in damage control. Then when the next planning time came, they were left wondering what went wrong.

There's another saying that goes: "The more you do of what you're doing, the more you'll get of what you've got." Tired of getting the same results year and year out? It is time to start planning for success. It is time to try something different. Here's 6 Steps to guide you in planning ahead for success in the year ahead. Use them in your next meeting and see how they orient your entire organization's thinking.

1. **RESULTS** – Try planning backwards - Start with the results in mind. Most mid-level managers plan around their schedule in an effort to "fill the calendar." If your group's goal is to stay active and keep everyone busy this is a great idea. But if your goal is to accomplish something like, oh I don't know, let's say your organization's mission or turn a profit, this is the dumbest way to start out. Really, what are you in business to do? Move the sand pile left then move it back right the next quarter?

Smart planners begin with the results they want to achieve. They ruthlessly eliminate everything that doesn't support this goal. They never hesitate to say, "No, that's not what we are about." Great leaders stay focused on the main thing they and never deter from it. What do you want to see occur next year? Where

do you want to be? Set that as your planning goal and let everything fall in to place around it. Guard this and don't let any other activity or program get in the way.

2. **ACTIVITIES** – Next plan the activities it will take to accomplish your goal(s). Don't schedule them yet. Just sit down and determine what it will take to get to the destination you have set. Some activities may be impossible to pull off, but this will give you a good idea of what you need to be doing and how you need to distribute resources to get things done. Planning activities will help you determine the Big Three questions that need to be answered in planning guidelines: (A) What do you think you are doing? (B) What ought you to be doing? (C) What are you actually doing? Examining all three perspectives will give you valuable insight into your job and time problems.

Activities that don't meet these criteria or don't support the mission of your company, corporation or mission should be eliminated, no matter how sacred they are. How many exercises do you do for no other reason than, we've always done them? Read *Sacred Cows Make Great Burgers*. Yes, it is risky to ask "Why?" but you've got to take a few risks to venture into new territory. Have some fun. Go around and ask people how certain historical practices originated and why they continue to schedule them every year. You'll be surprised at how many people are clueless, but continue to perform them like mindless sheep.

3. **PRIORITIES** – The next step will happen almost automatically. You and your staff will begin to re-evaluate your priorities and find out what you need to be about in the year ahead. You'll be surprised to find consensus when you have eliminated useless activities that don't accomplish your mission or goals. Determining your goals and activities will help you establish clear priorities for the time period you are planning. It will help you enforce the "If it doesn't support or goals, we're not doing it" rule.

Use the Pareto Principle to establish priorities: "Eighty percent of our activities produce 20 percent of the results, while only 20 percent of our activities produce 80 percent of the results." Vilfredo Pareto was a 19<sup>th</sup> Century Italian economist who established a rule for economics that works in almost every realm of planning. It is simple: List your top ten priorities in order, then circle the top two. Concentrate planning on those two and the other eight will take care of themselves. More organizations waste time on useless trivial activities that produce almost no results. The wisdom of life consists of eliminating the non-essentials.

4. **TIME ESTIMATES** – How long will it take? How much time will each activity require to get you closer to your annual goals? The key to successful planning is to plan both work and time. Start to determine what will take big blocks of time, how many people will be required to get it done and where will the resources be needed to accomplish each task. Next look at the smaller blocks of time and find

out how they can be batched together to eliminate waste in funding and time. Where are the wasted time slots? How can they be reduced or wiped away completely?

Determine what time of the year is the peak performance time to get each task accomplished. Where are the slow periods annually that you can get more “behind the scenes” work done? When is your “showtime,” when visible tasks are best accomplished? Remember these are only estimates but they will give you a good idea as to when you need to be concentrating on the right tasks at the right time.

5. SCHEDULING - Now look at your actual calendar. Things that are scheduled tend to happen on time. Things that are not scheduled may never happen. As I said earlier, most managers tend to schedule first in an effort to fill the calendar and eliminate gaps. Knowing what you are about, why you are about it, and how long it will take will be the greatest ally you have in putting things on in ink.

Use this guideline for scheduling: Flexibility in time: Start early on major efforts, Big blocks come first; smaller jobs/activities come second; and group items that are similar in nature. Scheduling along these lines will do more to eliminate wasted time in your calendar. It will allow for the time estimates to become realities and your people to know what they are doing, why they are doing it and how it fits into your overall mission/goals.

6. FLEXIBILITY – Allow time for error and the uncertainty. This can only be done if you have set out to allow the proper amount of time for big projects. No one can predict the future (although we seem to have an abundance of philosophers, pundits and fanatics who attempt to do it every day). A well-known television economist spent the first two months of his new program telling everyone not to buy home improvement company stocks (Lowe’s, Home Depot, etc.) then was forced to retract every prediction when they soared following the devastating hurricanes in the Gulf Coast areas. One good rule: Don’t take advice from anyone who isn’t personally invested in the suggestions they are giving. You probably have example in your own life of people who said to do one thing only to change when things weren’t as certain as they assured you. Don’t get stuck paying the bill for their mistakes.

Planning flexibility allows you to adjust your schedule as needed. It allows you to drop back and re-evaluate your intentions and redistribute resources and personnel in key areas as are required. Be flexible about your schedule, but not your results or goals. Times change and although you can’t predict the future, the great leaders are able to see through the present times and prepare for both good and bad events. Those with the best outlook on life are always expecting the best, but prepared for the worst, just in case. To deny that problems will arise is foolishness.

In summary, our ability to control our time is directly related to our attitude toward controlling our environment. Now you are in control of your schedule. You determine what to do and when to do it based on a simple rule: What results do we want? Henry Ford said, "Whether you think you can or you can't, you are right."

A year from today, evaluate the tasks you accomplished. How did your employees, support staff come together to meet your goals? How long did it take for everyone to get in step with the master plan and find ways to cut wasted time and reallocate resources? How prepared were you for unforeseen events in the market and society? How much more can you accomplish next year? Try "Backwards Planning" and see how everything fits better into place.

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