Highlights	Inside
AECL's Corporate Strategy Strategy	The PFR Process
AECL's 6 point checklist	Tools
	Planning For Results & Change Management

Strategy & Planning for Results (PFR)
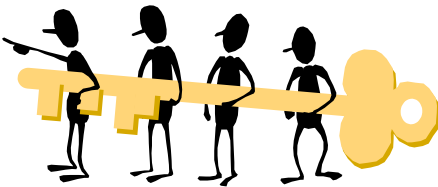
How does a leader and team ensure work goals are focused, linked to Corporate Strategy, challenging and realistic?

Effective planning and goal achievement is an essential aspect of leadership and team performance. The PFR Process provides a means of 1) linking planning to company strategy, and 2) involving the members of the team who know and do the work. Involving the team builds commitment and ensures deadlines are challenging and realistic.

What is Planning For Results?

It's a future-focused planning process used to plan for completion of business goals involving the people responsible for doing the work. The Planning For Results Workshop reviews the process with a work related example.

The six point check list shows the key components that contribute to an organization's effectiveness.

6-Point Checklist

Strategy - is a company's formula for success. It is a statement of how the company plans to adapt to the forces that shape it. Components of a strategy include:
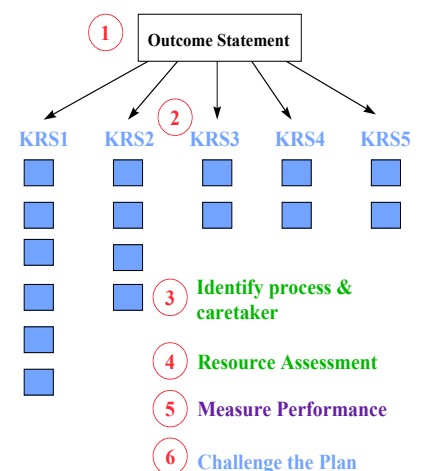
Purpose
Products & services provided
Target Market(s)
Value to the Customer
Sources of competitive advantage

In the workplace, often we find ourselves working on a project without knowing where we fit in the bigger picture. The PFR process may be used for any size project, and clearly focuses on achieving the end result.

The PFR Process

PLANNING FOR RESULTS

1. Outcome Statement
2. KRS1 KRS2 KRS3 KRS4 KRS5
3. Identify process & caretaker
4. Resource Assessment
5. Measure Performance
6. Challenge the Plan

Implement & Monitor

O4-9

1. Outcome Statement

This is a description of what work life looks like when planned results have been achieved, or a description of what a project looks like once it is completed. It defines a time frame, describes what is happening and what team members and customers are thinking e.g.,

It is March 31, 1997
Where are we?
What are we doing?
What does it feel like?

2. Key Result Statements

These describe the significant pieces of work that must be completed to achieve the outcome. The process of identifying these includes brainstorming for factors that will affect the outcome, developing clear statements of the impact of these factors, force-ranking and prioritizing these, (by using the worksheet below)

PRIORITIZING GRID

TALLY: As____ Bs____ Cs____ Ds____ Es____ Fs____ Gs____ Hs____ Is____
Js____ Ks____ Ls____ Ms____ Ns____ Os____ Ps____ Qs____ Rs____
Ss____ Ts____

O4-23

then wordsmithing these to create Key Result Statements that are:
Major
Meaningful
Measurable.

3. Process and Caretaker

The steps involved in getting the work done, and the individual or team who will monitor the timing and effectiveness of the process are identified. The caretaker's role to watch for conflicts and oversee interactions between their process and other processes linked to it.

4. Resources

must be assessed for each Key Result Statement to ensure that the required materials, facilities and skills are available for the work. The worksheet below helps you identify required resources (must have) and resources that would make the work more efficient or effective (nice to have).

Resource Assessment Worksheet

Resource Needs	Must Have	Cost ($)	Nice to Have	Cost ($)
Materials				
Equipment				
Tools				
Facilities				
Technical Skills				
People Skills				
Process Skills				
Time				

O4 - 15

People and money are not considered resources. It is the skill that the person brings that is the resource. Money is a means by which resources are purchased. Leaders need to translate skills and other resources into people and money to ensure that the budget required to make the outcome happen is available. This can be facilitated by highlighting the necessary tasks, how long they will take, who is required to perform them, and the critical timing of these tasks on the following worksheet.

Critical Path Worksheet

Task	Who	Net Time	Start Date	Complete Date

O4-16

A critical path is a detailed description of tasks requiring completion. There is usually a critical path for each Key Result Area in the process.

5. Performance Measures

Establishing milestones and their success criteria
Score-boarding milestones that are applicable and appropriate to communicate to the entire team.

6. Challenge the Plan

This begins after Key Result Statements are complete and continues through completion of implementation:
check with team and customers for improvements
watch the corporate plan for revisions that affect the unit
monitor trends that can result in changes to the plan.

PFR & Change Management

Planning for Results is a tool you can use to help you manage change. Using PFR involves the team from the planning stage onward so their ideas are what creates the plan.

For more information, contact Organization Development and Training at your site.

Agenda

- Strategy

- Planning for Results Exercise

- The Planning for Results Process

O2-2

Objectives

- understand how a strategy is built

- identify the link between strategic direction and unit planning activities

- identify the connection between teams, planning and achieving key results

- apply the Planning for Results process

O2-3

Introduction   The strategy section of this unit is designed to introduce you to strategy; what it is, what it involves and how organizations establish Strategic Direction.

In order to achieve any organizational strategy, it must be cascaded through the organization. Plans to complete each goal that rolls out of the strategy must be established, ensuring that the work will be completed on time and in full.

Planning for Results is a future-focused planning process that involves the people responsible for doing the work. This helps build commitment from the team and realistic time lines for the work

Content
- Introduction
- Strategy
- Planning for Results
  - Outcome Statement
  - Key Result Statements
  - Process and Caretaker
  - Resource Assessment
  - Critical Paths
  - Measuring Performance
  - Challenging the Plan
- Summary
- Example

Strategy

6-Point Checklist
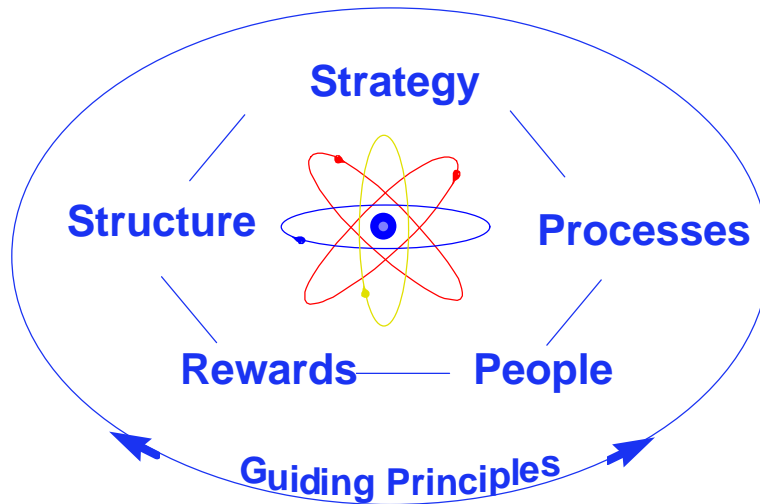
O2-4

When planning strategy, an organization shpould also account for the other five elements in the 6-point checklist.

STRATEGY is the chosen formula for success based on interpretation of the environment. A strategy deals with the overall business direction of an organization and is decided upon by the executive. It is a statement of how the company plans to adapt to the forces that shape it. It is a guide for the organization to work from. If the forces that shape or influence the organization change, then the organization must react quickly and revise the strategy appropriately, in order to ensure ongoing success.

The components of a strategy include:
> Purpose of the Organization
> Analysis of internal and external influences
> Products and Services Provided
> Target Market(s)
> Value to the Customer
> Sources of Competitive Advantage
> Strengths, Weaknesses, Opportunities and Threats

A Strategic Direction is established based on data that is gathered today and the assumptions we make about the future of the trends we observe. Conscious choices around the direction an organization

will take are made. As the trends change, it is important for the organization to adapt to them in order to succeed.

The strategic direction is the responsibility of the executive; it is up to line management to take the strategic goals that are established and translate them into reality with and through their employees.

Once the top priorities have been established, the organization focusses on planning the accomplishment of these goals. The strategy must be cascaded down throughout all levels of the organization, in a way that ensures that all groups are focussed on achieving their important piece of the strategic goals. Planning for Results is a tool designed to help do this.

GUIDING PRINCIPLES: In developing and carrying out strategy, the people of any organization should follow well understood guiding principles established by the executive, which are the values and rules of the organization. These encompass how people are expected to behave, how work will be done, and should be consistent across the company. These should be modeled by the executive and all leaders.

STRUCTURE: The organization's structure must fit the strategy. For example, if your strategy is an international one, you may want to have offices in a variety of countries around the world. You may need to change structure to help achieve the company's goals. For example, a company made up of very distinct, separate departments that don't associate with one another may decide that it needs flexible work teams with experts from each department, and move to a project-based structure.

When using the Planning For Results process, you will have to account for groups and relationships within the organizational structure in determining how the work you are planning will get done.

PROCESSES: Your leadership role requires you to interpret and guide your unit's contribution to the overall strategy through the work it produces. All work is achieved through work processes. There are also processes for relating to people.

Planning for Results is a process for planning how work will be done, as well as how to institute any necessary changes.

PEOPLE: Strategy must account for the people of the organization - their talents, abilities, experience. People are the most important resource for any organization. It is important to ensure you have the right people in the right places at the right times.

The Planning for Results process utilizes the expertise of the team of people responsible for getting the work done. Bringing everyone into the planning process builds commitment and ensures deadlines are challenging yet realistic. Although this demands more planning time up front, it ensures improved communication and productivity in the end.

REWARDS are important to consider when setting strategy. They will help to create incentive for people to follow the strategy and be loyal to the organization.

Likewise, in Planning For Results, you should set up meaningful rewards for the people on the project - ways in which they can recignize progress and accomplishments, and feel proud about their contributions.

Planning for Results

In the workplace, all too often we find ourselves working on a project without knowing where we fit in a bigger picture. The Planning for Results Process may be used for any size project. It includes all team members from the start, promotes commitment and clearly focuses on achieving the end result.

The process is a tool that:
1. builds a vision for the team,
2. plans the team's work and enables alignment with the Strategic Corporate Direction,
3. establishes plans that can be achieved with milestones to check progress, and
4. enables each team member to participate in the planning process detailing their involvement and time.

PLANNING FOR RESULTS

(1) **Outcome Statement**

(2) **KRS1**   **KRS2**   **KRS3**   **KRS4**   **KRS5**

(3)

(4) **Resource Assessment**

(5) **Measure Performance**

(6) **Challenge the Plan**

(7) **Implement & Monitor**
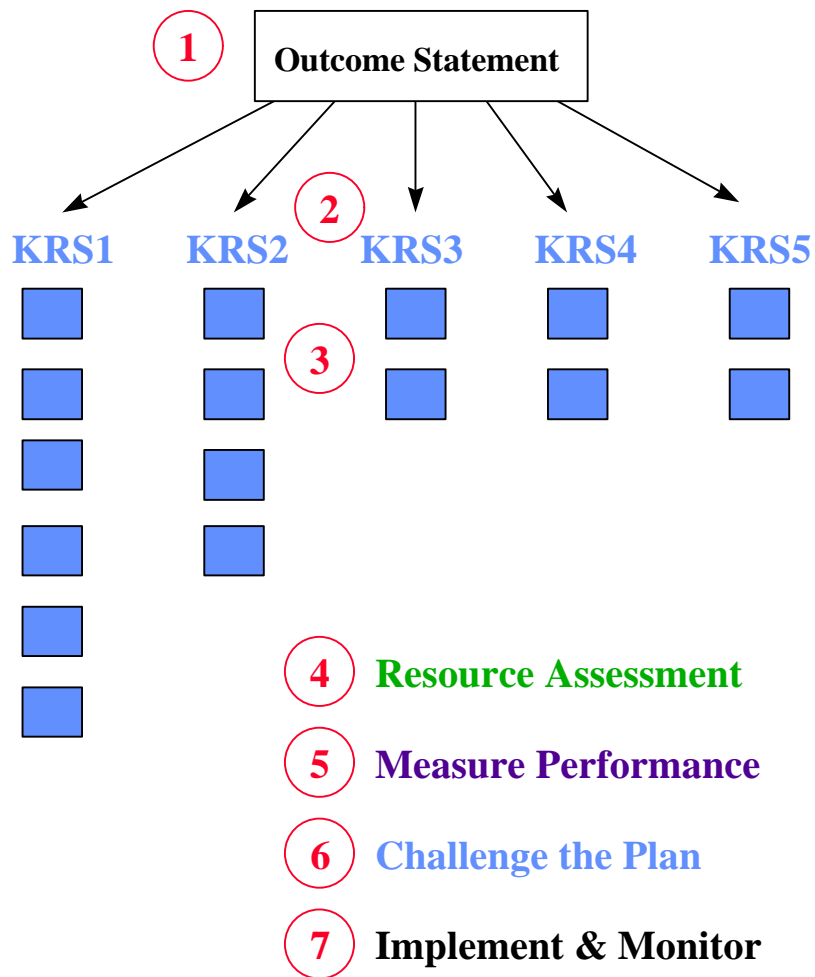
O4 -9

The process offers a framework for ensuring that the team members' capabilities, ideas and energies are focused and aligned with the overall strategic direction - working to sound and achievable expectations.

Outcome Statement

An outcome statement is a description of what work life looks like when planned results have been achieved or a description of what a project looks like once it is completed. It defines a timeframe and describes what is happening and what team members and customers are thinking.

The outcome statement evolves from Corporate Strategic Direction which is broken down into strategic goals for each unit. The goal itself can be crafted into an outcome statement or, if the goal is long term, it can be cut off at a specific milestone for the purposes of using this planning process to scope out a detailed plan.

Steps for building an Outcome Statement with a team:

1. Scope out the limitations of the team: what the team is here to do and what it is NOT here to do.

2. Check the environment. Discuss external and internal factors that will shape business over the coming year or will shape the project. Establish whether each item is a threat/weakness or a strength/opportunity.   This step is optional.

3. Determine the future time period; 5 years, 2 years, 1 year etc.

4. Focus on being there at a specific date.

5. Brainstorm ideas from the group. Record all ideas. Keep the team focused on the outcome. It is easy for people to get caught up in the 'how-to' or the things that will prevent success. Explain to the team that these will be dealt with later in the planning process.

6. Mold the ideas into a written paragraph:
   a) Work to consesus if there are opposing ideas;
   b) Build agreement to the final outcome; and
   c) Ensure the outcome builds a clear image of the future.

Allow the time required for people to become comfortable with the outcome. Once all adjustments have been made, ensure that all participants are willing to work towards making it happen. COMMITMENT HERE WILL DETERMINE THE SUCCESS OF THE PLAN!

**Key Result
Statements**

Key Result Statements identify the significant pieces of work that
 must be completed to achieve the outcome.

It is important to ensure that the team has the 'right' statements. The
steps for building Key Result Statements involve a series of
prioritizing exercises that enable the team to decipher and mold the
outcome into tangible pieces of work that everyone understands and
agrees to. The steps include:

1. Brainstorm factor words.
2. Create factor statements by putting sentences around factor
    words.
3. Prioritize factor statements based on importance to the outcome.
4. Prioritize extremely important factor statements using the
    Prioritizing Grid based on 'what do we need to work on first'.
5. Mold Factor Statements into MAJOR, MEANINGFUL,
    MEASUREABLE, 1 or 2 sentence Key Result Statements.

The following is a detailed description of how to evolve Key Result
Statements from the Outcome statement with your team:

Factor Words

Ask the team for factors that would have had to be considered and
dealt with in order for this outcome to have occured. A factor is a
noun that may have an adjective to describe it; one or two words.

Record all ideas on the flipchart or onto a computer. Number each
word.

Factor Statements

Assign the factor words equally to individuals or groups of four to six
team members.

Ask groups to write a statement for each factor word that incorporates
the word. The statement should be in the past tense, and cannot
change the word. It must be used 'as is'. The statement must have
been true in order for the outcome to have occured. Remember that
you are in the future and this outcome is reality. 'How' you get there
will be dealt with later.

Document the statements on a flipchart or into a computer,
underlining the original factor word and numbering the statements as

the factor words are numbered. Post the flipcharts around the room or distribute a compiled document. Keep them in numerical order.

Regroup and have everyone read all the factor statements so they are familiar with them and understand their meaning. DO NOT CHANGE ANY OF THE STATEMENTS.

Ask the team to consider this question: If all the statements were true, would you have achieved the perfect outcome? If not, what is missing from the picture? Keep in mind, you cannot deal with all of these factors at the same time, and there will be some overlap. There will also be some priority in terms of relative impact on the outcome.

Force Ranking

Divide a flipchart paper into 3 horizontal rows. Label the top section "Extremely Important", the middle section "Very Important", and the bottom section "Important".

The team then begins to rank the factor statements according to their importance to the outcome. It is their degree of importance relative to each other that you are deciding here. Each factor word and factor statement will be reviewed before the plan is complete, to ensure that nothing has been missed.

In small groups, or with everyone together, rank the factor statements into one of the three categories. Each group should record their rankings on a flipchart. Place the number of the statement in the appropriate section on the flipchart. If similar factor statements exist, put the numbers close together.

Once all numbers are placed, FORCE RANK them so there are equal numbers in each section; start with the top section adjusting to 1/3 of the numbers, then do the middle, finish with the bottom.

If you have used small groups, place the flipcharts close together and amalgamate the lists into one common list.

Prioritizing Grid

Assign a letter to each of the factor statements in the top section of the force ranking.

PRIORITIZING GRID

Prioritizing Parameter	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
A	X																			
B		X																		
C			X																	
D				X																
E					X															
F						X														
G							X													
H								X												
I									X											
J										X										
K											X									
L												X								
M													X							
N														X						
O															X					
P																X				
Q																	X			
R																		X		
S																			X	
T																				X

TALLY: As _____ Bs _____ Cs _____ Ds _____ Es _____ Fs _____ Gs _____ Hs _____ Is _____
Js _____ Ks _____ Ls _____ Ms ___ Ns _____ Os ___ Ps _____ Qs ___ Rs _____
Ss _____ Ts _____

Ask the team to complete the Prioritizing Grid (shown on the previous page).   Explain that you are going to prioritize the factor statements to identify a starting point. The prioritizing criteria is now "What is most important for us to work on first?"

For example: Is A more important for us to spend time on right now than B? If yes, write an A in the spot where A and B intersect. If no, write a B. Continue in this manner until you have completed the grid using all the letters in the top section of our force ranking.

When you have completed your comparison, add up your total for each letter.

To determine overall group priority, tally up the total for each letter for all participants. Example:

> A - 11
> B - 50
> C - 28
> D - 33

Determine the group priority. In case of a tie, flip a coin.

Mold the Statements

Assign one of the top priority factor statements to different individuals, or to groups of 4 - 6, or work with the entire group.

Here the purpose is to take the assigned factor statement, and wordsmith it until it becomes a Key Result Statement that fits the following criteria:

MAJOR - does the statement reflect a significant piece of work?

MEANINGFUL - is the wording clear and agreed upon? Are there any ambiguous words in the statement? i.e. quality, good, manageable.

MEASUREABLE - Will you know when it has happened?

KEY BUSINESS RESULT - If we owned the company, would we pay people to deliver this?

Once the Key Result Statement is complete, review all the other factor statements. Identify any factor statements that are covered in the Key Result Statement. Another approach - before starting to write, there may be two or more factor statements that are clearly

related that you can consciously incorporate together into one Key Result Statement.

Once complete, have the group come together to review all the Key Result Statements, and to challenge each others' statements using the 4 criteria listed above.

Compare the list of factor statements to the Key Result Statements. Identify those factor statements that are, or are not covered under a Key Result Statement. For those that are, ensure that the original intent of the factor word is covered in the relevant Key Result Statement. For those that aren't, build new Key Result Statements for them. Again, check to see if other factors have been covered in this new Key Result Statement.

NOTE: If a group is having difficulty building a Key result statement, it may be because it is more of an overall principle or characteristic. The principles and characteristics can be set aside to build a list of specific Guiding Principles for the unit or project. These statements are usually around things like 'honesty', 'quality' or 'integrity'.

Process and Caretaker

At this point in the process you blend working backward from the future with working forward from today.

Define the process for how the work gets done, or the work process involved in the Key Result Statement if there is one.

Define the transition process to implement anything that is not currently being done.

A simple way to build processes is to hand out index cards and markers, then brainstorm all the activities that need to be done to make the KRS happen. Write activities on the index cards and arrange them in order of occurrence on a bulletin board or wall. Re-arrange and adapt the activities until the group believes all the steps are identified and are in the best order. This is the point where the "yes, buts..." are accounted for. If there are things which must be overcome, ensure there are steps included in the process to overcome them. Once the steps are complete, identify specific timing required to ensure the outcome occurs in the identified time frame.

Managing for Results

The caretaker is an individual or team that monitors the timing and effectiveness of the process. It is their role to watch for conflicts and interaction between their process and other processes.

It usually takes at least an hour to build a process and, for complex processes, it can take several days.

Resource Assessment

Assessing resources ensures that the requirements of materials, facilities and skills are available for each KRS. The worksheet on the next page will help to review the process and identify required resources (must have) and resources that would make the work more efficient of effective (nice to have).

The next step is to review the assessment worksheet and identify what you have now and what you will need to purchase. Identify your budget requirements for the Key Result Statement using this information. The project or business unit budget for the outcome is built by amalgamating the budgets from each KRS.

Note that people and money are not considered resources - it is the skills that the person brings that is the resource. Money is a means by which resources are purchased. Leaders need to translate skills and other resources into people and money to ensure that the budget required to make the outcome happen is available. If it isn't, the outcome needs to be adjusted accordingly.

Resource Assessment Worksheet

Resource Needs	Must Have	Cost ($)	Nice to Have	Cost ($)
Materials				
Equipment				
Tools				
Facilities				
Technical Skills				
People Skills				
Process Skills				
Time				

Critical
Paths

A critical path is a detailed description of tasks requiring completion. There is usually a critical path for each major block in the process.

A critical path includes;
- a description of the task,
- who will be responsible for doing the task,
- how long will it take in total time,
- when can the task start, and
- when does the task need to be completed to stay on schedule.

A worksheet to complete a critical path is on the next page.

Critical Path Worksheet

Task	Who	Net Time	Start Date	Complete Date

Measuring Performance

Measuring performance includes establishing milestones and their success criteria, and scoreboarding milestones that are applicable and appropriate to communicate to the entire team.

To do this, pick critical milestones (landmarks, major targets, indicators) in the critical path that must be accomplished on time and in full to complete the result on time. Then, establish the success criteria for each milestone.

Scoreboarding is simply making the milestone and the success criteria visible to all.

Ideas for ways to scoreboard include:

_____

_____

_____

_____

Challenging the Plan

The plan is dynamic. You need to continually look for new opportunities and discoveries that will contribute to your success and the success of the corporation. The plan is always open for continuous improvement, or for a total rework.

Anyone involved in or affected by the outcome, including customers, team members, supplier or stakeholders can challenge the plan for improvement or efficiency purposes.

The global work environment is in a constant state of flux. As leaders you need to keep your eyes and ears on what is happening and watch for how it may affect AECL's Strategic Direction and, therefore, your own work plans.

Involve the team and the customers in a continuous review process and revise the plan where it makes sense. Reclarify customer expectations as they are affected by global and national trends.

Involve other managers, communicate the plan, share it with others. Look for synergy, conflict and resource availability.

Planning for Results is a fluid process. The team is constantly revolving between the steps. If financial resources are limited, the resource assessment would reveal the limitation. Then, adjustments would have to be made to Key Result Statements, reflecting this. Critical paths would also have to be reviewed. Any changes would be reflected in all steps of the process.

Change & PFR

Planning for Results is a tool you can use to help you manage change. Using Planning for Results involves the team from the planning stage onward, so their ideas are what creates the plan. They build significant ownership of the outcome and are highly committed to making it happen. This helps decrease resistance to change.

The figure below demonstrates the links between the Change Management Process and the Planning for Results Process. Once you have completed the assessment of the change, you can move directly to Planning for Results. A complete assessment will cover any review of the environment you might do during preparations for building an outcome statement. However, it is still useful to cover this information with the team. In a plan for a significant change, be sure to consider people, processes, structures, technology and rewards. These five areas need to be covered in your Key Result Statements when using Planning for Results.

Managing for Results
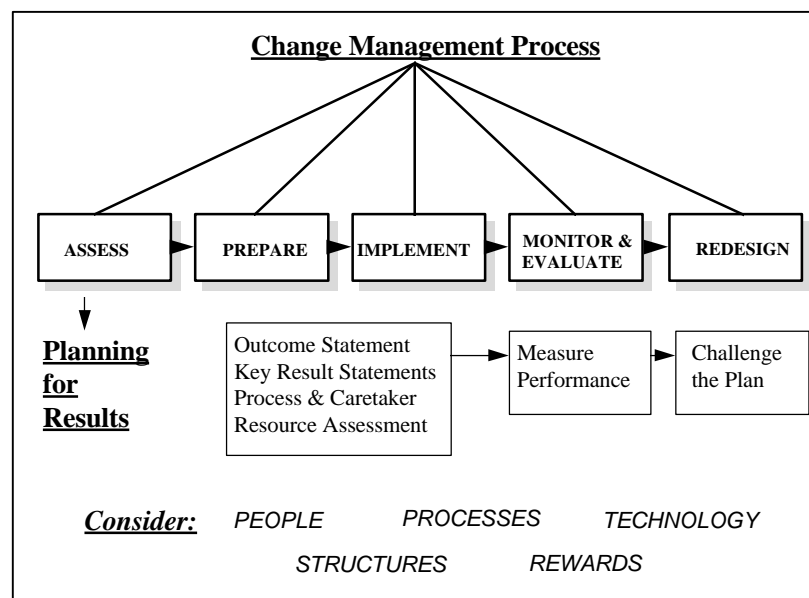
Example

The following example will be used throughout this unit to demonstrate what the Planning for Results process looks like in completed form. This is actual documentation of the output of the process from the N-Ray Unit when it was part of AECL. Although the unit no longer exists, the utilization of the process was a success and their work demonstrates its effectiveness.

Outcome Statement

"It is 1996 March 31. Chalk River N-Ray Services is now the dominant force in the neutron radiographic inspection business and we have over ___% of the world market for turbine blade inspections. Our revenues were over $__ million last year and our gross margin was $__ million. We are recognized as a Major contributor to the commercial success of AECL."

Factor Words

1. speed
2. certification
3. confidence
4. communication
5. commitment
6. accuracy
7. cooperation
8. tagging system
9. aggressiveness
10. training
11. wars
12. part-time
13. loyalty
14. aircraft industry
15. sales force
16. competition
17. partners
18. transportation
19. internal partners
20. money
21. group interaction
22. turbine blades
23. educate (public)
24. customers
25. skill
26. suppliers
27. political value
28. bureaucracy
29. politics
30. success
31. economy
32. NRU
33. development
34. maintenance
35. free trade
36. Washington office

Factor Statements

1. The increase in the <u>speed</u> of our tagging system allowed us to become more competitive.

2. <u>Certification</u> of the N-Ray personnel was important to our success.

Managing for Results

3.   Confidence in our ability allowed us to take on more business.

4.   Good communication skills were very important for everybody involved.

5.   Without a commitment from everybody involved, success would not have been possible.

6.   Accuracy is the key to our success.

7.   The cooperation and understanding of everybody involved made it easy to be successful.

8.   Due to our automated tagging system, we were able to capture tagging business that we did not have in the past.

9.   Due to our aggressiveness in exploring new markets, our gross margin was increased.

10. Training of our staff ensured the high quality our customers expect.

11. Wars of the recent past have depleted the reserve stock of turbine blades.

12. Our part-time staff have become our largest source of cost effective labour.

13. The loyalty of our staff ensured our customer satisfaction.

14. The boom in the aircraft industry after the depression, greatly helped with the production of more turbine blades.

15. Our dedicated sales force helped us obtain over half of the world market.

16. Niche marketing helped us to minimize the effects of actions taken by our competition.

17. Our external partners, such as Emery Worldwide, were instrumental in helping us to provide the services needed by our customers.

18. The transportation network that we developed was crucial in allowing the turnaround required by our customers.

19.   The dedication of our <u>internal partners</u>, including traffic, customers and operations, permitted us to meet the difficult challenges imposed upon us.

20.   The <u>money</u> that we generate has won recognition for us throughout AECL.

21.   <u>Group interaction</u> was the primary route taken towards the process improvements that led to our success.

22.   Our technology for the inspection of <u>turbine blades</u> improved substantially and provided us with our competitive advantage.

23.   Chalk River N-Ray Services has helped AECL to <u>educate</u> the <u>public on</u> the positive side of the nuclear industry.

24.   We are successful because of our great communication with our <u>customers</u>.

25.   Since we had great <u>skill</u> in our personnel, it was much easier for us to grow.

26.   We were able to communicate with our <u>suppliers</u> which helped us with our planning.

27.   The <u>political value</u> of N-Ray has helped AECL.

28.   The decrease in <u>bureaucracy</u> with AECL has helped us to meet our customer needs.

29.   Good <u>politics</u> have helped us meet our goals.

30.   Because of the <u>success</u> in the turbine blades, we have met our goals.

31.   The N-Ray business grew because of the change in the <u>economy</u>.

32.   <u>NRU</u> has been operating regularly with few shutdowns.

33.   The <u>development</u> of our equipment has helped us be competitive with our customers.

34.   The regular <u>maintenance</u> of our facility has saved us time and aggravation.

35. Because of <u>free trade</u>, we were able to get the turbine blades to and from our customers.

36. The <u>Washington office</u> has helped us gain 100% of our business.

Force Ranking   <u>Top 1/3 Results</u>

1 = A	14 = F
5 = B	15 = G
8 = C	17 = H
9 = D	19 = I
13 = E	24 = J

Priority Ranking

The following is a summary of individual ratings:

	G	S	P	K	A	Total
A	5	5	3	2	4	19
B	6	6	9	4	5	30
C	9	4	5	3	2	23
D	8	0	4	8	4	24
E	5	3	9	3	2	22
F	1	9	3	7	11	31
G	8	6	9	8	8	39
H	8	3	1	1	1	14
I	3	1	1	0	1	6
J	7	8	11	7	8	41
K	0	10	3	11	9	33
L	6	11	6	10	10	43

Key Result Statements

Our tagging has allowed a ___ price reduction and a ___% increase in gross margin while substantially increasing the speed of our work.

The group has been operating continuously with very high levels of loyalty and commitment as evident by the low absenteeism rate and the willingness of team members to go above and beyond the normal requirements.

Our partners, both internal and external, have helped us to improve our turnaround time and our throughput capacity.
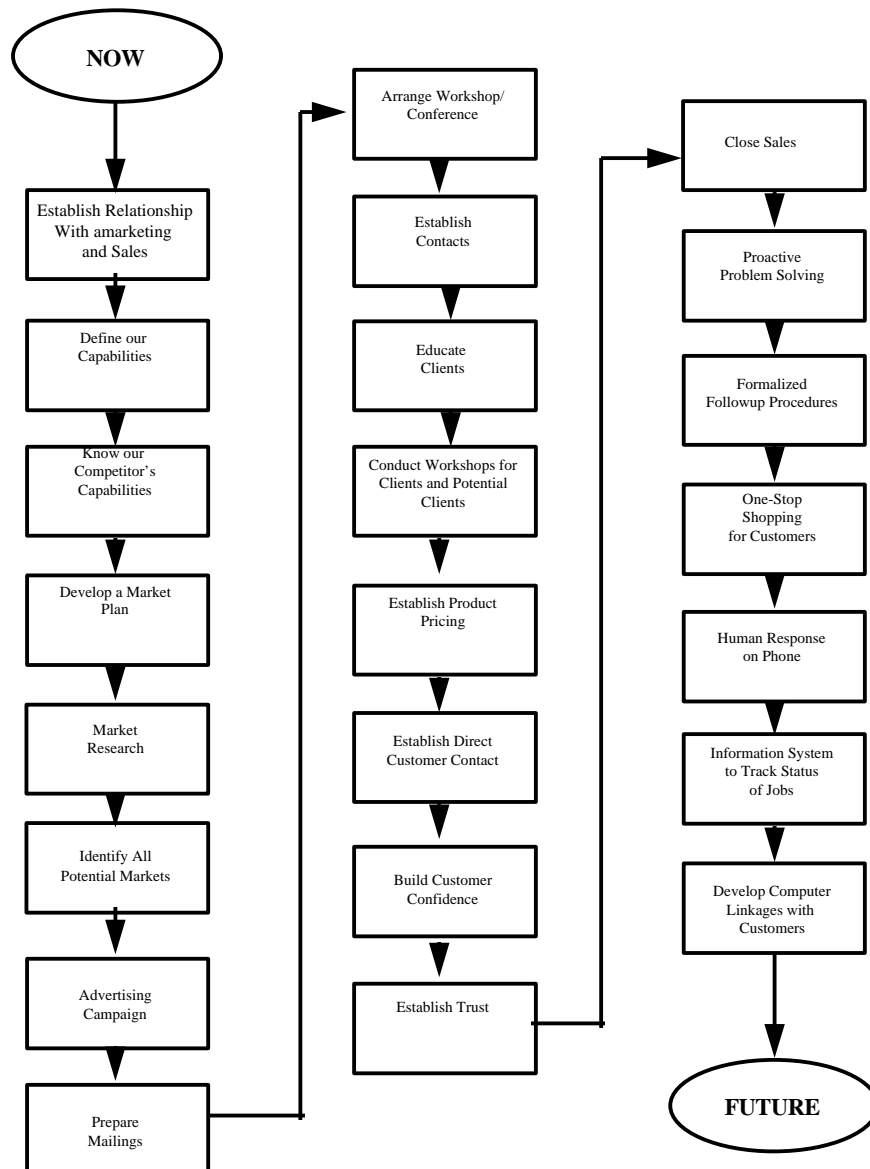
The skills developed through our innovative training program allowed an improvement in overall effectiveness as evident by improved customer confidence and reduced rework costs.

Our dedicated sales force helped us to deliver a higher level of customer service and together with an aggressive communication strategy, we captured ___% of the market at an increased gross margin.

Identify the Process

Process to Achieve (for above Key Result statement)

```
        ( NOW )
           |
           v
+-----------------------+        +-----------------------+        +-----------------------+
| Establish Relationship|        | Arrange Workshop/     |        | Close Sales           |
| With amarketing       |        | Conference            |        |                       |
| and Sales             |        +-----------------------+        +-----------------------+
+-----------------------+                  |                                |
           |                               v                                v
+-----------------------+        +-----------------------+        +-----------------------+
| Define our            |        | Establish             |        | Proactive             |
| Capabilities          |        | Contacts              |        | Problem Solving       |
+-----------------------+        +-----------------------+        +-----------------------+
           |                               |                                |
           v                               v                                v
+-----------------------+        +-----------------------+        +-----------------------+
| Know our              |        | Educate               |        | Formalized            |
| Competitor's          |        | Clients               |        | Followup Procedures   |
| Capabilities          |        +-----------------------+        +-----------------------+
+-----------------------+                  |                                |
           |                               v                                v
+-----------------------+        +-----------------------+        +-----------------------+
| Develop a Market      |        | Conduct Workshops for |        | One-Stop              |
| Plan                  |        | Clients and Potential |        | Shopping              |
+-----------------------+        | Clients               |        | for Customers         |
           |                     +-----------------------+        +-----------------------+
           v                               |                                |
+-----------------------+                  v                                v
| Market                |        +-----------------------+        +-----------------------+
| Research              |        | Establish Product     |        | Human Response        |
+-----------------------+        | Pricing               |        | on Phone              |
           |                     +-----------------------+        +-----------------------+
           v                               |                                |
+-----------------------+                  v                                v
| Identify All          |        +-----------------------+        +-----------------------+
| Potential Markets     |        | Establish Direct      |        | Information System    |
+-----------------------+        | Customer Contact      |        | to Track Status       |
           |                     +-----------------------+        | of Jobs               |
           v                               |                     +-----------------------+
+-----------------------+                  v                                |
| Advertising           |        +-----------------------+                  v
| Campaign              |        | Build Customer        |        +-----------------------+
+-----------------------+        | Confidence            |        | Develop Computer      |
           |                     +-----------------------+        | Linkages with         |
           v                               |                     | Customers             |
+-----------------------+                  v                     +-----------------------+
| Prepare               |        +-----------------------+                  |
| Mailings              |        | Establish Trust       |                  v
+-----------------------+        +-----------------------+            ( FUTURE )
```

Managing for Results

Assess Resources

The following resource assessment was done for the KRS being used as an example. This assessment focusses on the resources required for the workshop/conference steps of the process.

<table>
<tr><th colspan="5">Resource Assessment</th></tr>
<tr><th>Resource Needs</th><th>Must have</th><th>Cost ($)</th><th>Nice to Have</th><th>Cost ($)</th></tr>
<tr><td>materials</td><td>film & developer</td><td>375</td><td></td><td></td></tr>
<tr><td>equipment</td><td>slide projector
overhead
pointers
VCR & TV</td><td>200 to move</td><td></td><td></td></tr>
<tr><td>tools</td><td>light box
developer
cassettes
3 lunches
1 dinner</td><td>1500
1250</td><td>1 dinner</td><td>1250</td></tr>
<tr><td>facilities</td><td>suitable room
NRU for demos</td><td>0
0</td><td></td><td></td></tr>
<tr><td>technical skills</td><td>A/V
NRay expertise</td><td>450
3200
1800
 exp</td><td>keynote speaker</td><td>1500</td></tr>
<tr><td>people skills</td><td>lecturing
facilitation</td><td>600</td><td></td><td></td></tr>
<tr><td>process skills</td><td>organization
coordination</td><td></td><td></td><td></td></tr>
<tr><td>time</td><td></td><td></td><td></td><td></td></tr>
</table>

Identify the Caretaker

A cross-functional caretaker team was formed. The 5 team members represented teams with responsibilities in the process.

Managing for Results

Critical Path   Step 9 - Arrange Workshop and Conference

	Task	Who	How Long	Start Date	Completion Date
1	Identify costs and benefits.	team	2 days	June 12	June 15
2	Reactor shut down schedule.	PS	1 hour	June 12	June 16
3 *	Decision to proceed.	GM	1/4 hr	June 16	June 21
4	Decide on date.	team	1/4 hr	June 16	June 21
5	Book facility.	GM	2 days	June 21	July 15
6	Identify target participants.	team	2 days	June 21	June 25
7	Identify guest lecturers.	GM	14 days	June 21	July 15
8	Prepare agenda.	GM	2 days	June 21	July 15
9 *	Prepare information package.	PS/KD	5 days	July 15	Sept. 7
10	Contact media relations.	GM	1 hour	July 15	Sept 7
11	Arrange hotel accommodation	AF	2 days	July 15	Sept 15
12	Prepare mailing lists.	SS	4 days	July 15	Sept 7
13*	Send invitations	PS	1/2 day	July 15	Sept 7
14	Arrange transportation	PS	3 days	July 15	Aug 15
15	Arrange for security passes	KD	5 days	July 25	Sept 30
16	Send info package.	KD/PS	5 days	July 25	Sept 30
17	Identify conference staff.	team	1/2 day	July 25	Aug 31
18	Identify a key note speaker and obtain commitments	GM	5 days	Aug 15	Sept 15
19	Identify introductory speakers (welcome speech) - obtain commitment.	GM	5 days	Aug 15	Sept 15
20*	Set up facility.	SS	1 day	Sept 25	Oct 7
21	Confirm logistics.	PS	1 day	Sept 15	Sept 25

22	Deliver info package to hotels as required.	KD/PS	1 day	Oct 5	Oct 7
23	Set up registration table.	AF	1 hour	Oct 7	Oct 8
24*	Welcome delegates.	team	2 hrs	Oct 8	Oct 8
25	Conference starts.	team			Oct 8
26	Collect papers presented for reproduction and distribution to participants.	GM	3 days	Oct 8	Oct 11
27*	Conference closes.				Oct 11
28*	Follow up with participants to identify and obtain contracts.	PS	on-going	Oct 15	Jan 15

Milestones   Critical milestones are identified by an asterix (*) on the critical path.

Scoreboard   The following scoreboard was set up to highlight progress towards hosting a successful conference.

Date						
# of clients/potential clients contacted						
# of clients/potential clients registered						
# days to the conference						

Success   Success criteria for the conference included:
Criteria
- conference held as arranged;
- guest lecturers are retained; and
- decision made to hold the conference.

Summary

The Planning for Results Process is unique in two ways:
1. It involves the team.
2. It has a focus on success in the future.

Remember that unit and project plans must link to the overall company strategy. Leaders and their teams watch the environment to determine what is happening external to and within the corporation, then adjust the plan accordingly. No plan is any good unless it achieves the results it was intended to. Without a plan you are working without a map. The secret to success is good planning, commitment to action, the action itself and continual feedback and adjustment to manage the constant changes in the work world today.

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4. 'Firing Up Commitment During Organizational Change', Price Pritchett, 1995.

5. 'Alignment: How It Works and Why it Matters", Training Magazine, April, 1994.

6. 'Strategic Planning', Mike Owens, AECL

7. 'Organizational Effectiveness, A Systems View', Marc Wilson, AECL, 1996.