



## **Planning Guidance:**

### **1. Strategic Direction-**

- Two to five-year roadmap developed and understood

### **2. Environment-**

- Market (technology, regulations, economy)
- Competition (offerings, products, services)
- Customers (What do they want? What do they need?)

### **3. Campaigns-**

- Initiatives supporting the Strategic Direction (marketing, sales, operations, HR, etc.)

### **4. Quarterly / Monthly / Weekly Goals-**

- SMART (Specific actions, dates, metrics)

### **5. Obstacles-**

- Internal and External
- Controllable vs. Uncontrollable

### **6. Resources-**

- Identify current or needed Resources to negate or mitigate obstacles

### **7. Best Practices-**

- Lessons learned from previous attempts

### **8. Action Steps-**

- Who (specific name,) What (specific action,) When (specific date)

### **9. Contingencies-**

- What could happen to derail achievement of goals?
- Quick reaction plan to minimize effects

### **10.Red Team Review-**

- Internal or external review to uncover pitfalls, biases, and test assumptions

### **11.Refine-**

- Refine plan based on Red Team inputs
- Determine timeline with check points and decision points

## **D-E-B-R-I-E-F Guidance:**

### **1. Decide-**

- Commit to Debriefing
- Set date / time / location

### **2. Environment-**

- Safe, Honest, Open
- Respectful truth over artificial harmony
- Debriefing is a Teaching and Learning Opportunity

### **3. Brief Results-**

- Did we achieve? Yes or No?
- What happened?

### **4. Root Cause Analysis-**

- Why it happened? Ask “Why” at least three to five times.
- Possible Root Causes: Communication, Organization, Environment, Goals, Obstacles, Resource Utilization, Timing, Contingencies, etc.

### **5. Identify Best Practices-**

- What should we start, stop, or continue doing?
- Develop actions and activities

### **6. Execute Best Practices-**

- Transfer the Best Practices and take action

### **7. Follow-up-**

- Ensure actions are taken to implement change
- Follow-up on the emotional health of the team

## **Leadership Guidance: Top Five Leadership Principles**

1. Know your teams and look out for their welfare
2. Leaders eat last. Become a true Servant Leader
3. Always explain the “why?” Put context around action
4. Produce more leaders, not more followers
5. Everyone is a leader regardless of rank, title, position