


### Planning Lessons from the Trenches


Yvonne Attard, Oakville Public Library  
Lynne Bentley, Humber College  
Rebecca Jones, Dysart & Jones Associates  
Marjorie Whalen, International Development Research Centre





### Session Objectives

- Share planning experiences & "discoveries" from public, government, academic and corporate experiences
- Examine aspects of planning process
- Balance honesty with diplomacy!

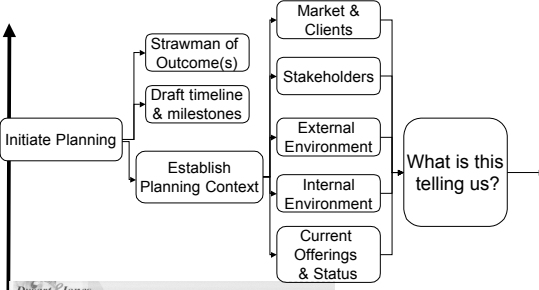

- Rebecca = corporate
- Yvonne = public
- Lynne = academic
- Marjorie = government



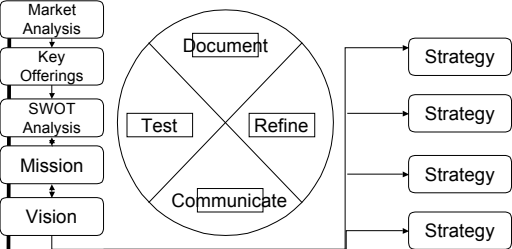

### Basic 3 Phase Planning Cycle

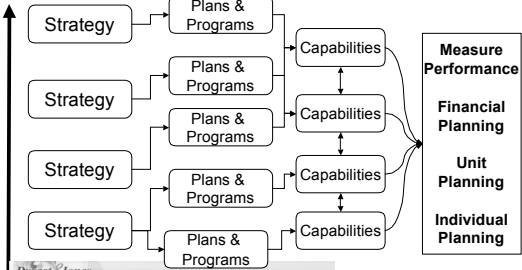

### Planning Process: Clarity from the beginning

### Planning Process: Communication is the Critical Connector

### Planning Process: With the true end in sight...

### The Process Applied in Corporate Settings

- Plan today to implement tomorrow (really – *tomorrow* – as in the *next day*)
- Drives home the importance of:
  - Current client input & conversations
  - Stakeholder connections
  - Balancing the urgent with the critical
- Often the process is completed in a few days

DySart & Jones  
PROACTIVISTS

### Lessons from the Corporate Trenches\*

#### DO:

- Take a pressure cooker view
- Assign planning to "working group"
- Gain senior & team buy-in to the approach, "strawman" & timeline
- Develop, gain approval for decision criteria for selecting strategies or objectives
  - [Example.ppt](#)
- Discuss macro issues in working group
- Work micro issues in breakout or "sub-groups"

#### DON'T:

- Involve too many people in the working group
- Try to do this in your office or without a neutral facilitator
  - "off-site" facilities & ground rules (that are adhered to) are critical
- Keep going without regular check-ins to management & those not directly involved
- Forget to use the decision criteria
- Sweat the small stuff or the fine print

DySart & Jones  
PROACTIVISTS