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The Implementation Planning Method

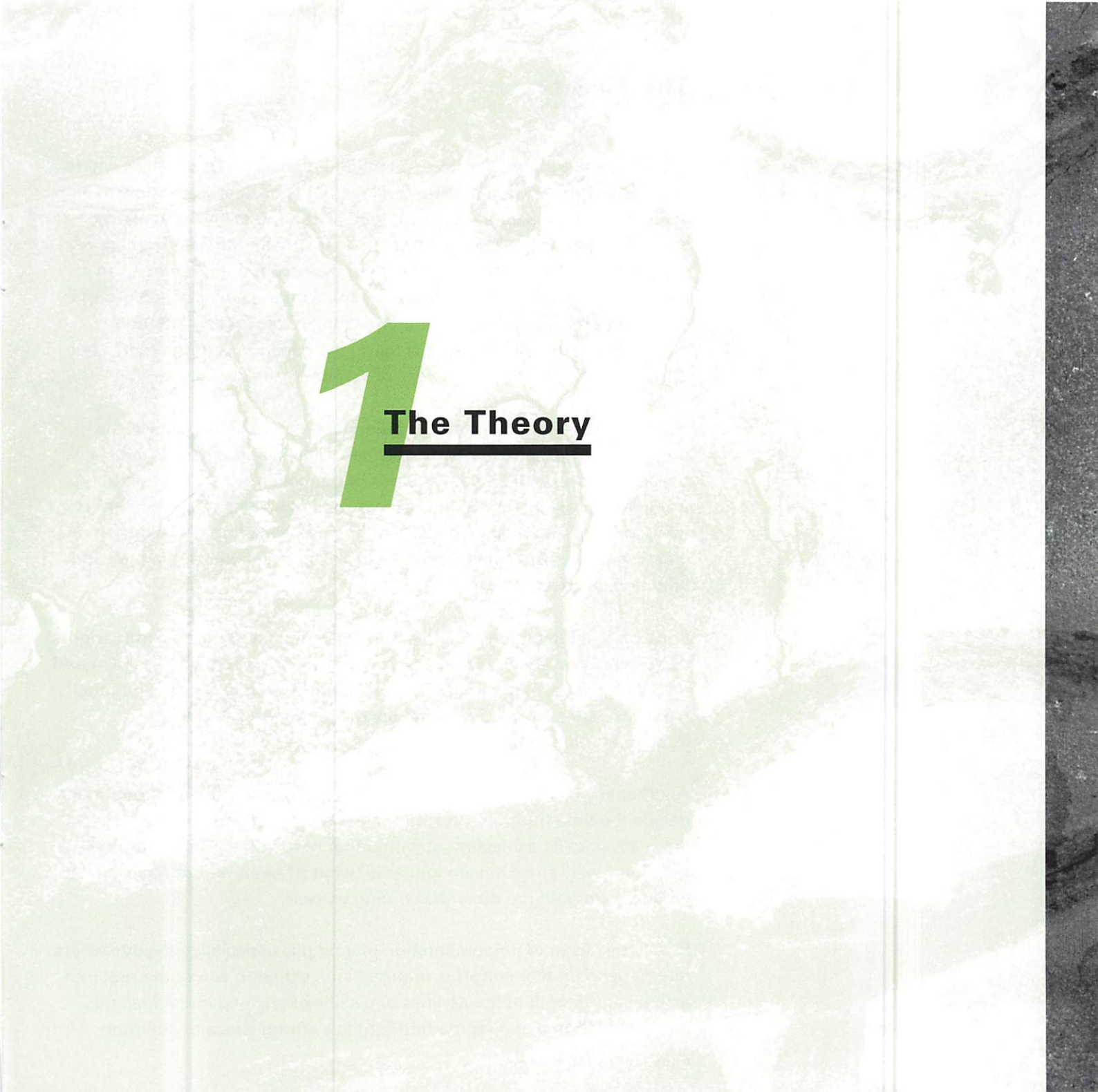
International Facilitator's Companion

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1

The Theory

Section One: The Theory

This is a methodology for implementation planning in a situation where a group has agreed upon a common goal, but is unclear about how to achieve it. It builds upon the group's clarity about its goal and allows them to chart the journey from the present situation to achievement of the goal. It is most effective when done by a group rather than as an individual exercise. It is not a strategy building session where a group is attempting to articulate its future direction. In this implementation planning method the direction is there, the question is not "What?" but "How?"

It is a process that uses both the rational and intuitive insights of the group in order to build an inclusive plan. This inclusiveness is critical because it contributes to the success of the plan by ensuring that the group has considered all contingencies and obstacles that might affect the operation of the plan. In addition, the process often occasions creative and unusual insights which increase the power of the plan and heighten its effectiveness.

Because it is built upon an agreed objective and incorporates the insights of the whole group it creates a strong sense of ownership in the plan and a very high level of commitment. The method itself is a motivating tool which prepares people for a high level of engagement in the implementation of the plan.

Another key element of the plan is that it is time bound. The group must decide the time frame for the implementation plan and commit themselves to its achievement within that time frame. This helps make the plan "real" since it is no longer a "what if" exercise but really saying what we are going to do in the coming weeks.

Finally this form of implementation planning is especially effective where interdependent team effort is required. In a situation where the required action is greater than the abilities and skills of any one individual, this implementation planning method forges a strong sense of common

purpose and team identity where the focus is the task and the common effort to accomplish it. The method can enable a team to work as one and to avoid many of the pitfalls of ordinary group efforts.



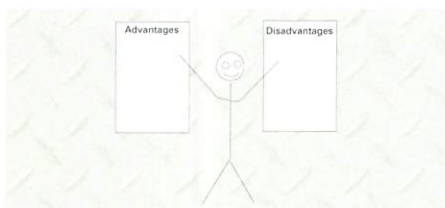
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The Process

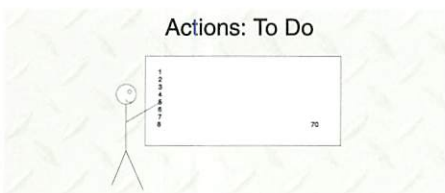
Section Two: The Process



Naming The Victory Standing in the perspective of having already accomplished the plan, “the winners’ circle”, discuss the victory. Brainstorm what things will look like when the plan is accomplished. Ask people to use the present tense. Read through the list to state what the group’s resolve is.



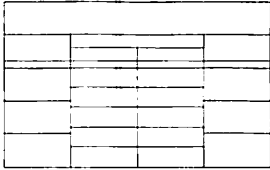
Discerning The Situation Discuss briefly any issues that are unclear. List on the board advantages that the planning group has in reaching their goal. List the points of vulnerability in achieving the goal.



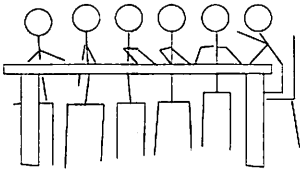
Listing the Do’s In light of the advantages and vulnerabilities, have the group individually list 15-20 things to do to accomplish the goal. These can be to deal with vulnerabilities or to benefit from advantages. Have individuals star their best 5 things. By going around the group put up 50 to 100 actions on the board.



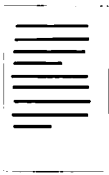
The Intuitive Gestalt Ask one person to read aloud rapidly while the rest individually write down 3 arenas of action. Have a couple of sample lists read while the rest of the group thinks quietly. Put up 4 complete lists of arenas and consense on the final list of 5 - 14 arenas.



The Reflective Chart Build a rational chart that holds all arenas in dynamic relationship. Give motivating names to each arena. Assign teams to the arenas and have them list the four components under each arena. Review the components for each arena as a whole group.



The Corporate Talk-Through Assign a different scribe for each arena talk-through. Select one person to talk through the specifics of how to act out the arena, including its intent, key actions, personnel use, timing, etc. Have the group respond to each talk-through.



The Implementation Plan Write-up Assign groups to write implementation plans for each arena. Each group is centered on its respective scribes. Have the groups decide the time period for each arena. Make assignments of personnel.



Finalize Implementation Plans In a plenary session have each group read their plans including the timing. Make any changes to the plans and adjust timing and personnel use.



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Examples

Implementation Planning

Rational Objective: To create an Implementation Plan for a group.

Existential Aim: To be confident in realizing the team's goal.

Step	Procedure	Notes
Context	<i>"The Polish Faculty for Small and Medium Size Enterprises" is just over 1 year old. We began with a two week version of the ToT course that each of you participated in. One result was a 90 day plan for the National Faculty. There was a meeting in November last year to check the plan and create new plans. That meeting resulted in the six ToT courses in 5 regions with Polish faculty increasingly doing more and more of the course, now about 85%. We now need to plan the next steps. I will use a short term planning technique called Implementation Planning. An Implementation Plan is a set of actions designed to reach a particular practical goal. It has a short term objective. It has a specific clearly defined goal. It has a limited life expectancy, a few weeks to 6 months or so, never longer than a year.</i>	
Movements	1 We want to set up the formal organization of the faculty and expand membership. Naming The Victory 2 We want to stand in the perspective of having already accomplished the plan. This is like imagining standing in the "winners' circle" at a horse race. Individually, brainstorm what things will look like when the organization is formalized. Please use the present tense. 3 Go around the group and ask people to read their items and put them on the board. Read through the list to state what the group's resolve is. <i>Is this what we want?</i>	
Conclusion	See below	

Implementation Planning

Rational Objective: See above

Existential Aim: See above

Step	Procedure	Notes
Context	See above	
Movements	Discerning The Situation 4 <i>Are there any unclear issues?</i> 5 Individually list advantages that we have in reaching our goal. 6 Put these on the board. 7 List the points of vulnerability that we have in achieving the goal. 8 Put these on the board. Listing the Do's 9 In the light of the advantages and vulnerabilities, individually list 15-20 things to do to accomplish the goal. These can deal with vulnerabilities or benefit from advantages. 10 Star your best 5 things. 11 Go around the group and put up 50 to 100 actions on the board. The Intuitive Gestalt 12 I would like to ask one person to read rapidly aloud while the rest individually write down 3 arenas of action. 13 <i>Could someone read their lists of arenas of action.</i> Put up the list and allow a moment of quietness. Using this same process put up 4 complete lists of arenas. Ask the group to agree on the final list of 5 - 14 arenas.	
Conclusion	See below	

Implementation Planning

Rational Objective: See above

Existential Aim: See above

Step	Procedure	Notes
Context	See above	
Movements	The Reflective Chart 14 Organize the arenas into a rational chart that holds all arenas in dynamic relationship. 15 <i>We would like to give these arenas more motivating titles. Starting with the first arena ask: What would be a more poetic name for this arena?</i> Continue this until all the arenas have titles. 16 Assign teams to arenas and have them list the four components or sub-actions under each arena. 17 When the teams are done put the titles on a flipover. Review the components for each arena as a whole group and agree on titles. The Corporate Talk-Through 18 <i>I would like one person to act as the scribe for each arena. We will talk through each arena and these notes will be the basis of our plans.</i> Be sure to have one scribe per arena. If there are not enough people one person can scribe two arenas. 19 Select one person who is not the scribe for the arena to talk through the specifics of how to act out the arena, including its intent, key actions, personnel use, timing, etc.	
Conclusion	See below	

Implementation Planning

Rational Objective: See above

Existential Aim: See above

Step	Procedure	Notes
Context	See above	
Movements	20 After each talk-through spend a few minutes discussing it. <i>We want to spend only a few minutes talking about this arena.</i> ■ <i>Is there anything that should be added?</i> ■ <i>Is there something that should be taken out?</i> The Implementation Plan Write-up 21 Assign groups to write implementation plans for each arena. Each group is centered on respective scribes. Each team is to write a description of the actions in their arena. <i>This should include what is intended with the arena, the components of the arena, what activities are required to accomplish it, who is responsible for the activities, and any deadlines for completing or starting the work. People who are responsible for any actions should be in this room.</i> 22 <i>Are there any questions?</i> Return in 30 minutes. Finalize Implementation Plans 23 <i>We would like to have each team read their arena implementation plan.</i> Have each group read their plans including the timing. 24 After each team has read their plan ask, <i>"Are there any questions?"</i> 25 When all of the plans have been read make any changes to the plans and adjust timing and personnel use.	
Conclusion	See below	

Implementation Planning

Rational Objective: See above

Existential Aim: See above

Step	Procedure	Notes
Context	See above	
Movements	See above	
Conclusion	We want to spend a few minutes reflecting. <i>1 What are some of the key actions in this plan?</i> <i>2 What were you surprised about as we created it?</i> <i>3 Where were you excited about the plan?</i> <i>4 Where were you nervous?</i> <i>5 What is the key to the plan? What will make it a success?</i> <i>6 What have we accomplished today?</i> <i>7 What activity that you will be involved in are you looking forward to doing?</i>	



4

When Appropriate

Section Four: **When Appropriate**

The Implementation Planning process should be used any time a sustained group effort is required to reach an already agreed upon goal. It is most effective when the time frame is relatively short (three to six months).

The image features a large, bold, green number '5' on the left side. To its right, the text 'How to Develop' is written in a bold, black, sans-serif font. A thick black horizontal line underlines the text. The background is a light green, textured surface with a pattern of darker green, irregular, vein-like lines. On the far right edge, there is a vertical strip of dark, textured material.

5 **How to Develop**

Section Five: How to Develop

The Implementation Planning Workshop is a specialized form of the Basic Workshop Method. There are eight Movements instead of the usual three. Each movement is in a sense a “mini” workshop, sometimes brainstorming, sometimes brainstorming and organizing and sometimes discussing. Like any workshop, implementation planning has a context, movements and a closing.

See the worksheets.

The first step in preparing the workshop is to clarify the goal of the workshop. Write the goal of the plan, for example, *a more positive image of the department in the company* in the Rational Objective box. Write the existential aim of the workshop in its box.

In the **Naming The Victory** box write the questions that need to be asked to create a positive set of aspects of a successfully implemented plan. Ask people to use the present tense. Write how the list of aspects will be read through. Write how the group’s resolve will be checked.

In the **Discerning The Situation** box write what questions that will be asked to clarify any issues about the victory. Write the questions that will be used to have the group create a list of advantages that the planning group has in reaching their goal. Write how they will be displayed, for example put on the board, flipovers, etc. Write the questions that will be used to list the points of vulnerability in achieving the goal. Write how they will be displayed.

In the **Listing the Do’s** box write the questions and comments that will get the group to list all of the activities necessary considering the advantages and vulnerabilities to accomplish the goal. Decide and write how the activities will be displayed to the group.

In the **The Intuitive Gestalt** box write how an impressionistic organization of the actions will be created. It is possible to do this in a more structured way but this method is quick and relatively accurate. Write how the group's agreement will be gained.

In the **Reflective Chart** box write what questions will be asked to organize the arenas into a rational chart that holds all arenas in a dynamic relationship. Write the questions or comments heeded to have the group give motivating names to each arena. Write how the components of each arena will be created. Write how the components will be agreed on by the whole group.

In the **Corporate Talk-Through** box write the process by which the group will create an initial draft of the plans for each arena and how they will be recorded.

In the **Implementation Plan Write-up** box write how the second draft of the implementation plan will be written. This draft should include personnel, deadlines, materials, and actions.

In the **Finalize Implementation Plans** box write how the group will agree to the plans. How will the group make changes in the session?

Now turn to the context. Write how the session will start. This should include the objectives of the workshop and timing. Describe how the trainer will get "on stage".



6

Worksheets

Implementation Plan Workshop

Rational Objective: <i>Put the Rational Objective of the session here.</i>		Existential Aim: <i>Put the Existential Aim of the session here.</i>	
Step		Procedure	Notes
Context		<i>Put the context for the workshop here. Include the objectives, the way time will be spent. Explain what the goal of the plan is. Write how to check for agreement from the group.</i>	
Move-ments	Naming the Victory	<i>Write out how the group will brainstorm what the accomplished plan will look like. It is more effective when done as though it were already done, thus using present tense is best.</i>	
	Discerning the Situation	<i>Write out how the group will explore its advantages and vulnerabilities in accomplishing the plan.</i>	
	Listing the Do's	<i>Write out the questions to be used to get all of the actions required to do the plan listed.</i>	
	The Intuitive Gestalt	<i>Write out here the questions to be used to get the group to organize the do's (actions) into 8 to 14 arenas of activity.</i>	
Conclusion		see below	

Implementation Plan Workshop

Rational Objective:		Existential Aim: See above	
Step		Procedure	Notes
Context		See above	
Move-ments	The Reflective Chart	<i>Here write out the questions to be used to have the group organize the arenas into a chart. Write out how the facilitator will have the group give motivational titles to the arenas. These could be slogans based upon a common theme.</i>	
	The Corporate Talk-Through	<i>Write out here how the facilitator will have the group create an initial description how each arena will be implemented including timing, personnel, and activities.</i>	
	The Implementation Plan Write-up	<i>Write out how the facilitator will have the group write a draft of the plan.</i>	
	Finalize Implementation Plan	<i>Write out the questions and comments to be used by the facilitator to finalize the plan including who is responsible for each arena, any deadlines, personnel assignments, materials and check points.</i>	
Conclusion		<i>Write out how the facilitator will conclude the session.</i>	

Implementation Plan Workshop

Rational Objective:		Existential Aim:	
Step		Procedure	Notes
Context			
Move- ments	Naming the Victory		
	Discern- ing the Situation		
	Listing the Do's		
	The Intuitive Gestalt		
Conclusion		see below	

Implementation Plan Workshop

Rational Objective:		Existential Aim: See above	
Step		Procedure	Notes
Context		See above	
Move- ments	The Reflective Chart		
	The Corpor- ate Talk- Through		
	The Implemen- tation Plan Write-up		
	Finalize Implemen- tation Plan		
Conclusion		Write out the way the session will end here.	



Tips for Developing and Using

Section Seven: Tips for Developing and Using

- 1 This process can be very lively and rather wild. While not wanting to destroy this intense group involvement, the facilitator must remain in control of the process.
- 2 Your touchstone during the entire process is your agreed-upon goal - when anyone questions anything, go back to the goal for an answer.
- 3 You must build a strong sense of respect and trust in the group so that people are willing to risk their intuitions and wild ideas. You want it all.
- 4 Don't be afraid to give time for people to ponder and think about things. A few minutes of silence can often be very productive and it signals your commitment to getting the best from the group.
- 5 Be sure that everyone is involved in the process. A person's commitment to the implementation plan is built in and through the process - if they are not involved you are not building the commitment.
- 6 Encourage people to explore the edge of their thinking and push their insights.

A facilitator who is preparing to lead an implementation planning process using this method should consider the following:

- 1 It is critical that the facilitator has deep clarity on the group's goal which is the focus of the implementation planning process. This means that he is able to articulate it in such a manner that the whole group will agree. It is usually necessary to begin the session with a discussion of the goal and the facilitator should prepare carefully for this discussion using his insights as a basis for shaping a discussion plan. This is "naming the victory."
- 2 Again the facilitator should be prepared to push for clarity and inclusiveness in the group's thinking about the situation. It is important here that the lists be as inclusive as possible. One way to achieve this is to ask the group to look at the situation from different perspectives. The facilitator should think through several perspectives that he can suggest to the group.

- 3 In listing the do's it is important to enable the group to think comprehensively about the whole implementation process and not only to focus on the beginning and the most easily anticipated steps. A facilitator could do this by asking the group in their individual brainstorm to think across the time frame of the plan.
- 4 The facilitator must pay careful attention to the suggestions of people for the intuitive gestalt and hear what is behind people's suggestions and be able to combine suggestions. This step needs to have a sense of both excitement and drama without feeling rushed.
- 5 The facilitator should be prepared to give illustrations of a rational chart, poetic names, and to explain how you identify the four components in each arena.
- 6 In the corporate talk-through the facilitator must listen carefully and keep the discussion flowing in order that intuitions can come to the surface. You are out to put "life" into the plan at this point.
- 7 In phasing the plan across the whole time frame it is important to watch for internal consistency and establish a motivating flow of events.

8

References

Section Eight: **References**

Winning Through Participation, Laura J. Spencer, (Kendall/Hunt Publishing Co.), 1989.