

Leader's Guide



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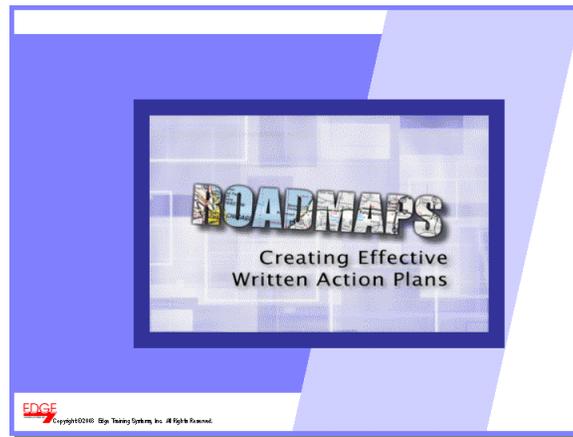
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# FACILITATING THE TRAINING MEETING

Display:

Slide #1



Slide #1

Say:

"In today's workshop we are going to learn skills for successful planning. In particular, we are going to learn how to create an effective written action plan. This is a skill that you will find useful throughout your career and in a number of different kinds of situations."

Explain:

Welcome the participants and describe any ground rules for the session, schedule, and administrative details such as the location of rest rooms, refreshments, etc.



Display:

Slide #3



Slide #3

Ask:

- Do you find it easy to make plans for the future? Why, or why not?
- Do you enjoy writing plans?

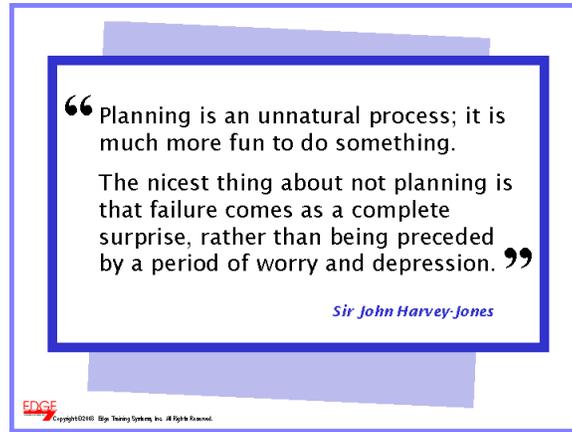
Discuss:

Discuss the topic of planning with your participants, allowing them to express their feelings, both positive and negative, about planning. You might direct the discussion toward the following ideas:

- Good planning is a discipline. By definition, discipline doesn't come easily, but is instilled by practice and habit.
- Good planning is a creative exercise. You must use imagination and be open to ideas and possibilities in order to create a good plan.
- Good planning is empowering. By breaking seemingly insurmountable goals into concrete steps and achievable objectives, you can reach higher success than you thought possible.

Display:

Slide #4



Slide #4

Explain:

Just as the author of this quotation suggests, planning is not a natural process for many people. Some people are naturally more action-oriented and view any type of planning as a waste of time when they could be “doing something.”

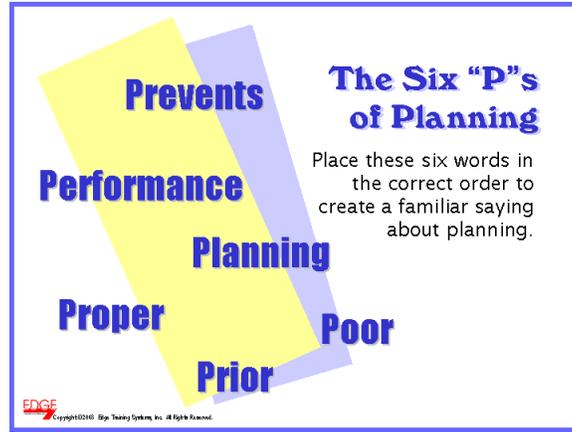
Other people might point out that “best laid plans” often don’t work out as expected. It’s impossible to predict the future with a high degree of accuracy, and even the best plans seldom work out exactly as written.

Ask:

- Does this mean that planning really is just a waste of your time?
- Do you think the author of this quotation is really opposed to planning? Or is he really saying something else?
- Do you prefer to be surprised by failure?

Display:

Slide #5



Slide #5

Refer To:

Page 2 Participant Guide - The Six "P"s of Planning

Explain:

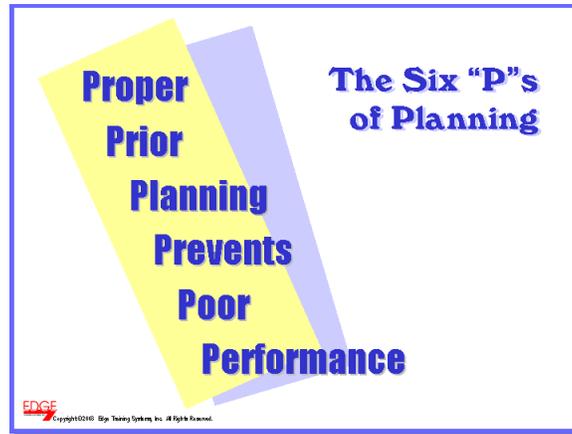
Ask your participants as a group to look at the six words on the slide (or on their handouts) and try to put them into the correct order to create a familiar saying or axiom regarding planning. Someone in the group may know or guess the saying right off, or it may take them a couple of minutes to sort it out to read:

**Proper Prior Planning Prevents Poor Performance.**

As your participants catch on to the right sequence of words, move on to the next slide to confirm the right answer.

Display:

Slide #6



Slide #6

Ask:

- How can having a plan in place help prevent poor performance?

Discuss:

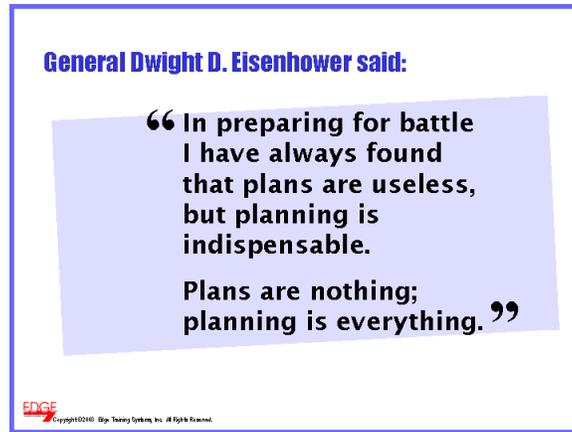
Explore with participants the ways that planning can help prevent problems, mistakes, wasting of time, and other poor performance issues.

Ask:

- Does having a plan guarantee good performance? Why, or why not?

Display:

Slide #7



Slide #7

Say:

"General Dwight Eisenhower, the top commander during World War II and, after that elected President of the United States, had this to say about planning."

Ask:

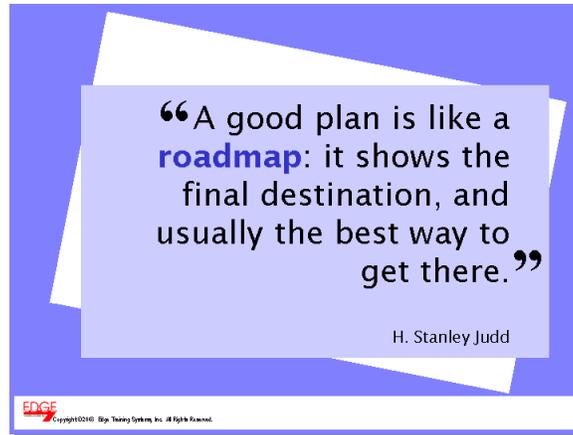
- What did he mean by this statement?

Discuss:

Plans by themselves can only provide a suggested course of action, and events or circumstances can change. The act of planning, however, requires you to examine many possible actions and think through what it is you want to accomplish. The resulting plan may or may not work exactly as written, but the careful thought and preparation that goes into writing the plan will also prepare you for the changes in course and alterations in the plan you might have to make down the road. Without that preparation, you will be less ready to meet challenges along your way.

Display:

Slide #8

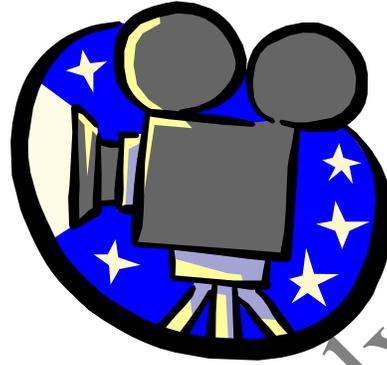


Slide #8

Say:

"Remember that 'writing a plan' is not your ultimate goal. Writing a plan is simply a way of mapping one route to your ultimate goal."

# Video Presentation



Say:

"We're now going to watch a nineteen-minute video that deals with the creation of an effective written action plan.

In the first couple of minutes, you're going to see an example of what some people might think about the need for planning, and how those people might go about writing an action plan.

You'll also see some brief examples of how written action plans might be used in a variety of situations and organizations.

Later in the video you will watch as an employee is guided through the process of creating an action plan, in this case, for personal development – an important kind of action plan if you are interested in moving ahead in your career."

Play Video:

Play "ROADMAPS – Creating an Effective Written Action Plan"

**Note to trainer:** *A black slide (Slide #9) has been provided in the accompanying PowerPoint presentation so that you can play the video without having to turn off the presentation projector if you so choose.*

Display:

Slide #10



Slide #10

Ask:

- Is good planning occurring here?

Say:

"Let's take a look at where the real problem lies in this scenario."

Display:

Slide #11



Slide #11

Ask:

- Is being in the same job for 18 years a bad thing, in and of itself?
- Is it possible to be in the same job for a long time and still continue to develop and improve your performance and job satisfaction?

Discuss:

Some people experience “job stagnation.” They become stale or stagnant in the same job. They have no desire to do better for themselves, much less for the organization that employs them. They just want to go through the motions every day.

Other people might do the same job for a long time, but they never seem to lose their desire to be the best they can be, and always find ways to improve and increase their performance and satisfaction in their job.

Planning is not effective without a genuine desire to create a positive result. Just “going through the motions” to create a plan that you don’t really believe in can be worse than having no plan at all.

For Preview purposes only

Display:

Slide #12



Slide #12

Say:

"For today's purposes, we will assume that each one of us has the desire to create a good plan.

We will each work together today to create a plan, practicing the process we have seen modeled in the video. To do this, I want to divide you up into groups. You will work with your partners to create a sample written action plan within today's session.

What type of plan you develop is up to you. As you have seen from the video, plans are used for all types of purposes. You will decide within your groups whether the plan you jointly develop will be related to a realistic work situation (perhaps a change to be implemented, or a work process you want to document), or whether it revolves around personal career development as in one of the video examples, or whether it has to do with some other topic that appeals to your group's imagination – building a zoo, maintaining the lighting fixtures in this building (how many of you does it take to screw in a light bulb?), or even making a hit music video. It's up to you. It's your vision to realize, your destination to decide."

Refer To:

Page 3 Participant Guide – What Is Your Vision?

Activity:

Divide participants into groups of three to six, depending upon the size of your class. Ask them to work together to complete their handout on vision. They will have eight minutes to complete the activity. Call time in eight minutes and ask each group to report their results. Record their answers on a flip chart and post the responses on the wall.

Display:

Slide #13



Slide #13

Say:

"Once you have the genuine desire to create an effective plan, and have taken the first preliminary step of establishing a vision for your plan, it's time to take the second preliminary step toward writing your plan. It's time to see where you stand right now, in relation to your desired outcome. This is an often-overlooked, but vital step in the process of planning. We're often tempted to say, 'Where do I want to go?' and then jump straight to 'What am I going to do to get there?' without ever asking 'Where am I right now?'"

Refer To:

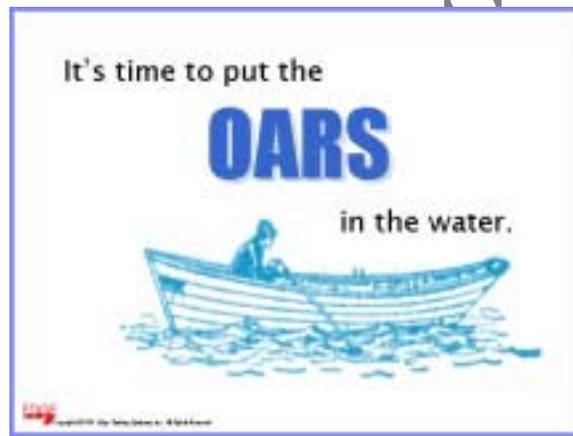
Page 4 Participant Guide – Make Your Assessment

Activity:

Ask your participants to work together within the same groups to complete this handout. They will have six minutes to complete the activity. Call time in six minutes and ask each group to keep their completed handouts on vision and assessment handy as they complete the process of creating their plan, so they can stay on track.

Display:

Slide #14



Slide #14

Say:

"We're now ready to begin the process of actually writing your plan. As you recall from the video, the four steps in this planning process form the acronym OARS."

Ask:

- Who can remember what the "O" stands for in our process of writing an action plan? (*objective*)
- What does the "A" stand for? (*actions*)
- What does the "R" stand for? (*resources*)
- What does the "S" stand for? (*schedule*)

Display:

Slide #15



Slide #15

Refer To:

Page 5 Participant Guide – Creating SMART Objectives

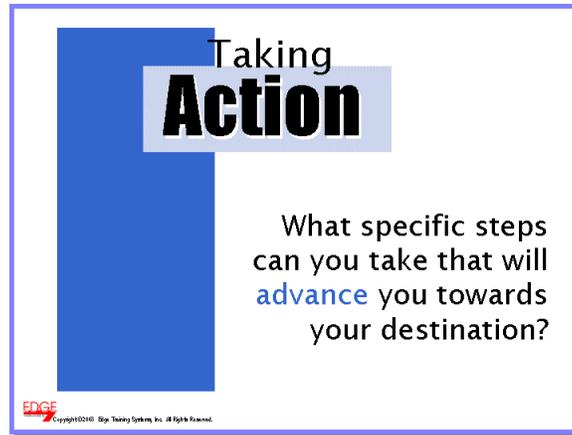
Activity:

Ask your participants to work together within the same groups to complete this handout. They will have 10 minutes to complete the activity. Call time in 10 minutes and ask each group to report their results. Record their answers on a flip chart and post the responses on the wall. Make sure you take time to review each written objective with the class and help the class confirm that each objective is specific, measurable, achievable, results oriented, and time-specific.

**Note:** *In addition, it is a good idea to prepare overhead transparencies or flip chart pages containing other appropriate sample objectives that might be relevant to your organization or participants to use as models in discussing objectives. This will help your participants prepare to transfer their learning into realistic work situations within your organization.*

Display:

Slide #16



Slide #16

Say:

"Once you have identified an objective, you can begin brainstorming action steps that will move you toward your objective. Each action step should be a simple, discrete action. Break down complex actions into their component steps and keep each action item as specific as you can."

Refer To:

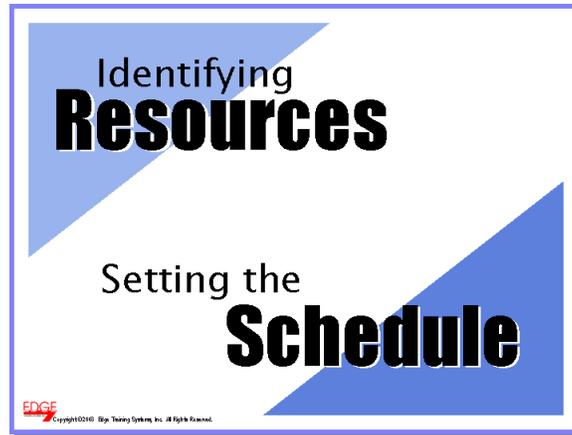
Page 6 Participant Guide – Taking Action

Activity:

Ask your participants to work together within the same groups to complete this handout. They will have 12 minutes to complete the activity. Call time in 12 minutes and ask each group to report their results. As each group reports, ask the class if they can suggest any other action steps that might be considered.

Display:

Slide #17



Slide #17

Say:

"After you have listed possible action steps, you should prioritize them and then list the possible resources that you could make use of in completing the action item. You must also assign a target date for completion to each action item that reflects its priority and is realistic."

Refer To:

Page 7 Participant Guide – Identifying Resources / Setting the Schedule

Activity:

Ask your participants to work together within the same groups to complete this handout. They will have 8 minutes to complete the activity. Call time in 8 minutes and confirm that each group has completed their activity successfully.

Display:

Slide #18



Slide #18

Say:

"We have practiced creating the key components of an effective written action plan. As you develop your plans further, it is likely that in order to reach your vision you will need to identify multiple objectives, and each objective may have a number of specific action steps. Flesh out your plans as fully as possible and chart a complete course that should get you safely to your destination.

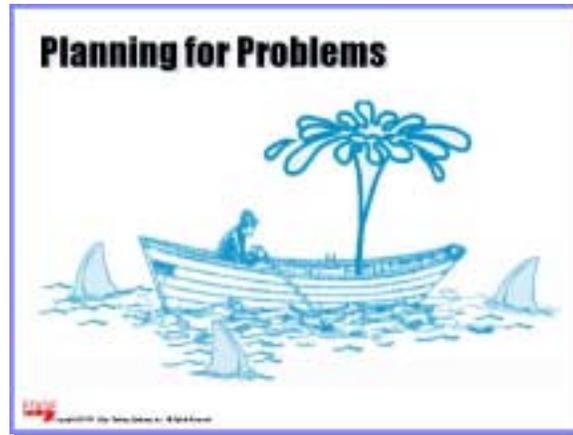
There is one area that the video didn't discuss directly, but it can be important for many action plans. It's one final step that you should often take, once you have written your proposed action plan."

Ask:

- When you go out in a boat, the Coast Guard recommends that you have what items available in the boat? (*life jackets*)

Display:

Slide #19



Slide #19

Say:

"You recall that at the beginning of our session today, we discussed the fact that plans often don't go as expected. In many types of plans, it is necessary to anticipate what might go wrong, and have a specific plan in place to meet that problem. This is called contingency planning, and it can be an important step to take once you have written your basic action plan. Read your plan carefully and ask yourself 'What could go wrong?' Identify as many potential problems with your plan as you can and prepare action steps you could take in the event that particular problem cropped up."

Refer To:

Page 8 Participant Guide – Sample Action Plans

Say:

“As you go back to your jobs, I want you to keep your handouts that detail the process of creating a written action plan. I’m also giving you a couple of brief sample action plans to show how action planning can be used in everyday situations to increase your productivity and performance on the job.”

Refer To:

Page 9 Participant Guide – Action Plan for Further Learning

Say:

“Now it’s time to turn our words here today into action for tomorrow. Think about the concepts we’ve discussed here today and select at least one area that you will commit to working on in the next month to improve your planning skills. Perhaps you need more practice writing SMART objectives, or maybe you want to learn more about how to assess your strengths and needs. Whatever area you select to focus on, I want you to commit to creating a short but effective action plan for your continued learning in that area.”