

TWELVE STEPS TO DECENTRALIZED PLANNING

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***Preface:** - These are not "stand-alone" instructions. Without the direct guidance of Centralized Planning Control, these steps will not yield what is needed for an integrated Product Assurance planning effort. These, and the attached Tentative Planning Matrix are guidelines only, intended to complement your communication with the overall organization in this development of workable and useful plans.*

1. KNOW THE MAINLINE OBJECTIVES AND ASSIGNED DESCENDING OBJECTIVES.

The "mainline objectives" are those published as a part of Product Assurance's 1985 objectives. Each Product Assurance employee, especially each supervisor, should be familiar with all objectives described there, and knowledgeable regarding objectives impacting his/her own Department.

The "assigned descending objectives" are those identified by supervisors at various levels which support mainline objectives and which lead to or constitute responsibilities for the individual now planning his or her activity.

2. IDENTIFY THOSE YOU DIRECTLY AND LOGICALLY SERVE

Working with your supervisor, carefully list everyone of the objectives (from those described above) which you directly and logically serve. Those which do not flow logically from higher objectives or which otherwise do not belong in your plan may be dealt with within Step #7.

3. WRITE YOUR SUBOBJECTIVES.

For each of your objectives to be satisfied, certain things likely must be accomplished. These are subobjectives, and the Product Assurance 1985 Objectives paper is replete with examples of how objectives and subobjectives are graphed and described.

Take care not to describe procedures; procedures are things you do, actions you take; objectives and subobjectives are things you want to accomplish. Each subobjective should be written so it is distinct from each other; and each should be necessary for the accomplishment of the objective it serves. All necessary subobjectives should be described.

4. WRITE A SIMPLE TENTATIVE PLAN SERVING YOUR OBJECTIVES AND SUBOBJECTIVES

Determine which of your objectives and subobjectives should be assigned to subordinates and which you should personally serve. List all objectives and subobjectives on the "Tentative Planning Matrix" along with the names of responsible individuals. As a guideline, more than two top level objectives per individual often precludes optimal performance. Subordinate objectives in direct support of a single top level objective may be many, depending on complexity and time constraints; but the common focus of the higher objective can make them at least manageable by a single individual.

Having listed what you are going to do, the "how" and "when" should be described – but SIMPLY (remember "K. I.S.S. ")! Is each an ongoing or specific-date objective? How will you and others know the job is being done? -- are there indicators of performance? -- who will report to who, how often, and through what format? These are simply "fill-ins" on the "Tentative Planning Matrix". Short words or phrases are all that are required at this stage, not a technical composition.

5. COMMUNICATE YOUR PLAN UP AND DOWN LINE.

First, communicate your plan to your supervisor to be sure you are working to the correct assigned objectives -- or to objectives that should be assigned. Next, communicate downline so that your subordinates can begin at Step #1 with their objectives.

6. WELCOME FEEDBACK AND ADJUST YOUR PLAN TO IT.

In accordance with AVCO's philosophy of participative management, be open to critical comment from your subordinates regarding the definition and assignment of objectives. Their perspective should be valuable to you and welcomed by you; and yours in turn should be welcomed by your supervisor. The key to making objectives realistic and achievable is to gain whole-hearted understanding and agreement as to just what they are. The supervisor must be directive and decisive when it is needed, but only after he has listened, and with a genuine attitude that the other guy might just be right.

7. IDENTIFY ACTIVITIES WHICH DO NOT SERVE YOUR OBJECTIVES.

All your activities have some purpose, serve some objective, or they should be dropped forthwith. "Type I" objectives are those which match the organizational unit's design and purpose; and that design and purpose should be in support of the Mainline Objectives. "Type II" objectives are quite simply those which do not meet the definition of Type I.

8. COMMUNICATE THEM.

Rectifying adjustments should be made in assignments and even in organization to minimize Type II objectives. Change what you can, and pass upline what higher authority must change. No one can correct what they cannot see; and no one should assume that others do see. Tell them!

9. FINALIZE PLAN.

Your plan should be finalized – not made permanent, not elaborated upon *or* expanded -- simply put into condition as a convenient tool for you to use in your specific role on the team. It should be neat and orderly, and fit with the plans of supervisors, subordinates, coworkers, and others dependent on your operations. You work to your plan; they'll work to their's; each tool should fit the hands of the craftsman using it, yet be readily understood by those who must complement it with their own.

10. ADD INDICATORS AND MEASURES OF PERFORMANCE.

Include all potential indicators of performance in your plan, whether they are "measures" (i.e., quantifiable) or not. We do not want to exclude meaningful management information because numeric operations cannot be applied. Appropriately quantifiable data is valuable; but two types of errors must be avoided:

1. ignoring meaningful data which cannot be quantified or subjected to certain mathematical operations; and

2. forcing mathematical operations (eg. averaging) on data simply not susceptible to it.

Put simply, if you feel certain variables or signs might be useful performance indicators, don't think they must be eliminated because they can't be translated into numbers; and don't think you've got to quantify them to make them look good. Include them; and let some mathematical types help you select the appropriate math level, if any.

Once all potential indicators are identified, select the minimal amount to be actually used, with appropriate time frames. Keep it simple (again remember "K.I.S.S"), developing a system to support management by exception.

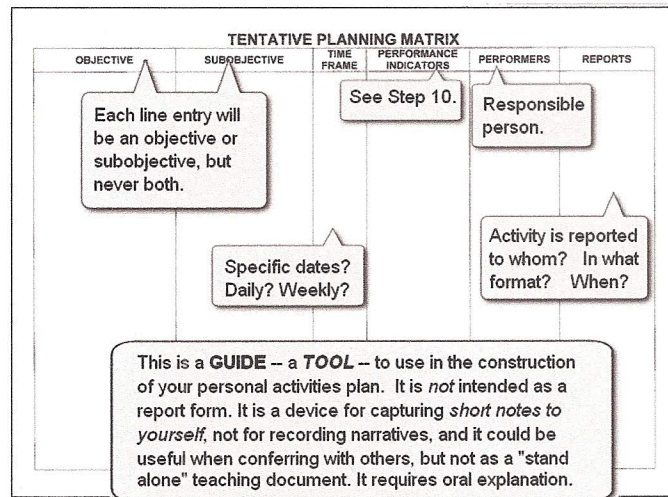
11. USE AS AN OPERATING AND EVALUATION GUIDELINE, NOT AS A BIBLE!

The plan is YOUR guideline. It is supposed to serve YOU -- not the other way around. The idea is to provide structured freedom to address objectives, not to inhibit performance by weighting down with either detailed verbiage or additional compliance demanding regulations.

A plan is a map that tells you how to get from one place to another. It does not say you cannot take detours *or* side trips. Its purpose is simply to insure that you know where you are, wherever it is.

12. REVIEW AND ADJUST PERIODICALLY WITH SUPERVISORS AND SUBORDINATES.

Side trips do become necessary, and objectives and conditions do change. New maps are then needed. Make your adjustments with the same care and consideration of others that you used to develop the first edition. Consult with supervisors, coworkers, and subordinates, but always keeping your eyes on objectives.



TENTATIVE PLANNING MATRIX

OBJECTIVE	SUBOBJECTIVE	TIME FRAME	PERFORMANCE INDICATORS	PERFORMERS	REPORTS