

Creating your 'Powerful Plan'¹ A Sound Leadership Resource*

Introduction

The tools provided at the Sound Leadership Deeper Dive on 14 July 2020 can be used to explore issues individually or in a group and generate actions that will make the greatest impact. These tools are based on the premise that it's better to get the thinking roughly right and get on with things than get overcomplicated or too precise. 'Perfection is the enemy of progress'. The aim is to be able to quickly see the results, learn and adjust. The tools can be used to help develop-up project/action plans, then used to tackle blockages or issues in those plans. Or even to establish a personal leadership action plan. You can use these tools individually or with a team or group.

Focus on what really matters: Pareto

Pareto (also known as the 80/20 rule) helps select the 20% of things which will have the biggest impact on the issue at hand. For example, from the initial Force Field you would select the top 2 or 3 forces that if addressed would have the biggest impact to get you moving in the direction you want.

Driving strategy into action: Force Field

Force Field is a powerful tool to identify key issues and generate high-impact actions. It can be quite tricky to get right the first time so practice will build confidence and familiarity. The power of this tool comes from the fact it looks at both the positive and negative forces that affect your movement towards your desired 'end in mind' (your WHERE).

Taking an issue into a detailed: One Page Plan (NOW-WHERE-HOW)

A One Page Plan (OPP) simply pulls together key things.

NOW - where you are at the moment

WHERE - where you want to end up

HOW – how you are going to get there

An OPP puts all the working and thinking you have done into an actionable plan, that can be monitored and updated over time and you (or you+team) can use it to drive issues or an opportunity at hand.

¹ These resources are drawn from the Mindshop toolset, modified by John Huigen (a Mindshop Advisor) for Soundfair Leadership.

Pareto analysis

This tool is used when you need to sort out the (vital) few key issues from the (trivial) many issues we need to consider each day. Pareto Analysis is based on the premise that 80% of problems we face are due to 20% of the possible causes. More positively, the notion is that you can positively influence outcomes by focussing on the 20% key drivers.

Vilfredo Pareto was an economist who is credited with establishing what is now widely known as the Pareto Analysis or 80/20 rule. When he discovered the principle, it established that 80% of the land in Italy was owned by 20% of the population. Later, he discovered that the Pareto principle was valid in other parts of his life, such as gardening: 80% of his garden peas were produced by 20% of the peapods.

How to use the principle

Assuming you have identified a range of things contributing to an issue or that need to be considered (e.g. via a Force Field, brainstorming, mindmapping), the Pareto principle can be applied. It can be applied in a number of ways, depending on group size, type of issue and so on.

Here are the steps assuming you are facilitating a group discussion, but you can draw the process from this if you are using the tool on your own.

Step 1 (if you haven't used the process before)

Ask the group what a Pareto Analysis is. Most professionals will know it. If not, explain the rule and background as above.

Step 2

Ask for examples of how the Pareto rule can work. Some examples that work well are shown below:

- **20%** of your customers provide **80%** of your **sales**
- **20%** of your clients require **80%** of the overall extra effort needed
- **20%** of your family members give you **80%** of the grief!
- **20%** of your social media followers provide **80%** of your follower reaction

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Step 3

Option 1: Voting

Ask participants to vote for the three top issues/strategies that contribute to 80% of the issue/solution/opportunity. (You can do this by issuing coloured dots, asking people to mark their choices on the whiteboard, etc.)

Count them up, land on your top two or three.

Option 2

Simply generate a discussion and land on your top three by consensus.

You want to avoid lengthy discussions; you are asking people to respond by gut feel. This is not a statistical exercise. You are after three obvious things that contribute to 80%, not 5,1245 things!

As a general rule it's fairly easy to land on the 'big ones', and gain consensus around that.

Force Field

Purpose

This tool is used to develop action plans focussing on the things that will make the greatest difference. It done by discovering what can be done to double the impact of the positive forces impacting on the issue and at the same time halving the forces that are impacting negatively on the issue. It can be used for virtually any issue.

Typical time taken to use

Allow between 20 and 60 minutes.

Where to use

Developing action plans, problem solving.

General usage hints

The more you use this tool, the more proficient with it and more powerful it will be for you. It can be used to help in 80% of the issues you face.

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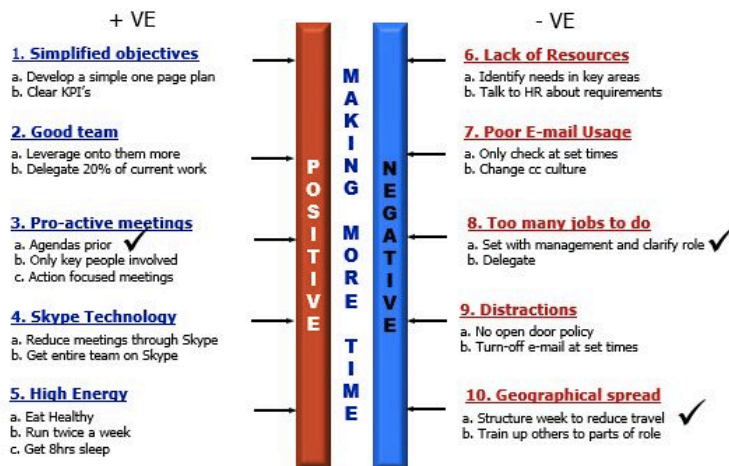
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Change will not occur when either the positive or the negative forces are equal. For change to occur and the issue to move forward, the positive force must overpower the negative force. We can do this by doubling the positive forces and halving the negative ones.

Example Force Field



Step-by-step guide

Start with the end in mind: WHERE do you want to get? It's useful to write this at the far right of the page.

Step 1. Draw two vertical parallel lines in the centre of your working area and write your *issue* requiring an action plan to be developed between the two lines, for example 'staffing' as shown above. So your WHERE might be a more profitable business, but in this example, the key issue you want to tackle is 'staffing'.

For example, the 'WHERE' might be 'a more person-centred service at my workplace'. The key issue you might focus on might be 'staff culture'.

Note, you can also use this tool at a higher level, as demonstrated at the 14/7/20 Sound Leadership Deeper Dive, where you define your WHERE and then go straight to all of the forces at play that are presently holding you at your NOW.

Step 2. On the left-hand side of the Force Field, list all the forces that are currently applied, or could be applied to move the issue in a positive direction. Write the name of each force on each line adjacent to an arrow.

Step 3. On the right hand side, list all the forces that are currently in place or could be in place that are stopping you from driving the issue in a positive direction. These are

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the **negative** influences on the issue. Write the name of each force on each line on the right-hand side of the force field next to an arrow.

Step 4. Having identified the positive and negative forces, the next step is look at how to double the positive forces and halve the negative forces. You can apply the 80/20 rule to identify the top few forces that have the greatest impact so that you don't get overwhelmed!

If you are able to increase and strengthen the forces on the positive side and weaken or remove the forces on the negative side, then your issue will move forward. How you do this with the group is:

- If you want to zero in on just the top few forces use the Pareto analysis (80/20) rule to pick the top 3 or so forces (either positive or negative; it doesn't matter)
- Go back to the left-hand side of the Force Field and say 'What would I need to do to make these positive forces twice as strong and double their impact?' As you say that make the arrows much bigger. Then write the suggested actions underneath each arrow as shown above.
- Then go to the right-hand side of the Force Field and say, "Do we want to double the negative forces?" No we don't! We want to halve them. Ask "what would I need to do to half the impact of these negative forces, reduce their strength or even remove them completely?" Then write the actions underneath each arrow as shown above.

Step 5. You will now see that you have doubled your positive forces and halved your negative forces. The sheer strength of the Force Field Analysis shows the strengthened positive issues pushing down your weakened negative issues and moving your issue in a positive direction. We normally find reducing the negative forces has a higher impact than increasing the positive forces.

Step 6. The last step is to prioritize the actions. If you have applied the Pareto rule you will have less of a prioritisation job to do. There are three easy ways for you to do this:

- The first way is to simply ask the team which five of these actions do they feel like doing.
- The second way is more analytical and requires you to rate on a scale of minus 5 (poor) to plus 5 (good) where you are now with each of the factors and where you want to be in say six months time. The arms of the Force Field provide the ideal audit tool as shown above.
- The third way is a team approach where the members of the team are each given three votes to select which actions they personally think need action. A vote is usually recorded by placing a mark/tick against the actions they vote for. After everyone has finished, select the actions that have scored the highest votes and they

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are the actions to be addressed. This is the most common way of ranking the actions.

- Or you could apply the Pareto rule again and ask ‘of all these possible actions, which of them would create 80% of the effect’. This approach might be likely to be effective if you’ve applied the Pareto tool at Step 1 but that will depend on how many action items you have developed under each ‘force’.

You will walk away from this process with a list of concrete actions that you can include in your HOW, in a One Page Plan.

One Page Plan (OPP)

Purpose

The One Page Plan is a simple yet effective tool to develop a business or personal plan. Using the **Now, Where, How** structure the One Page Plan shows where the organization, person, or issue is now, where it plans to be at some time in the future, and how it will get there. This **how** analysis lists the strategies, action plans, responsibilities and target timing for the key activities. The main advantage is the ease of completion and updating of the plan.

Typical time taken to use

Allow 15 minutes to 30 minutes (depending on complexity: longer if steps 1-3 aren’t used)

Where to use

To record the outcomes of any planning process. This process can be applied to an organization, part of an organization, and an individual.

Templates

- [Here](#) is an example of a OPP, used for a personal leadership ‘experiment’.
- [Here](#) is a blank OPP template.

General usage hints

Whenever you need to record the action plans the One Page Plan can be used. The plan needs to be strategic and this can be achieved by using tools such as the Force Field tool. It is the content of the plan and commitment to it that really matters.

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Plans can be lengthy and all-encompassing documents but the disadvantage they often become a static representation of past history and future plans, and not responsive or able to be used in an agile, 'learning while doing' way.

For this reason, Mindshop developed the concept of a One Page Business or Personal Plan. This was modified by Huigen Advisory to delineate the overall longer-term purpose (my ultimate WHERE), and the WHERE you or your team wants to get to in a short time frame, to support the idea of action learning, and to increase accountability and focus. Plans with long time-lines tend not to get really going!

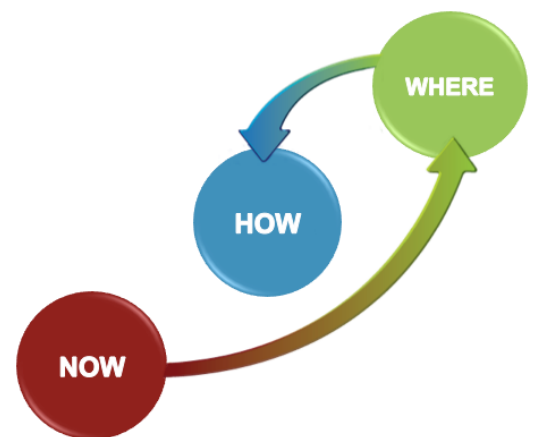
The OPP is a practical way to record the outcomes of the planning process. The One Page Plan uses the **Now-Where-How** tool structure.

NOW Analysis:

- Where are you NOW?
- Describe your current situation in bullet point form.
 - You need a clear understanding of the key elements
- Where are you NOW on the key issues

WHERE Analysis:

- Where would you like to be in the FUTURE on the Now issues?
 - It may include elements of the Vision and Mission statement statements
- It should include hard measures of 'what success looks like'.



Note: it can sometimes be helpful to start the process with the **Where**, creating a more open looking discussion.

Your ULTIMATE WHERE is longer term...

Your WHERE is at the end of a shorter period (e.g. a short experiment, or sprint). The shorter time period keeps the pressure on and the opportunity to learn from action more quickly.

HOW Analysis:

- These are strategies that will bridge the gap between the NOW and the WHERE
- The specific ACTION PLANS are generated from these strategies.
- The timing and responsibility of the action plans are listed.

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The advantages of the One Page Plan include: it takes only minutes to do (depending on the issue/project), it can be updated just as quickly, it's a control document for your business or personal improvement process, it's simple and easily understood. It is essential that you date the plan and to update it on at least a bimonthly basis (two months length of time for a 'sprint' – long enough to get something useful done, shorter enough to avoid 'drag'). It's usually only the action plans that need changing in the short term.

Step by Step Guide

**** This is a step by step guide if you were facilitating a group to develop a OPP. But the steps are still relevant if it's just you ****

Step 1. Introduce the Now Where How concept. Stress that the benefits of a 'One Page Plan' are that it is a working plan which is continuously reviewed / revised and easy to communicate to team members (to get action and focus) as opposed to the traditional 100 page plan which rarely gets updated (as it is too much work).

Step 2. Draw up the one-page format using the agreed template (or bring up the OPP template available from Sound Leadership [here](#)).

Step 3. Brainstorm the 'Now' analysis. Aim to develop about 7 or 8 key elements that summarise where you are NOW. Examples of the Now items are as follows:

- Not achieving the change I want
- Leading provider/supplier in the market.
- Poor financial performance over the last 3 years.
- Weak brand recognition

Step 4. Brainstorm the 'Where' Analysis. Include Vision elements) and Key Objectives. Examples of items are as follows:

- Better understanding of XYZ
- Established a group of passionate colleagues ready to tackle ABC
- Increase through put by 25%
- We will win by having the fastest response time in the industry.
- Launch two new products each year.

Step 5. Develop the strategies and specific action plans, drawing from tools such as mind mapping, Pareto analysis and force fields that may have been as part of the One Page Planning process. Use the Pareto Analysis tool to focus on the three to four key strategies, which will have the greatest impact on taking you from where you are NOW to WHERE you want to be.

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Step 6. You can use tools such as Force Field analysis to develop 3 to 4 key actions for each strategy. Make sure you specify a target date and a person responsible for each action item.

Step 7. Write a date on the plan and use whatever version-control protocols may be in place and stress the importance of updating the action plans at least bimonthly (preferably reviewed monthly).

** If used as a personal OPP, it is a really good idea to have an 'accountability partner' or buddy, so you can talk through your plan, help you reflect and learn and keep you accountable to the commitments you have made to yourself

Step 8. Ensure that there are three or four key performance measures that can be used to measure the plan results.

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