



The Big Blue Box Ltd

Planning: 3 Levels

The Background

L's business has grown significantly thanks to her raw energy, but there was now a need to take her skills to the next level. In a young business, used to reacting quickly, there was a culture of 'burn out'. L was certainly on that continuum! Could L and this culture adopt a more planned approach?

The Process

I asked L what her plan was for the session.

'I'd like to tell you about some of the things that have happened'.

L had a note book open in front of her but with no written notes or agenda, there was no evidence that she had actually prepared for our session. L chatted away, and after a few minutes I stopped her.

'Have you got a plan for this session? It looks like you are doing this from memory and don't have a plan or list prepared.'

Well, I don't really have one but... 'I've got so much to do, I had even considered postponing this session ... my head is full of things ... and I have to remember so much... things just keep coming at me... I'm reactive and I'd really need to be getting ahead of things.'

I had noticed that L also had a mobile device, a diary as well as a note book and some scraps of paper, but none seemed to be consistently in use, so I wondered how L planned and monitored, noted and listed items and managed her diary. L seemed to be managing on energy, reactions and memory.

It was clear that L had no plan and was struggling with, time, priority, planning and preparing. Delegation was also identified as an issue –

'I'm a perfectionist and I have to have control!'

We discussed what it was like to work in this way and L felt she needed to change.

We decided to make a start on the planning habit.

I asked L to make a list of the tasks that were most on her mind, and test it against factors such as timing, importance, could it be delegated, re negotiated or resourced in a different way?

And when it was written down, L noted that the list was smaller than it seemed in her imagination. Working through the immediate list she was able to decide how to approach each item.

We explored her use of a diary, a single daily journal – not lists of loose paper, and a review at the end of each day to carry uncompleted items over, finding time to think and plan, prioritising and delegating.

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The Outcome

When L's 'Director' joined us for the close of the session, a joint discussion identified that his own planning and management of L was missing a few tricks.

Together with her Director we again explored some simple planning skills, personal effectiveness, and delegation and engaged his support for L's ongoing mentoring.

L and her director committed to developing their first business plan for her business unit within the next month.