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Getting Projects Creatively Under Way: The Five Phases of Project Planning

You've got to think about the big things while you're doing small things, so that all the small things go in the right direction. —Alvin Toffler

THE KEY INGREDIENTS of relaxed control are (1) clearly defined outcomes (projects) and the next actions required to move them toward closure, and (2) reminders placed in a trusted system that is reviewed regularly. This is what I call horizontal focus. Although it may seem simple, the actual application of the process can create profound results.

Enhancing "Vertical" Focus

Horizontal focus is all you'll need in most situations, most of the time. Sometimes, however, you may need greater rigor and focus to get a project under control, to identify a solution, or to ensure that all the right steps have been determined. This is where vertical focus comes in. Knowing how to think productively in this more "vertical" way and how to integrate the results into your personal system is the second powerful behavior set needed for knowledge work.

The goal is to get projects and situations off your mind, but not to lose any potentially useful ideas.

This kind of thinking doesn't have to be elaborate. Most of the thinking you'll need to do is informal, what I call back-of-the-envelope planning—the kind of thing you do literally on the back of an envelope in a coffee shop with a colleague as you're hashing out the agenda and structure of

a sales presentation. In my experience this tends to be the most productive kind of planning you can do in terms of your output relative to the energy you put into it. True, every once in a while you may need to develop a more formal structure or plan to clarify components, sequences, or priorities. And more detailed outlines will also be necessary to coordinate more complex situations—if teams need to collaborate about various project pieces, for example, or if business plans need to be drafted to convince an investor you know what you're doing. But as a general rule, you can be pretty creative with nothing more than an envelope and a pencil.

The greatest need I've seen in project thinking in the professional world is not for more formal models; usually the people who need those models already have them or can get them as part of an academic or professional curriculum. Instead, I've found the biggest gap to be the lack of a project-focusing model for "the rest of us." We need ways to validate and support our thinking, no matter how informal. Formal planning sessions and high-horsepower planning tools (such as project software) can certainly be useful, but too often the participants in a meeting will need to have *another* meeting—a back-of-the-envelope session—to actu-
ally get a piece of work fleshed out and under control. More formal and structured meetings also tend to skip over at least one critical issue, such as *why* the project is being done in the first place. Or they don't allow adequate time for brainstorming, the development of a bunch of ideas nobody's ever thought about that would make the project more interesting, more profitable, or just more fun. And finally, very few such meetings bring to bear sufficient rigor in determining action steps and accountabilities for the various aspects of a project plan.

The good news is, there *is* a productive way to think about projects, situations, and topics that creates maximum value with minimal expenditure of time and effort. It happens to be the way we *naturally* think and plan, though not necessarily the way we *normally* plan when we consciously try to get a project under control. In my experience, when people do more planning, more

informally and naturally, they relieve a great deal of stress *and* obtain better results.

The Natural Planning Model

You're already familiar with the most brilliant and creative planner in the world: your brain. You yourself are actually a planning machine. You're planning when you get dressed, eat lunch, go to the store, or simply talk. Although the process may seem somewhat random, a quite complex series of steps in fact has to occur before your brain can make anything happen physically. Your mind goes through five steps to accomplish virtually any task:

The most experienced planner in the world is your brain.

1 | Defining purpose and principles
2 | Outcome visioning
3 | Brainstorming
4 | Organizing
5 | Identifying next actions

A Simple Example: Planning Dinner Out

The last time you went out to dinner, what initially caused you to think about doing it? It could have been any number of things—the desire to satisfy hunger, socialize with friends, celebrate a special occasion, sign a business deal, or develop a romance. As soon as any of these turned into a real inclination that you wanted to move on, you started planning. Your intention was your ***purpose,*** and it automatically triggered your internal planning process. Your *principles* created the boundaries of your plan. You probably didn't consciously think *about* your principles regarding going out to dinner, but you thought *within* them: standards of food and service, affordability, convenience, and comfort all may have

played a part. In any case, your purpose and principles were the defining impetus and boundaries of your planning.

Once you decided to fulfill your purpose, what were your first substantive thoughts? Probably not "point II.A.3.b. in plan." Your first ideas were more likely things like "Italian food at Giovanni's," or "Sitting at a sidewalk table at the Bistro Cafe." You probably also imagined some positive picture of what you might experience or how the evening would turn out—maybe the people involved, the atmosphere, and/or the outcome. That was your **outcome visioning.** Whereas your purpose was the *why* of your going out to dinner, your vision was an image of the *what*—of the physical world's looking, sounding, and feeling the ways that best fulfilled your purpose.

Once you'd identified with your vision, what did your mind naturally begin doing? What did it start to think about? "What time should we go?" "Is it open tonight?" "Will it be crowded?" "What's the weather like?" "Should we change clothes?" "Is there gas in the car?" "How hungry are we?" That was **brainstorming.** Those questions were part of the naturally creative process that happens once you commit to some outcome that hasn't happened yet. Your brain noticed a gap between what you were looking toward and where you actually were at the time, and it began to resolve that "cognitive dissonance" by trying to fill in the blanks. This is the beginning of the "how" phase of natural planning. But it did the thinking in a somewhat random and ad hoc fashion. Lots of different aspects of going to dinner just occurred to you. You almost certainly didn't need to actually write all of them down on a piece of paper, but you did a version of that process in your mind.*

Once you had generated a sufficient number of ideas and details, you couldn't help but start to *organize* them. You may

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*If, however, you were handling the celebration for your best friend's recent triumph, the complexity and detail that might accrue in your head should warrant *at least* the back of an envelope!

have thought or said, "First we need to find out if the restaurant is open", or "Let's call the Andersons and see if they'd like to go out with us." Once you've generated various thoughts relevant to the outcome, your mind will automatically begin to sort them by components (subprojects), priorities, and/or sequences of events. *Components* would be: "We need to handle logistics, people, and location." *Priorities* would be: "It's critical to find out if the client really would like to go to dinner." *Sequences* would be: "First we need to check whether the restaurant is open, then call the Andersons, then get dressed."

Finally (assuming that you're really committed to the project—in this case, going out to dinner), you focus on the ***next action*** that you need to take to make the first component actually happen. "Call Suzanne's to see if it's open, and make the reservation."

These five phases of project planning occur naturally for everything you accomplish during the day. It's how you create things—dinner, a relaxing evening, a new product, or a new company. You have an urge to make something happen; you image the outcome; you generate ideas that might be relevant; you sort those into a structure; and you define a physical activity that would begin to make it a reality. And you do all of that naturally, without giving it much thought.

Natural Planning Is Not Necessarily Normal

But is the process described above the way your committee is planning the church retreat? Is it how your IT team is approaching the new system installation? Is it how you're organizing the wedding or thinking through the potential merger?

Have you clarified the primary purpose of the project and communicated it to everyone who ought to know it? And have you agreed on the standards and behaviors you'll need to adhere to to make it successful?

Have you envisioned wild success lately? Have you envisioned success and considered all the innovative things that might result if you achieved it?

Have you gotten all possible ideas out on the table—everything you need to take into consideration that might affect the outcome?

Have you identified the mission-critical components, key milestones, and deliverables?

Have you defined all the aspects of the project that could be moved on right now, what the next action is for each part, and who's responsible for what?

If you're like most people I interact with in a coaching or consulting capacity, the collective answer to these questions is, probably not. There are likely to be at least some components of the natural planning model that you haven't implemented.

In some of my seminars I get participants to actually plan a current strategic project that uses this model. In only a few minutes they walk themselves through all five phases, and usually end up being amazed at how much progress they've made compared with what they have tried to do in the past. One gentleman came up afterward and told me, "I don't know whether I should thank you or be angry. I just finished a business plan I've been telling myself would take months, and now I have no excuses for not doing it!"

You can try it for yourself right now if you like. Choose one project that is new or stuck or that could simply use some improvement. Think of your purpose. Think of what a successful outcome would look like: where would you be physically, financially, in terms of reputation, or whatever? Brainstorm potential steps. Organize your ideas. Decide on the next actions. Are you any clearer about where you want to go and how to get there?

The Unnatural Planning Model

To emphasize the importance of utilizing the natural planning model for the more complex things we're involved with, let's contrast it with the more "normal" model used in most environments—
what I call unnatural planning.

When the "Good Idea" Is a Bad Idea

Have you ever heard a well-intentioned manager start a meeting with the question, "OK, so who's got a good idea about this?"

What is the assumption here? Before any evaluation of what's a "good idea" can be trusted, the purpose must be clear, the vision must be well defined, and all the relevant data must have been collected (brain-stormed) and analyzed (organized). "What's a good idea?" is a good question, but only when you're about 80 percent of the way through your thinking! *Starting* there would probably blow anyone's creative mental fuses.

> If you're waiting to have a good idea before you have any ideas, you won't have many ideas.

Trying to approach any situation from a perspective that is not the natural way your mind operates will be difficult. People do it all the time, but it almost always engenders a lack of clarity and increased stress. In interactions with others, it opens the door for egos, politics, and hidden agendas to take over the discussion (generally speaking, the most verbally aggressive will run the show). And if it's just you, attempting to come up with a "good idea" before defining your purpose, creating a vision, and collecting lots of initial bad ideas is likely to give you a case of creative constipation.

Let's Blame Mrs. Williams

If you're like most people in our culture, the only formal training you've ever had in planning and organizing proactively was in the fourth or fifth grade. And even if that wasn't the *only* education you've had in this area, it was probably the most emotionally intense (meaning it sank in the deepest).

> Outlines were easy, as long as you wrote the report first.

Mrs. Williams, my fourth-grade teacher, had to teach us about organizing our thinking (it was in her lesson plans). We were going to learn to write *reports.* But in order to write a well-organized, successful report, what did we have to write first? That's right— an *outline!*

Did you ever have to do that, create an outline to begin with? Did you ever stare at a Roman numeral I at the top of your page for a torturous period of time and decide that planning and organizing ahead of time were for people very different from you? Probably.

In the end, I did learn to write outlines. I just wrote the report first, then made up an outline from the report, after the fact.

That's what most people learned about planning from our educational system. And I still see outlines done after the fact, just to please the authorities. In the business world, they're often headed "Goals" and "Objectives." But they still have very little to do with what people are doing or what they're inspired about. These documents are sitting in drawers and in e-mails somewhere, bearing little relationship to operational reality.

The Reactive Planning Model

The unnatural planning model is what most people consciously think of as "planning," and because it's so often artificial and irrelevant to real work, people just don't plan. At least not on the front end: they resist planning meetings, presentations, and strategic operations until the last minute.

But what happens if you don't plan ahead of time? In many cases, crisis! ("Didn't you get the tickets? I thought you were going to do that?!") Then, when the urgency of the last minute is upon you, the reactive planning model ensues.

When you find yourself in a hole, stop digging.
—Will

What's the first level of focus when the stuff hits the fan? *Action!* Work harder! Overtime! More people! Get busier! And a lot of stressed-out people are thrown at the situation.

Then, when having a lot of busy people banging into each other doesn't resolve the situation, someone gets more

sophisticated and says, "We need to get ***organized!''*** (Catching on now?) Then people draw boxes around the problem and label them. Or *redraw* the boxes and *relabel* them.

Don't just do something. Stand there.
—Rochelle Myer

At some point they realize that just redrawing boxes isn't really doing much to solve the problem. Now someone (much more sophisticated) suggests that more creativity is needed. "Let's ***brainstorm!''*** With everyone in the room, the boss asks, "So, who's got a *good* idea here?" (Thank you, Mrs. Williams.) When not much happens, the boss may surmise that his staff has used up most of its internal creativity. Time to hire a consultant! Of course, if the consultant is worth his salt, at some point he is probably going to ask the big question: "So, what are you really trying to *do* here, anyway?" ***(vision,purpose).***

The reactive style is the *reverse* of the natural model. It will always come back to a top-down focus. It's not a matter of *whether* the natural planning will be done—just *when,* and at what cost.

Natural Planning Techniques: The Five Phases

It goes without saying, but still it must be said again: thinking in more effective ways about projects and situations can make things happen sooner, better, and more successfully. So if our minds plan naturally anyway, what can we learn from that? How can we use that model to facilitate getting more and better results in our thinking?

Let's examine each of the five phases of natural planning and see how we can leverage these contexts.

Purpose

It never hurts to ask the "why?" question. Almost anything you're currently doing can be enhanced and even galvanized by more

scrutiny at this top level of focus. Why are you going to your next meeting? What's the purpose of your task? Why are you having friends over for a barbeque in the backyard? Why are you hiring a marketing director? Why do you have a budget?

Fanaticism consists of redoubling your efforts when you have forgotten your aim.

—

George

I admit it: this is nothing but advanced common sense. To know and to be clear about the purpose of any activity are prime directives for clarity, creative development, and cooperation. But it's common sense that's not commonly practiced, simply because it's so easy for us to create things, get caught up in the form of what we've created, and let our connection with our real and primary intentions slip.

I know, based upon thousands of hours spent in many offices with many sophisticated people, that the "why?" question cannot be ignored. When people complain to me about having too many meetings, I have to ask, "What is the purpose of the meetings?" When they ask, "Who should I invite to the planning session?" I have to ask, "What's the purpose of the planning session?" Until we have the answer to *my* questions, there's no possible way to come up with an appropriate response to *theirs.*

The Value of Thinking About "Why"
Here are just some of the benefits of asking "why?":

• It defines success.
• It creates decision-making criteria.
• It aligns resources.
• It motivates.
• It clarifies focus.
• It expands options.

Let's take a closer look at each of these in turn.

People love to win. If you're not totally clear about the purpose of what you're doing, you have no chance of winning.

Celebrate any progress. Don't •wait to get perfect. —Ann McGee Cooper

about the purpose of what you're doing, you have no

es Success People are starved for "wins" these days. We lay games, and we like to win, or at least be in a position where we *could* win. And if you're not totally clear chance of winning. Purpose defines success. It's the primal reference point for any investment of time and energy, from deciding to run for elective office to designing a form.

Ultimately you can't feel good about a staff meeting unless you know what the purpose of the meeting was. And if you want to sleep well, you'd better have a good answer when your board asks why you fired your V.P. of marketing or hired that hotshot M.B.A. as your new finance director. You won't really know whether or not your business plan is any good until you hold it up against the success criterion that you define by answering the question "Why do we need a business plan?"

It Creates Decision-Making Criteria How do you decide whether to spend the money for a five-color brochure or just

Often the only way to make a hard decision is to come back to the purpose.

go with a two-color? How do you know whether it's worth hiring a major Web design firm to handle your new Web site?

It all comes down to purpose. Given what you're trying to accomplish, are these resource investments required, and if so, which ones? There's no way to know until the purpose is clarified.

It Aligns Resources How should we spend our staffing allocation in the corporate budget? How do we best use the cash flow right now to maximize our viability as a retailer over the next year? Should we spend more money on the luncheon or the speakers for the monthly association meeting?

In each case, the answer depends on what we're really trying to accomplish—the *why*.

It Motivates Let's face it: if there's no good *reason* to be doing something, it's not worth doing. I'm often stunned by how many people have forgotten *why* they're doing what they're doing—and by how quickly a simple question like "Why are you doing that?" can get them back on track.

It Clarifies Focus When you land on the real purpose for anything you're doing, it makes things clearer. Just taking two minutes and writing out your primary reason for doing something invariably creates an increased sharpness of vision, much like bringing a telescope into focus. Frequently, projects and situations that have begun to feel scattered and blurred grow clearer when someone brings it back home by asking, "What are we really trying to accomplish here?"

It Expands Options   Paradoxically, even as purpose brings things into pinpoint focus, it opens up creative thinking about wider possibilities. When you really know the underlying "why"—for the conference, for the staff party, for the elimination of the management position, or for the merger—it expands your thinking about how to make the desired result happen. When people write out their purpose for a project in my seminars, they often claim it's like a fresh breeze blowing through their mind, clarifying their vision of what they're doing.

> If you're not sure why you're doing something, you can never do enough of it.

Is your purpose clear and specific enough? If you're truly experiencing the benefits of a purpose focus—motivation, clarity, decision-making criteria, alignment, and creativity—then your purpose probably *is* specific enough. But many "purpose statements" are too vague to produce such results. "To have a good department," for example, might be too broad a goal. After all, what constitutes a "good department"? Is it a group of people who are highly motivated, collaborating in healthy ways, and taking

initiative? Or is it a department that comes in under budget? In other words, if you don't really know when you've met your purpose or when you're off track, you don't have a viable directive. The question "How will I know when this is off-purpose?" must have a clear answer.

Principles

Of equal value as prime criteria for driving and directing a project are the standards and values you hold. Although people seldom think about these consciously, they are always there. And if they are violated, the result will inevitably be unproductive distraction and stress.

A great way to think about what your principles are is to complete this sentence: "I would give others totally free rein to do this as long as they. . ."—what? What policies, stated or unstated, will apply to your group's activities? "As long as they stayed within budget"? "satisfied the client"? "ensured a healthy team"? "promoted a positive image"?

Simple, clear purpose and principles give rise to complex and intelligent behavior. Complex rules and regulations give rise to simple and stupid behavior.
—Dee

It can be a major source of stress when others engage in or allow behavior that's outside your standards. If you never have to deal with this issue, you're truly graced. If you do, some constructive conversa-.tion about and clarification of principles could align the energy and prevent unnecessary conflict. You may want to begin by asking yourself, "What behavior might undermine what I'm doing, and how can I prevent it?" That will give you a good starting point for defining your standards.

Another great reason for focusing on principles is the clarity and reference point they provide for positive conduct. How do you want or need to work with others on this project to ensure its success? You yourself are at your best when you're acting how?

Whereas purpose provides the juice and the direction, principles define the parameters of action and the criteria for excellence of behavior.

Vision/Outcome

In order most productively to access the conscious and unconscious resources available to you, you must have a clear picture in your mind of what success would look, sound, and feel like. Purpose and principles furnish the impetus and the monitoring, but vision provides the actual blueprint of the final result. This is the "what?" instead of the "why?" What will this project or situation really be like when it successfully appears in the world?

For example, graduates of your seminar are demonstrating consistently applied knowledge of the subject matter. Market share has increased 2 percent within the northeastern region over the last fiscal year. Your daughter is clear about your guidelines and support for her first semester in college.

The Power of Focus

Since the 1960s thousands of books have expounded on the value of appropriate positive imagery and focus. Forward-looking focus has even been a key element in Olympic-level sports training, with athletes imagining the physical effort, the positive energy, and the successful result to ensure the highest level of unconscious support for their performance.

We know that the focus we hold in our minds *Imagination is* affects what we perceive and how we perform. This is *more important* as true on the golf course as it is in a staff meeting or *than knowledge.* during a serious conversation with a spouse. My *—Albert Einstein* interest lies in providing a model for focus that is dynamic in a practical way, especially in project thinking.

When you focus on something—the vacation you're going to take, the meeting you're about to go into, the product you want to launch—that focus instantly creates ideas and thought patterns you wouldn't have had otherwise. Even your physiology will respond to an image in your head as if it were reality.

The Reticular Activating System The May 1957 issue of *Scientific American* contained an article describing the discovery of the reticular formation at the base of the brain. The reticular formation is basically the gateway to your conscious awareness; it's the switch that turns on your perception of ideas and data, the thing that keeps you asleep even when music's playing but wakes you if a special little baby cries in another room.

Your automatic creative mechanism is teleological. That is, it operates in terms of goals and end results. Once you give it a definite goal to achieve, you can depend upon its automatic guidance system to take you to that goal much better than "you" ever could by conscious thought. "You" supply the goal by thinking in terms of end results. Your automatic mechanism then supplies the means whereby.
—Maxwell Maltz

Just like a computer, your brain has a search function—but it's even more phenomenal than a computer's. It seems to be programmed by what we focus on and, more primarily, what we identify with. It's the seat of what many people have referred to as the paradigms we maintain. We notice only what matches our internal belief systems and identified contexts. If you're an optometrist, for example, you'll tend to notice people wearing eyeglasses across a crowded room; if you're a building contractor, you may notice the room's physical details. If you focus on the color red right now and then just glance around your environment, if there is any red at all, you'll see even the tiniest bits of it.

The implications of how this filtering works—how we are unconsciously made conscious of information—could fill a weeklong seminar. Suffice it to say that something automatic and extraordinary happens in your mind when you create and focus on a clear picture of what you want.

Clarifying Outcomes

There is a simple but profound principle that emerges from understanding the way your perceptive filters work: *you won't see how to do it until you see yourself doing it.*

It's easy to envision something happening if it has happened before or you have had experience with similar successes. **It** can be

quite a challenge, however, to identify with images of success if they represent new and foreign territory— that is, if you have few reference points about what an event might actually look like and little experience of your own ability to make it happen.

You often need to make it up in your mind before you can make it happen in your life.

Many of us hold ourselves back from imaging a desired outcome unless someone can show us *how to get there.* Unfortunately, that's backward in terms of how our minds work to generate and recognize solutions and methods.

One of the most powerful skills in the world of knowledge work, and one of the most important to hone and develop, is creating clear outcomes. This is not as self-evident as it may sound. We need to constantly define (and redefine) what we're trying to accomplish on many different levels, and consistently reallocate resources toward getting these tasks completed as effectively and efficiently as possible.

I always wanted to be somebody. I should have been more specific.
—Lily

What will this project look like when it's done? How do you want the client to feel, and what do you want him to know and do, after the presentation? Where will you be in your career three years from now? How would the ideal V.P. of finance do his job? What would your Web site really look like and have as capabilities if it could be the way you wanted it?

Outcome/vision can range from a simple statement of the project, such as "Finalize computer-system implementation," to a completely scripted movie depicting the future scene in all its glorious detail. Here are three basic steps for developing a vision:

1 | View the project from beyond the completion date.
2 | Envision "WILD SUCCESS"! (Suspend "Yeah, but. . .")
3 | Capture features, aspects, qualities you imagine in place.

When I get people to focus on a successful scenario of their project, they usually experience heightened enthusiasm and think

of something unique and positive about it that hadn't occurred to them before. "Wouldn't it be great if. . ." is not a bad way to start thinking about a situation, at least for long enough to have the option of getting an answer.

The best way to get a good idea is to get lots of ideas.
*—Linus Pauling*

Brainstorming

Once you know what you want to have happen, *and why,* the "how" mechanism is brought into play. When you identify with some picture in your mind that is different from your current reality, you automatically start filling in the gaps, or brainstorming. Ideas begin to pop into your head in somewhat random order—little ones, big ones, not-so-good ones, good ones. This process usually goes on internally for most people about most things, and that's often sufficient. For example, you think about what you want to say to your boss as you're walking down the hall to speak to her. But there are many other instances when writing things down, or capturing them in some external way, can give a tremendous boost to productive output and thinking.

Your mind wants to fill in the blanks between here and there, but in somewhat random order.

Capturing Your Ideas

Over the last few decades, a number of graphics-oriented brainstorming techniques have been introduced to help develop creative thinking about projects and topics. They've been called things like mind-mapping, clustering, patterning, webbing, and fish-boning. Although the authors of these various processes may portray them as being different from one another, for most of us end-users the basic premise remains the same: give yourself permission to capture and express *any* idea, and then later on figure out how it fits in and what to do with it. If nothing else (and there is plenty of "else"), this practice adds to your efficiency—when you have the idea, you grab it, which means you won't have to go "have the idea" again.

The most popular of these techniques is called mind-mapping, a name coined by Tony Buzan, a British researcher in brain functioning, to label this process of brainstorming ideas onto a graphic format. In mind-mapping, the core idea is presented in the center, with associated ideas growing out in a somewhat free-form fashion around it. For instance, if I found out that I had to move my office, I might think about computers, changing my business cards, all the connections I'd have to change, new furniture, moving the phones, purging and packing, and so on. If I captured these thoughts graphically it might start to look something like this:
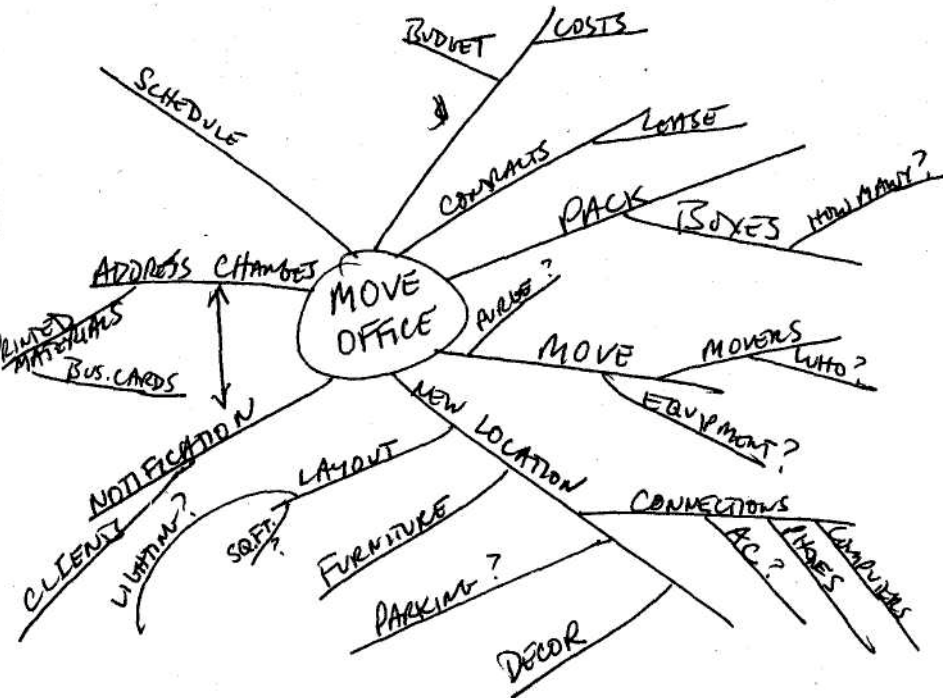
You could do this kind of mind-mapping on Post-its that could be stuck on a whiteboard, or you could input ideas into a word processor or outlining program on the computer.

Distributed Cognition

The great thing about external brainstorming is that in addition to capturing your original ideas, it can help generate many new ones that might not have occurred to you if you didn't have

Nothing is more dangerous than an idea when it is the only one you have.
—Emile Chartier

a mechanism to hold your thoughts and continually reflect them back to you. It's as if your mind were to say, "Look, I'm only going to give you as many ideas as you feel you can effectively use. If you're not collecting them in some trusted way, I won't give you that many. But if you're actually doing something with the ideas—even if it's just recording them for later evaluation—then here, have a bunch! And, oh wow! That reminds me of another one, and another," etc.

Psychologists are beginning to label this and similar processes "distributed cognition." It's getting things out of your head and into objective, reviewable formats. But my English teacher in high school didn't have to know about the theory to give me the key: "David," he said, "you're going to college, and you're going to be writing papers. Write all your notes and quotes on separate three-by-five cards. Then, when you get ready to organize your thinking, just spread them all out on the floor, see the structure, and figure out what you're missing." Mr. Edmundson was teaching me a major piece of the natural planning model!

Only he who handles his ideas lightly is master of his ideas, and only he who is master of his ideas is not enslaved by them.
—Lin Yutang

Few people can hold their focus on a topic for more than a couple of minutes, without some objective structure and tool or trigger to help them. Pick a big project you have going right now and just try to think of nothing else for more than sixty seconds. This is pretty hard to do unless you have a pen and paper in hand and use those "cognitive artifacts"

as the anchor for your ideas. Then you can stay with it for hours. That's why good thinking can happen while you're working on a computer document about a project, mind-mapping it on a legal pad of on a paper tablecloth in a hip restaurant, or just having a meeting about it with other people in a room that allows you to hold the context (a whiteboard with nice wet markers really helps there, too).

Brainstorming Keys
Many techniques can be used to facilitate brainstorming and out-of-the-box thinking. The basics principles, however, can be summed up as follows:

• Don't judge, challenge, evaluate, or criticize.
• Go for quantity, not quality.
• Put analysis and organization in the background.

Don't Judge, Challenge, Evaluate, or Criticize   It's easy for the unnatural planning model to rear its ugly head in brainstorming, making people jump to premature evaluations and critiques of ideas. If you care even slightly about what a critic thinks, you'll censure your expressive process as you look for the "right" thing to say. There's a very subtle distinction between keeping brainstorming on target with the topic and stifling the creative process. It's also important that brainstorming be put into the overall context of the planning process, because if you think you're doing it just for its own sake, it can seem trite and inappropriately off course. If you can understand it instead as something you're doing right now, for a certain period, before you move toward a resolution at the end, you'll feel more comfortable giving this part of the process its due.

A good way to find out what something might be is to uncover ail the things it's probably not.

   This is not to suggest that you should shut off critical think-ing, though—everything ought to be fair game at this stage. It's just wise to understand what kinds of thoughts you're having and

to park them for use in the most appropriate way. The primary criterion must be expansion, not contraction.

Go for Quantity, Not Quality Going for quantity keeps your thinking expansive. Often you won't know what's a good idea until you have it. And sometimes you'll realize it's a good idea, or the germ of one, only later on. You know how shopping at a big store with lots of options lets you feel comfortable about your choice? The same holds true for project thinking. The greater the volume of thoughts you have to work with, the better the context you can create for developing options and trusting your choices.

Put Analysis and Organization in the Background Analysis and evaluation and organization of your thoughts should be given as free a rein as creative out-of-the-box thinking. But in the brainstorming phase, this critical activity should not be the driver.

Making a list can be a creative thing to do, a way to consider the people who should be on your team, the customer requirements for the software, or the components of the business plan. Just make sure to grab all that and keep going until you get into the weeding and organizing of focus that make up the next stage.

Organizing

If you've done a thorough job of emptying your head of all the things that came up in the brainstorming phase, you'll notice that a natural organization is emerging. As my high school English teacher suggested, once you get all the ideas out of your head and in front of your eyes, you'll automatically notice natural relationships and structure. This is what most people are referring to when they talk about "project plans."

Organizing usually happens when you identify components and subcomponents, sequences or events, and/or priorities. What are the things that must occur to create the final result? In what order must they occur? What is the most important element to ensure the success of the project?

This is the stage in which you can make good use of structuring tools ranging from informal bullet points, scribbled literally on the back of an envelope, to project-planning software like Microsoft Project. When a project calls for substantial objective control, you'll need some type of hierarchical outline with components and subcomponents, and/or a GANTT-type chart showing stages of the project laid out over time, with independent and dependent parts and milestones identified in relationship to the whole.

A "project plan" identifies the smaller outcomes, which can then be naturally planned.

Creative thinking doesn't stop here; it just takes another form. Once you perceive a basic structure, your mind will start trying to "fill in the blanks." Identifying three key things that you need to handle on the project, for example, may cause you to think of a fourth and a fifth when you see them all lined up.

The Basics of Organizing

The key steps here are:
• Identify the significant pieces.
• Sort by (one or more):
    • components
    • sequences
    • priorities
• Detail to the required degree.

I have never seen any two projects that needed to have exactly the same amount of structure and detail developed in order to get things off people's minds and moving successfully. But almost all projects can use some form of creative thinking from the left side of the brain, along the lines of "What's the plan?"

Next Actions

The final stage of planning comes down to decisions about the allocation and reallocation of physical resources to actually get

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the project moving. The question to ask here is, "What's the next action?"

As we noted in the previous chapter, this kind of grounded, reality-based thinking, combined with clarification of the desired outcome, forms the critical component of knowledge work. In my experience, creating a list of what your real projects are and consistently managing your next action for each one will constitute 90 percent of what is generally thought of as project planning. This "runway level" approach will make you "honest" about all kinds of things: Are you really serious about doing this? Who's responsible? Have you thought things through enough?

At some point, if the project is an actionable one, this next-action decision must be made.* Answering the question about what specifically you would do about something physically if you had nothing else to do will test the maturity of your thinking about the project. If you're not yet ready to answer that question, you have more to flesh out at some prior level in the natural planning sequence.

The Basics
• Decide on next actions for each of the current moving parts of the project.
• Decide on the next action in the planning process, if necessary.

Activating the "Moving Parts" A project is sufficiently planned for implementation when every next-action step has been decided on every front that can actually be moved on without some other component's having to be completed first. If the project has multiple components, each of them should be assessed appropriately by asking, "Is there something that anyone could be doing on this right now?" You could be coordinating speakers for the confer-

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*You can also plan nonactionable projects and *not* need a next action—for example, designing your dream house. The lack of a next action by default makes it a "someday/maybe" project. . . and that's fine for anything of that nature.

ence, for instance, at the same time that you're finding the appropriate site.

In some cases there will be only one aspect that can be activated, and everything else will depend on the results of that. So there may be only one next action, which will be the linchpin for all the rest.

More to Plan? What if there's still more planning to be done before you can feel comfortable with what's next? There's still an action step—it is just a *process* action. What's the next step in the continuation of planning? Drafting more ideas. E-mailing Ana Maria and Sean to get their input. Telling your assistant to set up a planning meeting with the product team.

The habit of clarifying the next action on projects, no matter what the situation, is fundamental to you staying in relaxed control.

When the Next Action Is Someone Else's ... If the next action is not yours, you must nevertheless clarify whose it is (this is a primary use of the "Waiting For" action list). In a group-planning situation, it isn't necessary for everyone to know what the next step is on every part of the project. Often all that's required is to allocate responsibility for parts of the project to the appropriate persons and leave it up to them to identify next actions on their particular pieces.

This next-action conversation forces organizational clarity. Issues and details emerge that don't show up until someone holds everyone's "feet to the fire" about the physical-level reality of resource allocation. It's a simple, practical discussion to foster, and one that can significantly stir the pot and identify weak links.

How Much Planning Do You Really Need to Do?

How much of this planning model do you really need to flesh out, and to what degree of detail? The simple answer is, as much as you need to get the project off your mind.

In general, the reason things are on your mind is that the

outcome and the action step(s) have not been appropriately defined, and/or reminders of them have not been put in places where you can be trusted to look for them appropriately. Additionally, you may not have developed the details, perspectives, and solutions sufficiently to trust the efficacy of your blueprint.

Most projects, given my definition of a project as an outcome requiring more than one action, need no more than a listing of their outcome and next action for you to get them off your mind. You need a new stockbroker? You just have to call a friend for a recommendation. You want to set up a printer at home? You just need to surf the Web to check out different models and prices. I estimate that 80 percent of projects are of that nature. You'll still be doing the full planning model on all of them, but only in your head, and just enough to figure out next actions and keep them going until they're complete.

If the project is still on your mind, there's more planning to do.

Another 15 percent or so of projects might require at least some external form of brainstorming—maybe a mind-map or a few notes in a word processor or PowerPoint file. That might be sufficient for planning meeting agendas, your vacation, or a speech to the local chamber of commerce.

A final 5 percent of projects might need the deliberate application of one or more of the five phases of the natural planning model. The model provides a practical recipe for unsticking things, resolving them, and moving them forward productively. Are you aware of a need for greater clarity, or greater action, on any of your projects? If so, using the model can often be the key to making effective progress.

Need More Clarity?

If greater clarity is what you need, shift your thinking *up* the natural planning scale. People are often very busy *{action)* but nonetheless experience confusion and a lack of clear direction. They need to pull out their plan, or create one *{organize).* If there's

a lack of clarity at the planning level, there's probably a need for more *brainstorming* to generate a sufficient inventory of ideas to create trust in the plan. If the brainstorming session gets bogged down with fuzzy thinking, the focus should shift back to the *vision* of the outcome, ensuring that the reticular filter in the brain will open up to deliver the best how-to thinking. If the *outcome/ vision* is unclear, you must return to a clean analysis of why you're engaged in the situation in the first place *{purpose).*

Need More to Be Happening?

If more action is what's needed, you need to move *down* the model. There may be enthusiasm about the *purpose* of a project but at the same time some resistance to actually fleshing out what fulfilling it in the real world might look like. These days, the task of "improving quality of work life" may be on the radar for a manager, but often he won't yet have defined a clear picture of the desired result. The thinking must go to the specifics of the *vision.* Again, ask yourself, "What would the outcome look like?"

Plans get you into things but you've got to work your way out.

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If you've formulated an answer to that question, but things are still stuck, it's probably time for you to grapple with some of the "how" issues and the operational details and perspectives *{brainstorming).* I often have clients who have inherited a relatively clearly articulated project, like "Implement the new performance-review system," but who aren't moving forward because they haven't yet taken a few minutes to dump some ideas out about what that might entail.

If brainstorming gets hung up (and very often it does for more "blue sky" types), rigor may be required to do some evaluation of and decision-making about mission-critical deliverables that have to be handled *{organizing).* This is sometimes the case when an informal back-and-forth meeting that has generated lots of ideas ends without producing any decision about what actually needs to happen next on the project.

And if there *is* a plan, but the rubber still isn't hitting the road like it should, someone needs to assess each component with the focus of "What's the next action, and who's got it?" One manager, who had taken over responsibility many months in advance for organizing a major annual conference, asked me how to prevent the crisis all-nighters her team had experienced near the deadline the previous year. When she produced an outline of the various pieces of the project she'd inherited, I asked, "Which pieces could actually be moved on right now?" After identifying half a dozen, we clarified the next action on each one. It was off and running.

In the last two chapters, I have covered the basic models of how to stay maximally productive and in control, with minimal effort, at the two most basic levels of our life and work: the actions we take and the projects we enter into that generate many of those actions.

You need no new skills to increase your productivity-just a new set of behaviors about when and where to apply them.

The fundamentals remain true—you must be responsible for collecting all your open loops, applying a front-end thought process to each of them, and managing the results with organization, review, and action.

For all those situations that you have any level of commitment to complete, there is a natural planning process that goes on to get you from here to there. Leveraging that five-phase model can often make the evolution easier, faster, and more productive.

These models are simple to understand and easy to implement. Applying them creates remarkable results. You need essentially no new skills—you already know how to write things down, clarify outcomes, decide next actions, put things into categories, review it all, and make intuitive choices. *Right now* you have the ability to focus on successful results, brainstorm, organize your thinking, and get moving on your next steps.

But just knowing how to do all of those things does not pro-

duce results. Merely having the *ability* to be highly productive, relaxed, and in control doesn't make you that way. If you're like most people, you can use a coach—someone to walk you step by step through the experience and provide some guideposts and handy tricks along the way, until your new operational style is elegantly embedded.

You'll find that in part 2.