

# Getting Projects Under Control

CHAPTERS 4 THROUGH 9 have given you all the tricks and methods you need to clear your head and make intuitive choices about what to do when. That's the horizontal level—what needs your attention and action across the horizontal landscape of your life. The last piece of the puzzle is the vertical level—the digging deep and pie-in-the-sky thinking that can leverage your creative brainpower. That gets us back to refining and energizing our project planning.

## The Need for More Informal Planning

After years of working with thousands of professionals down in the trenches, I can safely say that virtually all of us could be doing more planning, more informally and more often, about our projects and our lives. And if we did, it would relieve a lot of pressure on our psyches and produce an enormous amount of creative output with minimal effort.

I've discovered that the biggest improvement opportunity in planning does not consist of techniques for the highly elaborate and complex kinds of project organizing that professional project managers sometimes use (like GANTT charts). Most of the people who need those already have them, or at least have access to the training and software required to learn about them. The real need is to capture and utilize more of the creative, proactive thinking we do—or *could* do.

The major reason for the lack of this kind of effective value-added thinking is the dearth of systems for managing the potentially infinite amount of detail that could show up as a result. This is why my approach tends to be bottom-up. If you feel out of control with your current actionable commitments, you'll resist focused planning. An unconscious pushback occurs. As you begin to apply these methods, however, you may find that they free up enormous creative and constructive thinking. If you have systems and habits ready to leverage your ideas, your productivity can expand exponentially.

In chapter 3, I covered in some detail the five phases of project planning that take something from the idea stage into physical reality.

*The middle of every successful project looks like a disaster.*

—Rosabeth Moss

What follows is a compilation of practical tips and techniques to facilitate the natural, informal planning processes I recommend. Although these suggestions are all based on common sense, they're not followed nearly as frequently as they could be. Put them to use whenever and as often as you can, instead of saving up your thinking for big formal meetings.

## Which Projects Should You Be Planning?

Most of the outcomes you have identified for your "Projects" list will not need any kind of front-end planning, other than the sort you do in your head, quickly and naturally, to come up with a next action on them. The only planning needed for "Get car inspected," for example, would be to decide to check the phone book for the nearest inspection location and call and set up a time. There are two types of projects, however, that deserve at least some sort of planning activity: (1) those that still have your attention even after you've determined their next actions, and (2) those

about which potentially useful ideas and supportive detail just show up.

The first type—the projects that you know have other things about them that must be decided on and organized—will need a more detailed approach than just identifying a next action. For these you'll need a more specific application of one or more of the other four phases of the natural planning model: purpose and principles, vision/outcome, brainstorming, and/or organizing.

The second type—the projects for which ideas just show up, ad hoc, on a beach or in a car or in a meeting—need to have an appropriate place into which these associated ideas can be captured. Then they can reside there for later use as needed.

### **Projects That Need Next Actions About Planning**

There are probably a few projects you can think of right now, off the top of your head, that you know you want to get more objectified, fleshed out, and under control. Perhaps you have an important meeting coming up and you know you have to prepare an agenda and materials for it. Or you've just inherited the job of coordinating the annual associates' conference, and you've got to get it organized as soon as possible so you can start delegating significant pieces. Or you've got to clarify a job description for a new position on your team to give to Human Resources. If you haven't done it already, get a next action *now* that will start the planning process for each of these, and put it on the appropriate action list. Then proceed with further planning steps.

### **Typical Planning Steps**

The most common types of planning-oriented actions will be your own brainstorming and organizing, setting up meetings, and gathering information.

***Brainstorming*** Some of the projects that have your attention right now will require you to do your own free-form thinking; this is especially true of those for which you were not clear about what

the next action would be when you made that decision. These should all have a next action, such as "Draft ideas re X."

You need to decide where and how you want to do that action, in order to know which action list to put it on. Do you do this kind of thinking best on a computer, or by hand-writing your thoughts on paper? I may choose either medium, depending on what my intuition tells me. For me this next action would go either on my "At Computer" list or on "Anywhere" (because I can draw mind-maps wherever I am, as long as I have pen and paper).

*Organizing* You may have some projects for which you have already collected notes and miscellaneous support materials, and you just need to sort through them and get them into a more structured form. In this case, your next action would likely be "Organize Project X notes." If you have to be in your office to do that (because that's where the files are, and you don't want to carry them around), that action should go on your "At Office" action list. If you're carrying the project notes around with you in a folder, or in a portable organizer or on a laptop, then the "Organize . . ." action would go on an "Anywhere" or "Misc." action list if you're going to do it by hand, or on "At Computer" if you're going to use a word processor, outliner, or project-planning software.

One of the greatest blocks to organizational productivity is the lack of decision by a senior person about the necessity of a meeting, and with whom, to move an important issue forward.

*Setting Up Meetings* Often, progress will be made on project thinking when you set up a meeting with the people you'd like to have involved in the brainstorming. That usually means sending an e-mail to the whole group or to an assistant to get it calendared, or making a phone call to the first person to nail down a time.

*Gathering Information* Sometimes the next task on project thinking is to gather more data. Maybe you need to talk to someone to get his or her input ("Call Bill re his thoughts on the managers' meeting"). Or

you need to look through the files you just inherited from last year's conference ("Review Associate Conference archive files"). Or you want to surf the Web to get a sense of what's happening "out there" on a new topic you're exploring ("R&D search firms for sales executives").

### **Random Project Thinking**

Don't lose any ideas about projects that could potentially be useful. Many times you'll think of something you don't want to forget when you're at a place that has nothing to do with the project. You're driving to the store, for example, and you think of a great way that you might want to start off the next staff meeting. Or you're stirring the spaghetti sauce in the kitchen and it occurs to you that you might want to give out nice tote bags to participants in the upcoming conference. Or you're watching the evening news when you suddenly remember another key person you might want to include in the advisory council you're putting together.

If these aren't specifically next actions that can go directly on your action lists, you'll still need to capture and organize them somewhere that makes sense. Of course the most critical tools for ensuring that nothing gets lost is your collection system—your in-basket, pad, and paper (or equivalents) at work and at home, and in a portable version (an index card) while you're out and about. You need to hold all your ideas until you later decide what to do with them.

## **Tools and Structures That Support Project Thinking**

No matter at what level project ideas show up, it's great to have good tools always close at hand for capturing them as they occur. Once they've been captured, it's useful to have access to them whenever you need to refer to them.

## Thinking Tools

One of the great secrets to getting ideas and increasing your productivity is utilizing the function-follows-form phenomenon—great tools can trigger good thinking. (I've come up with some of my most productive thoughts when playing with my Palm organizer in an airport, waiting for a flight!)

*Luck affects everything. Let your hook always be cast; in the stream where you least expect it there will be a fish.*

If you aren't writing anything down, it's extremely difficult to stay focused on anything for more than a few minutes, especially if you're by yourself. But when you utilize physical tools to keep your thinking anchored, you can stay engaged constructively for hours.

## Writing Instruments

Keep good writing tools around all the time so you never have any unconscious resistance to thinking due to not having anything to capture it with. If I don't have something to write with, I can sense that I'm not as comfortable letting myself think about projects and situations.

Function often follows form. Give yourself a context for capturing thoughts, and thoughts will occur that you don't yet know you have.

Conversely, I have done some great thinking and planning at times just because I wanted to use my nice-looking, smooth-writing ballpoint pen! You may not be inspired by cool gear like I am, but if you are, do yourself a favor and invest in quality writing tools.

I also suggest that you keep nice ballpoint pens at the stations where you're likely to want to take notes—particularly near the phones around your house.

## Paper and Pads

In addition to writing tools, you should always have functional pads of paper close at hand. Legal pads work well because you can easily tear off pages with ideas and notes and toss them into your in-basket until you get a chance to process them. Also you will often want to keep some of your informal mind-maps, and you can put those separate pieces of paper in appropriate file folders without having to rewrite them.

Where is your  
closest pad? Keep it  
closer.

## Easels and Whiteboards

If you have room for them, whiteboards and/or easel pads are very functional thinking tools to use from time to time. They give you plenty of space on which to jot down ideas, and it can be useful to keep them up in front of you for while, as you incubate on a topic. Whiteboards are great to have on a *How do I know* wall in your office and in meeting rooms, and the *what I think, until* bigger the better. If you have children, I recommend *I hear what I say?* that you install one in their bedrooms (I wish I'd—*E. M. Forster* grown up with the encouragement to have as many ideas as I could!). Be sure to keep plenty of fresh markers on hand; it's frustrating to want to start writing on a whiteboard and find that all the markers are dry and useless.

Whenever two or more people are gathered for a meeting, someone should start writing somewhere where the other(s) can see. Even if you erase your thoughts after a few minutes, just the act of writing them down facilitates a constructive thinking process like nothing else. (I've found it immensely helpful at times to draw informal diagrams and notes on paper tablecloths, place mats, or even napkins in restaurants, if I didn't have my own pad of paper at hand.)

## The Computer

Many times I like to think on my laptop, in my word processor. There are so many things I might want to do later on with my thinking, and it feels terrific to already have it in some digital form for later editing and cutting and pasting into various other applications. Once I've booted up and the screen is ready in front of me, I find that thinking just automatically starts to happen. This is another good reason to ensure that your typing and keyboard skills are sufficient to make engaging with the computer at least easy, if not downright fun.

## The Support Structures

In addition to good tools ubiquitously at hand, it is productive to have accessible formats into which project thinking can be captured. Much as a pen and paper in front of you supports brainstorming, having good tools and places for organizing project details facilitates the more linear planning that many projects need.

### Create File Folders or Loose-Leaf Pages as Needed

A good general-reference filing system, right at hand and easy to use, is not only critical to manage the general workflow process, but highly functional for project thinking as well. Often a project begins to emerge when it's triggered by relevant data, notes, and miscellaneous materials, and for this reason, you'll want to create a folder for a topic as soon as you have something to put in it. If your filing system is too formal (or nonexistent), you'll probably miss many opportunities to generate a project focus sufficiently early. As soon as you return from that first meeting with your initial notes about a topic that has just emerged on the horizon, create a file and store them in it right away (after you have gleaned any next actions, of course).

Many times, in coaching clients, I find that the mere act of

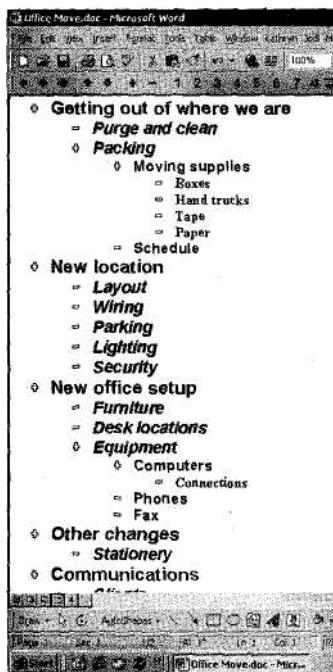
creating a file for a topic into which we can organize random notes and potentially relevant materials gives them a significantly improved sense of control. It's a way of physically, visibly, and psychologically getting their "arms around it."

If you like to work with a loose-leaf notebook or planner, it's good to keep an inventory of fresh note paper or graph paper that you can use to set up a page system for on a theme or project as it shows up. While some projects may later deserve a whole tabbed section or even an entire notebook of their own, they don't start out that way. And most of your projects may need only a page or two to hold the few ideas you need to track.

## Software Tools

Software is in one sense a dark black hole to explore in search of good "project management" tools. For the most part, the applications that are specifically designed for project organizing are way too complex, with too much horsepower to really be functional for 98 percent of what most people need to manage. They're appropriate only for the very small percentage of the professional world that actually needs them. The rest of us usually find bits and pieces of applications more informal and project-friendly. As I've noted, I have never seen any two projects that needed the same amount of detailing and structure to get them under control. So it would be difficult to create any one application that would suffice for the majority.

*Digital Outlining* Most of what anyone needs to structure his or her thinking about projects can be found in any kind of application that has a simple hierarchical outlining function. I used to use a Symantec program called Grandview, and now I often use Microsoft Word for just this kind of project planning. Here's a piece of an outline I created for one of our own planning sessions:



The great thing about outlining applications is that they can be as complex or as simple as required. There are numerous software programs that provide this kind of basic hierarchical structuring. The trick is to find one that you feel comfortable with, so you can rapidly get familiar with how to insert headings and sub-headings and move them around as needed. Until you can stop focusing on how to use the program, you'll resist booting it up and using it to think and organize.

It doesn't really matter where you put this kind of thinking, so long as it's easily accessible so you can input and review it as needed.

*Brainstorming Applications* Several applications have been developed specifically to facilitate the brainstorming process. "Inspiration" was one, based on the mind-mapping techniques of

Tony Buzan. It had some useful features, but me, I've gone back to paper and cool pen for the kind of rapid, informal thinking I usually need to do.

The problem with digitizing brainstorming is that for the most part we don't need to save what we brainstorm in the *way* we brainstormed it—the critical thing is the conclusions we develop

from that raw thinking. The slick brainstorming-capture tools, like electronic whiteboards and digital handwriting-copying gear, ultimately will probably not be as successful as the manufacturers hoped. We don't need to save creative thinking so much as we do the structures we generate from it. There are significant differences among collecting and processing and organizing, and different tools are usually required for them. You might as well dump ideas into a word processor.

*Project-Planning Applications* As I've mentioned, most project-planning software is too rigorous for the majority of the project thinking and planning we need to do. Over the years I've seen these programs more often tried and discontinued than utilized as a consistent tool. When they're used successfully, they're usually highly customized to fit very specific requirements for the company or the industry.

I anticipate that less structured and more functional applications will emerge in the coming years, based on the ways we naturally think and plan. Until then, best stick with some good and simple outliner.

### Attaching Digital Notes

If you are using a digital organizer, much of the project planning you need to capture outside your head can in fact be satisfactorily managed in an attached note field. If you have the project itself as an item on a list on a Palm, or as a task in Microsoft Outlook, you can open the accompanying "Note" section and jot ideas, bullet points, and subcomponents of the project. Just ensure that you review the attachment appropriately to make it useful.

## How Do I Apply All This in My World?

Clear the deck, create a context, and do some creative project thinking. You'll then be way ahead of most people.

Just as your "Next Actions" lists need to be up-to-date, so, too, does your "Projects" list. That done, give yourself a block of time, ideally between one and three hours, to handle as much of the "vertical" thinking about each project as you can.

At the very least, right now or as soon as possible, take those few of your projects that you have the most attention on or interest in right now and do some thinking and collecting and organizing on them, using whatever tools seem most appropriate.

Focus on each one, one at a time, top to bottom. As you do, ask yourself, "What about this do I want to know, capture, or remember?"

You may just want to mind-map some thoughts on a piece of paper, make a file, and toss the paper into it. You may come up with some simple bullet-point headings to attach as a "note" in your software organizer. Or you could create a Word file and start an outline on it.

*Let our advance  
worrying become  
advance thinking  
and planning.*

—  
*Winston*

The key is to get comfortable with having and using your ideas. And to acquire the habit of focusing your energy constructively, on intended outcomes and open loops, before you have to.