



Practical Planning Checklist

Analyze your personal planning practices using the self-assessment test below. Answer in terms of how you normally behave, now how you know you should behave.

| Yes | No | Sometimes | Question |
|-----|----|-----------|--|
| | | | 1. Do you regularly analyze the kinds of work you face? (Do you break it into categories, priorities?) |
| | | | 2. Do you think in terms of goals - end results, not activities needed to reach that end result? Leave activity types of decisions until later, perhaps to delegate? |
| | | | 3. Do you write out on paper your goals? |
| | | | 4. Do you decide what can be delegated and then delegate it? |
| | | | 5. Do you stay flexible during the week, always having alternative plans for "what if" situations? |
| | | | 6. Do you consider other people (before/during/after) while planning so as to consider their time, priorities, workload, as you turn to them for assistance? |
| | | | 7. Do you have an effective reminder system to keep you current on known deadlines (i.e. a suspense file, a tickler file, a pull-up file)? |
| | | | 8. Do you set realistic deadlines for every request and project that leaves your desk? |
| | | | 9. Do you group similar activities while you plan your week and block out times to do them (i.e. phoning, meetings, correspondence, and paperwork)? |
| | | | 10. Do you set a time for regular planning sessions (for yourself) as you organize your week? |

Use this checklist to target areas where you are strong or need to improve. The following scale was developed after observing over 5000 managers' responses to these questions.

| YES Answers | Explanation |
|-------------|--|
| 9 – 10 | Excellent - You are very thorough. You'd be a good coach to other people. |
| 7 – 8 | Very Good - Focus on those areas you're not consistent in and try to improve. |
| 5 – 6 | Average - Most managers score in this range. |
| > 4 | Below Average - Identify an area to start in, but start! |