Upgrade Your Work Plans for Better Performance – 16103

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ABSTRACT

Most work plans involve at least two basic pieces: a list of things to do and a timeline for doing them. These “tasks-and-times” plans can be used for managing a project, an organizational change, or the implementation of a strategic objective. But given the high rate of plan failures – often cited as ranging from 35% to over 80% – something must be missing.

Three ideas for upgrading work plans have demonstrated higher success rates than the time-and-task method alone. *First*, maintain a “GPS Scorecard” of the Goals, Performance metrics, and Schedules for accomplishment. *Second*, maintain a Performance Circle Register of all key players, and the key deliverables to and from each of them, that will ensure success. *Third*, implement all three parts of an accountability management system, collectively referred to as “T3”: Tracking, Team assignments, and Talk-times to update status and progress against the plan.

Why bother to take the extra steps to strengthen work plans? There are three reasons: (a) Because traveling without a map is risky in times of high change in infrastructure, staffing, and technology; (b) Because “expectations” do not guarantee delivery as reliably as well-defined agreements; and (c) Because “accountability” is a management practice, not a personality trait.

Together, implementing these three ideas can provide for clarity of purpose, guidance in establishing the productive relationships necessary for success, and a system of supporting accountability for all participants, both on the team and with others inside and outside of the organization.

CLARITY OF PURPOSE: THE GPS SCOREBOARD

It is easy to forget the importance of refreshing the sense of purpose and direction for a team of human beings. In fact, some managers assume that people “should know their jobs”, leaving it to individual participants to figure out the intended outcomes and timelines, or to remember them after a one-time statement at a kickoff meeting. A good scoreboard goes a long way to giving people ongoing access to re-contextualizing their work as needed. The GPS scoreboard includes statements of:

- Goals to accomplish,
- Performance metrics for success, and
- Schedules for the due dates of goal milestones, deliverables, and results.

Goal Clarity

Too often the statement of a team’s goal is neither posted in a location accessible to team members nor updated to reflect changes in knowledge or direction. Knowing where we are going is vital for cohesion, coordination, and building momentum – as well as for recovering momentum when it fades due to barriers or external changes in project requirements. The GPS scoreboard keeps a goal statement visible for every avenue of work that is being managed.

Performance Clarity

Performance is a much-used word that means too many things: objective measures, personal criteria, and even "expectations", i.e., the unspoken but presumed and hoped-for actions or results to be produced by another person. Good measures of success on a GPS scoreboard are useful because they can be updated daily or weekly to make the status of people's work observable in real time. Team members with a goal-relevant scoreboard will be able to see progress and setbacks as they work on their part of the project or change implementation.

Ideally, performance metrics are developed in tandem with the work of clarifying the goal statement. The language used for the goal is influenced by decisions on which measures of success are most appropriate, and vice versa. Knowing, for example, whether success will be measured as process productivity or efficiency puts attention on ratios of inputs to outputs. Or, if success is to be measured in output quantity or quality, attention goes toward refining operations to optimize products and services as desired. Or, if success is measured as effectiveness, the focus shifts to establishing relationships with user-customers to obtain feedback on the value and impact of team efforts.

Performance measures, whether of efficiency, quality, or effectiveness, all require attention to the deliverables moving to and from the team. Deliverables are the products, services, and communications that are sent from one person or group to another. This idea of performance also shifts attention, this time from "doing" to "delivering", and it increases awareness of connectivity to the world outside the team.

Schedule Clarity

Some managers believe that a one-time statement of the deadline will be permanently embedded in the team member's brains. These may be the same managers who wonder why their projects and change implementations miss the intended deadlines. But daily activity in the workplace – including outdated procedures, missed communications, and too many interruptions – can sweep away the attention to scheduled targets. Further, those same issues also tend to provide handy excuses and justifications for why targets cannot be met.

A clear schedule of the critical deliverables and results required to meet goal milestones will assist all participants in truing themselves up to the realities of time and contingencies. Adding that schedule to the GPS scoreboard strengthens the opportunities for goal success.

A PERFORMANCE CIRCLE OF PRODUCTIVE RELATIONSHIPS

If keeping goals, performance metrics, and schedules up to date is often neglected by managers, there is another element in work planning that is sometimes left to assumptions or overlooked altogether: who must we interact with to achieve the goal? The second idea for upgrading work plans is to identify the necessary set of key players – the individuals, departments, and organizations – that will play a role in goal success. Once identified, the team can establish a relationship with each key player, make that relationship a productive one, and manage the performance of the relationship to meet the targets defined by the GPS scoreboard.

Connections: Identify the Key Player CRABs

The relationships required for success in any project or change implementation are best identified in advance, as part of the planning process. Who are all the other people and groups the team will send things to – and receive things from – in order to reach the targeted measures and timelines? Some key players operate in other silos, other geographic locations, and/or report to external organizations, but will be sending vital input and/or receiving goal-relevant output from the team.

How do we find out who these key players are? One acronym that gives guidance is amusing, and not meant to be unfriendly: CRABs are the Collaborators, Resource providers, Authorities, and Beneficiaries associated with any goal's success.

- *Collaborators* – To develop a reliable list may require team discussion to identify the people and groups who could make an important contribution, even if only in emergencies or for small parts of a project.
- *Resource providers* – These are often the easiest to define: managers and team members can confer to develop ideas on what is needed to reach the goal and who can provide it.
- *Authorities* – It takes some thought, but is not difficult to identify the people and offices needed to give necessary approvals, signatures, and reviews for team activities and deliverables.
- *Beneficiaries* – These people can take more discussion to identify, as they include user-customers as well as other stakeholders who will want to be informed or consulted as work progresses.

Advance planning to identify key players gives team members the opportunity to define the reach and scope of a project or change implementation. It also reduces the surprise of recognizing needed connections only after it is too late to make a request or schedule a collaboration while keeping the work on schedule.

Note: Not everyone who cares about a project or a change implementation qualifies as a "key player CRAB". Some people have influence, or are well liked by team members, but they do not have a direct interactions or require deliverable agreements with the team. CRABs are key players who deliver things to the team – or expect things delivered to them by the team – that are critical to reaching the stated goals. Not everyone qualifies.

The Performance Circle of Senders and Receivers

Every goal can be said to have a "performance circle", which may be envisioned as a hub-and-spoke diagram with the team in the center and the various CRABs arrayed around the outside. The "spokes" that connect the team and the CRABs represent agreements for whatever products, services, and communications must move between them for goal success. Does the team need certain types of resources to produce the results? Will permissions, approvals, or audits be necessary? Do the people who will be directly affected by the project need information, education, or support for their engagement? Those are the key connections in the team's "performance circle".

Each relationship, represented by a line or spoke between a goal's team and each of its CRABs, will be a relationship of Sender-Receiver. A Sender may be a team member sending a communication to a CRAB receiver, and a CRAB may be providing a service or shipping a product to a team receiver. A sample Performance Circle is shown in Diagram I.

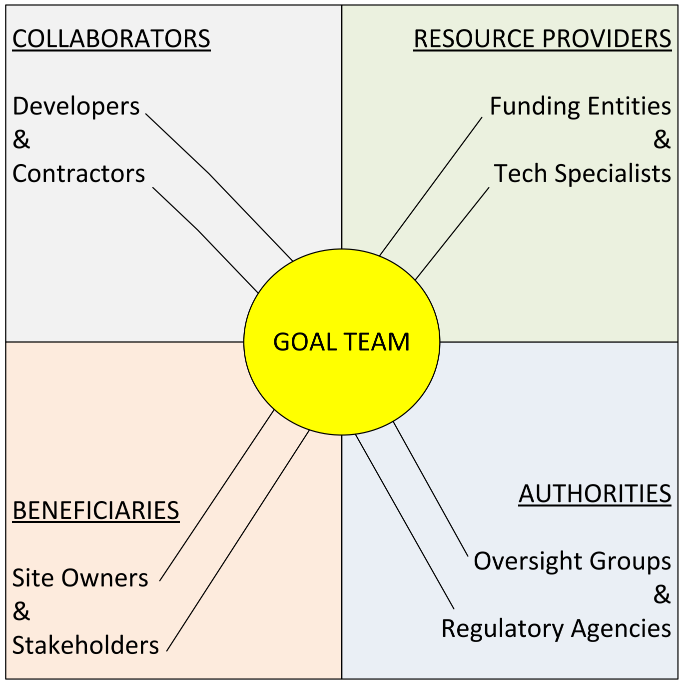

DIAGRAM I. Sample Performance Circle

Relationship Performance

Each relationship is a two-way link defined by one or more agreements specifying what and when the necessary products, services, and communications will be sent and received to support goal success. Clear agreements for deliverables set the foundation for the performance of the relationship:

- Is the content of the product or service well-defined?
- Do both parties agree on the timelines for delivery?
- Is there an obvious way to know if the terms of agreement are met?
- Does the agreement include options and/or schedules for providing feedback?

In some cases, the team's relationship with a CRAB is already well established and needs only to be updated for a new or revised project. In the cases where an existing or former relationship has to be re-established, or a new one created, establishing the relationship requires more attention. It is useful to open communication by stating the project goals and requesting a time to discuss collaboration. Sharing the team's GPS scoreboard can create a context for discussion to get specific about the appropriate deliverables.

The performance of each relationship can be determined by developing the specifics for each type of goal-relevant deliverable – product, service, and/or communication – as to its content, due date(s), and clear measure of success or acceptability. This takes time and may involve several team members as well as other key players.

Once the “expectations” for deliverables between the team and its CRABs have been translated into performance agreements for delivery, the actual work begins, which is the business of managing and fulfilling the performance agreements between the Performance Circle’s senders and receivers to achieve goal success. A sample Performance Circle with the names of key agreements is shown in Diagram II.

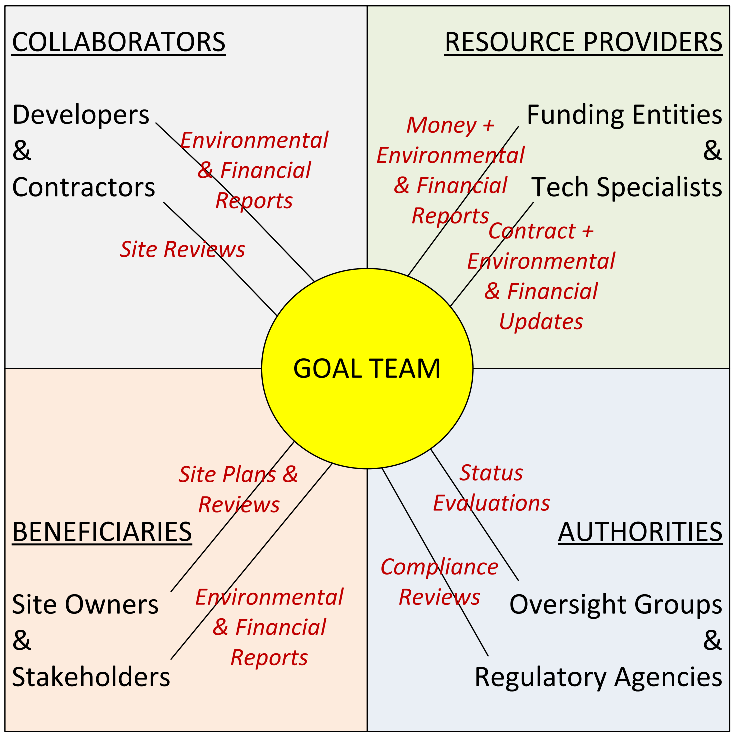

DIAGRAM II. Sample Performance Circle with Working Links

The Performance Circle Register

Turning the Performance Circle into a scoreboard entails re-casting it as a register of the status of agreements: a Performance Circle Register. Some managers skip the diagram phase of this process and go directly to the Register; others appreciate the value of the hub-and-spoke diagram as a visual support for team discussion and development of performance relationship specifics. In any case, the Performance Circle Register is the tool for managing the performance of the relationships necessary for goal success, as shown in Table I.

TABLE I. Sample Performance Circle Register

Key Player	Delivery Agreements	Communication Agreements	Agreement Status
Developer A	Enviro. & Fin. Reports	EOM	Next: Mar. 31
Contractor X	Site reviews	Weekly visits & meetings	Skill upgrade on R-17 being scheduled
Funding Entity M	$$$ + Enviro. & Fin. Reports from team	Monthly Skypes	Next: Apr. 4
Tech II	Contract + Enviro. & Fin. Reports from team	On-site reviews & weekly meetings	Next: Mar. 16
Oversight I-9	Status Evaluations	Monthly calls	Next: Mar. 22
Regulator 17	Compliance Review	Form 6673 updates	Current
Site Owner	Site plan reviews	Weekly visits & meetings	Updating plan for next meeting
Stakeholder G	Enviro. & Fin. Reports	EOM	Next: Mar. 31

The Performance Circle Register is a useful part of a work plan because it defines the work to be done and makes the team's job clear: to develop, manage, and fulfill the agreements between the team and the key player CRABs:

1. Identify and establish a foundation for productive relationships with each CRAB by confirming a mutual understanding of the goal, performance, and timelines;
2. Establish agreements regarding the sender and receiver of all goal-necessary products, services, and communications, delivery and feedback schedules, and measures for success; and
3. Manage those agreements to ensure delivery performance happens accordance with those agreements. *Note*: The team takes responsibility for this management step, including for team deliveries as well as for receiving promised deliverables from others on schedule.

Does developing and managing a Performance Circle Register sound like too much bother? Most managers who have implemented this idea as part of their work plans report that it *is* worth the trouble to do the deep "goal-thinking" involved. Team members gain a visual reminder of the bigger picture of the goal and its critical environments and participants. There is also a reduction in delays and surprises ("I didn't think *they* needed to be consulted!") as well as improved coordination both within the team and with other invested parties.

The Performance Circle Register also helps team members to maintain an accurate and up-to-date list of key player CRABs as well as the status of agreed deliveries and communications. It is likely that this list will change as the project or change initiative moves forward, so keeping it accurate, complete, and up-to-date increases internal team efficiency.

One caution: if a manager notices that the Performance Circle Register, is becoming too complex, the goal may need to be broken out into sub-goals in order to keep accountabilities for agreements and deliverables more manageable. A separate GPS, Performance Circle Register, and work plan can be developed for each part of any meta-goal.

ACCOUNTABILITY MANAGEMENT: T3

The third and final idea for improving the effectiveness of a work plan, the system for creating and managing the accountability for goal agreements and success, is called "T3":

- *Tracking systems* to check status and progress;
- *Team assignments* for the work of developing, managing, and fulfilling agreements with CRABs; and
- *Talk-times* to regularly review and revise the status of both the GPS scoreboard and the Performance Circle Register, and also to update the work plan as needed.

Tracking Progress on GPS and the Performance Circle Register

Tracking is done by most, if not all, team members. Having good scoreboards for each goal – a GPS and a well-defined Performance Circle Register – is useful to keep progress and changes available and visible for everyone involved. A mechanism for status-tracking and a regular schedule for updates allows each team member to communicate – and help other team members accommodate – the status changes as appropriate. Tracking the updates and changes in real time supports better performance in all relationships and improves internal and external coordination.

Team Assignments

Team members may have different types of assignments, but the more clearly each assignment is spelled out, the more likely the work will be done on time and with appropriate relevance to goal accomplishment and collaboration with other participants. Any team member may have assignments for one or more of the following responsibilities:

a) Establish connections and agreements with key player CRABs in other offices, locations, or organizations;

b) Produce, deliver and/or or receive the specified products, services and/or communications in accordance with those agreements; and/or

c) Keep the status of the Goal, Performance Metrics, and Schedules (GPS) and the Performance Circle Register scoreboards accurate, complete, and up to date.

Every Team Member has clear accountabilities and assignments that are revised as needed. These assignments can constitute a third scoreboard, which most team members find useful because they can see clearly who else is accountable for certain portions of GPS and Performance Circle responsibilities. If this scoreboard is developed, it is worthwhile to keep it spelled out as deliverables rather than tasks. In other words, it identifies which team members are accountable for specific CRAB relationships and their performance, and which are responsible for specific deliverables, timelines, and measures tracking.

“But where are the tasks?” you may ask. Here’s a shocking fact: figuring out what people have to DO is not as important – or useful – as figuring out what they need to SEND and RECEIVE to and from other people. When people know what, and when, they have to deliver something, and who else is involved in the associated Performance Circle, they can create the path to getting it done on time. Some managers call this the “Outside-In” system of work planning, because instead of looking at the work “inside the box”, they focus on the key relationships, agreements, and deliverables that will accomplish the intended results.

Talk-Times for Status Review and Plan Updates

Talk is what happens in daily, weekly, or bi-weekly meetings where team members review the actual status of results against the plan’s GPS and Performance Circle Register.

- Is the GPS status going as planned? Check.
- Are the agreements in the Performance Circle Register either being established or already operating as agreed with each CRAB? Check.
- Are team member assignments being fulfilled as planned? Check.

If those scoreboards items are *not* on track, Talk-time will include a review of problems, difficulties, and surprises, and developing resolutions and/or assignments for each of them.

Using the scoreboards for the GPS, Performance Circle Register, and Team Assignments as the heart of your meeting agenda quickly makes meetings shorter as team members know what to expect and how to be well prepared. Some managers also maintain support devices such as “Issues Lists” or “Parking Lot Lists” to make sure that problems are not overlooked or forgotten.

The “Talk-time” idea for upgrading work plans also improves overall goal performance by standardizing the meeting time, the meeting agenda, and the review of agreements with CRABS and by team members. A standard agenda builds the habit of going directly to the point: review the GPS and the Performance Circle, and update the T3 whenever a change is needed in Tracking systems, Team assignments, or Talk-times and agendas.

Everybody loves to hate meetings, but they can be designed to help team members improve their own effectiveness and increase the odds of on-time goal success. Ideally, the meetings are at least once a week. They don’t have to be face-to-face, since technology has made it easy for people in distributed locations to see the scoreboards, update their status, and discuss progress and problems with other team members. Meetings can be both standardized and customized in a way that supports good workplace practices.

PUTTING IT ALL TOGETHER

Each of the three ideas for upgrading work plans will be best implemented by including the thinking and communication of all team members. Their input is useful to clarify the GPS, the Performance Circle Register, and the T3 Accountability Management system in a way that makes sense for the team’s work patterns. A few “rules of the road”, learned from experience with high-performing teams:

1. Make it visible. Scoreboards can be created by the team as a whole, and posted – either physically as a poster in a meeting room or electronically on a shared bulletin board. The intent is to allow each team member to update their own status metrics or notes on a regular basis, and to see what others are doing in real time wherever possible.
2. Manage the conversations. Teams that become infected with habitual complaints, e.g., about scarce resources, lack of "leadership", or the requirements for "paperwork", can be undermining their own effectiveness. Pay attention to the frequency of negative conversations and work with team members to track down the sources and/or develop solutions.
3. Know what *not* to do. If you are not a Human Resources specialist, don't try to be one: you'll be better off having HR on speed-dial than trying to perform their duties. Bring in the experts to resolve sticky conflicts, deal with emotional behavior, or improve job skills. The same is true of money issues: if you aren't a Financial Management specialist, then get assistance with budget planning and salary decisions. Technology is another area where some managers want to be specialists, but are not up to speed on new systems, apps, or equipment. Managers cannot be all things to all people, and being a "manager" does not mean doing everything involved in accomplishing a goal. Being a manager means managing the network of agreements that is required for goal accomplishment. Be a manager, not a jack-of-all-trades.

Using GPS and Performance Circle scoreboards supports team members in being more successful in their work. Managing the accomplishment of a complex goal requires managing delivery performance in a network of relationships, including those within the team. Accountability is a management practice that can be developed and strengthened and improved over time. Upgrading your work plans to support team members in working effectively pays dividends in better performance all around.