

LeaderPerfect Newsletter

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The Triple-A Formula For Effective Planning

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Recently I've been leading several groups — profit and non-profit alike — through strategic planning processes. In setting the parameters for our work, I often introduce them to what I call the Triple-A formula for planning and executing the plan.

The Triple-A formula derives its name from the words "aspiration," "action," and "assessment."

- *Aspiration* has to do with dreaming and creating vision
- *Action*, as its name implies, involves translating aspirations into plans, then implementing them.
- *Assessment* entails evaluation. First, evaluating our dreams and prioritizing them. Then critiquing our plans (once they've been developed) to make them as good as possible. Then periodically assessing our effectiveness at implementing our plans.

Maintaining Discrete Focus

I am increasingly impressed with the importance of maintaining a discrete, segregated focus on each of these three: aspiration, action, and assessment. One of the most common mistakes in meetings designed for strategic or long-range thinking is mixing all three elements together, like a tossed salad.

It plays out something like this. Someone pitches out a broad description of a possible future, a move toward building aspiration. Immediately another person points out the obstacles that make the idea rather unworkable. This turns the conversation from aspiration to assessment.. Someone else chimes in with suggestions on how to get around those obstacles, moving the focus toward action planning. Quickly, however, another voice starts listing factors that make these proposed solutions inadequate, pushing action planning aside for another round of assessment.

Back and forth it goes, bouncing from dreaming to critiquing to problem-solving to more critiquing. At the end of the day everyone is thoroughly exhausted and perhaps a wee bit frustrated that so little of substance was accomplished. Sound familiar?

No Co-Mingling

A far sounder approach is to steadfastly resist the effort to co-mingle dreaming, problem-solving, and critique. And that's where the Triple-A Formula becomes a handy guide. As we convene a meeting (or a specific session in a lengthy planning retreat), we need to be clear on our immediate purpose. Is this meeting or session for building aspiration?

For laying out a plan of action? For making assessments of our vision, our plans, or our execution?

Once we've identified the purpose of the meeting, it's the facilitator's duty to hold the meeting to its purpose. There is a time for dreaming, a time for action, and a time for critique. But they are not one and the same time.

More and more often I go into these types of meetings with several stacks of post-it notes about the size of index cards. I distribute them freely around the room. They provide a convenient means to capture great insights that happen to be outside the parameters of the present meeting.

For instance, our meeting may be focused on aspiration. Someone shares a particularly invigorating vision. Another person immediately says, "You know, that's a great idea. And here's a way we could go about doing that." Now, no matter how sound or brilliant this second comment may be, pursuing it at this moment would move us away from aspiration-building. So I say, "That's a good suggestion. Let's be sure we don't lose it. Write that down on a post-it note so we can remind ourselves to revisit it when we move into our sessions for action planning."

In a one or two-day retreat setting, I'll often designate a place in the room for posting these reminders. Reminders related to aspiration are collected in one place, those for action in another, and suggestions for critique in still another. I invite people to scan those reminders occasionally during breaks. And if they come up with additional ideas during their scan, I encourage them to post their ideas in the appropriate grouping.

Letting Each Domain Flourish

By treating aspiration, action, and assessment discreetly, we elevate the efficiency of the meeting. In addition, we take advantage of the way nature has wired us so that we optimize results.

Aspiration, action, and assessment each radiate from different portions of our inner being. They fire off different parts of the brain, different aspects of our neurology.

- *Aspiration*, with its emphasis on envisioning, dreaming, becoming inspired, and building personal motivation, comes from that part of our inner world called the affective domain.
- *Action* involves skills such as planning, designing, and executing. These activities are largely conative in nature. ("Conative," from the Latin word *natus* for "birth," is not an everyday term. Think of it as those habits and skills that you've mastered so thoroughly that they are seemingly "native" to you.)
- *Assessment* is a function of the cognitive domain, i.e., the thinking, critiquing, analyzing side of our being.

Given the way we are wired, the affective, conative, and cognitive domains cannot be equally engaged at the same moment. To the degree we are critiquing we are not dreaming. To the degree we are taking action we are not making reflective, disengaged assessments.

Thus, when a meeting moves back and forth indiscriminately from dreaming to critiquing to planning, no one domain ever maximizes its contribution. It doesn't have an opportunity to flourish. About the time it becomes fully energized, the discussion turns away from what it has to offer.

To allow each domain to contribute fully, learn the discipline of focus. When it's time to build aspiration, work solely on that outcome. When it's time for planning or implementing, reserve further discussion of dreams and vision for an appropriate time. When it's time for critique, devote the time purely to assessment.

But what happens when you identify problems in the course of a critique? According to the Triple-A formula, you set aside a specific time or setting (after the critique is finished) for envisioning a "fix" to these problems. In other words, you create an "aspiration" session to brain-storm solutions to the problem. Then you move into an "action" session to implement those fixes. Avoid the temptation to intermix critique with finding solutions.

By maintaining this kind of singular focus on each element of the Triple-A formula, you'll be amazed at how much your leadership effectiveness grows in the months ahead. And in time, you'll be spending far less time in meetings, because each one accomplishes so much more in a shorter period.

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