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planning lecture-4

Principle of Management

MGM₁₁₁

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planning



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☐ Meaning

☐ Definition

☐ Nature

☐ Scope

☐ Importance

☐ Process

Learning Outcomes



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- managers plan.
- types of plans do managers use.
- useful planning tools and techniques.
- control process.

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Before You Plan



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☐ MISSION STATEMENT

- *what we do; purpose of organization*

☐ VISION STATEMENT

- *how we want it to be; future state of organization*

☐ VALUES

- *what do we stand for; culture framework*

☐ PRIMARY OBJECTIVES

- *how to get there; translated into goals and action plans*



Why Should We Plan?

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To set the organization up for positive outcomes such as:

- Better leadership—more cohesive team
- A clear picture of trends which may impact the organization now and in the future
- A clearly defined mission, vision, and strategy
- Identification of short- and long-term “attention” areas
- Specific plans to improve performance
- Consistent, sustained success, as opposed to marginal success

To directly address issues/threats such as:

- Decreased membership
- Unhappy members (retention)
- Competitive threats
- Financial instability
- Succession planning



Why Plan?



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- ❖ Want to plan change, not become a victim of change
- ❖ planning is an effort to anticipate future change
- ❖ Gives the organization a sense of direction
- ❖ Involve staff in decision making
- ❖ Helps coordinate the different functions and departments
- ❖ Facilitate control and demonstrate accountability



Factors in Planning



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- Time frame
- Collecting and analyzing data
- Levels of planning in the organizational structure
- Flexibility
- Accountability



Types of Plans



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- ☐ Overall strategic plan
- ☐ Annual budget/operations plan
- ☐ Collection development plan
- ☐ Information technology plan
- ☐ Development (fund raising) plan
- ☐ Staff development (training) plan
- ☐ Marketing plan
- ☐ Building / facilities plan
- ☐ Instructional plan
- ☐ Evaluation or outcomes assessment plan



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managers plan

➤ Planning

- The process of setting objectives and determining how to best accomplish them.

➤ Objectives

- Identify the specific results or desired outcomes that one intends to achieve.

➤ Plan

- A statement of action steps to be taken in order to accomplish the objectives.



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managers plan



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➤ Steps in the planning process:

- ☐ Define your objectives.
- ☐ Determine where you stand vis-à-vis objectives.
- ☐ Develop premises regarding future conditions.
- ☐ Analyze and choose among action alternatives.
- ☐ Implement the plan and evaluate results.



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The roles of planning and controlling in the management process.

Planning—to
set the direction

- Decide where you want to go
- Decide how to best go about it

Organizing—
to create structures

Leading—
to inspire effort

Controlling—
to ensure results

- Measure performance
- Take corrective action

managers plan

➤ Benefits of planning:

- ☐ Improves focus and flexibility.
- ☐ Improves action orientation.
- ☐ Improves coordination.
- ☐ Improves time management.
- ☐ Improves control.



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What types of plans do managers use?

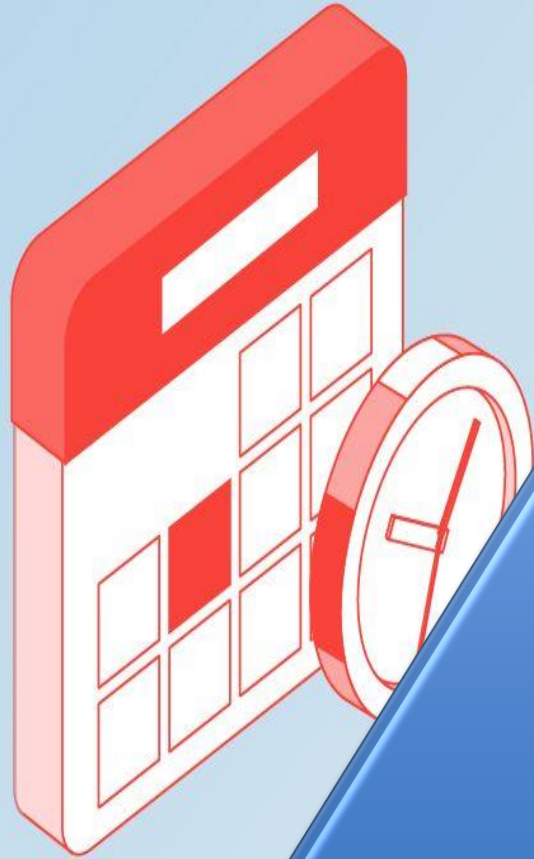
- **Short-range and long-range plans:**
 - ❑ Short-range plans = 1 year or less
 - ❑ Intermediate-range plans = 1 to 2 years
 - ❑ Long-range plans = 3 or more years
- **People vary in their capability to deal effectively with different time horizons.**
- **Higher management levels focus on longer time horizons.**



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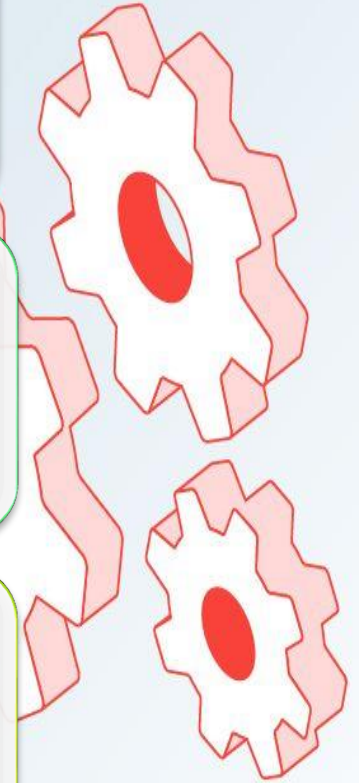
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**Long-range plans
= 3 or more years**

**Intermediate-range
plans = 1 to 2 years**

**Short-range plans = 1
year or less**



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What types of plans do managers use?

➤ Strategic and operational plans

- ☐ Strategic plans — set broad, comprehensive, and longer-term action directions for the entire organization.
- ☐ Operational plans — define what needs to be done in specific areas to implement strategic plans.
 - ☐ Production plans
 - ☐ Financial plans
 - ☐ Facilities plans
 - ☐ Marketing plans
 - ☐ Human resource plans



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What types of plans do managers use?



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➤ Policies and procedures

☐ Standing plans

- ☐ Policies and procedures that are designed for repeated use.

☐ Policy

- ☐ Broad guidelines for making decisions and taking action in specific circumstances.

☐ Rules or procedures

- ☐ Plans that describe exactly what actions are to be taken in specific situations.

What types of plans do managers use?

➤ Budgets and project schedules

☐ Single-use plans

- ☐ Only used once to meet the needs and objectives of a well-defined situation in a timely manner.

☐ Budgets

- ☐ Single-use plans that commit resources to activities, projects, or programs.
- ☐ Fixed, flexible, and zero-based budgets.

☐ Projects

- ☐ One-time activities that have clear beginning and end points.
- ☐ Project management and project schedules.



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useful planning tools and techniques?



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1- Forecasting

2- Contingency planning

3- Scenario planning

4- Benchmarking

5- Use of staff planners

useful planning tools and techniques?

➤ Forecasting

- ☐ Making assumptions about what will happen in the future.
- ☐ Qualitative forecasting uses expert opinions.
- ☐ Quantitative forecasting uses mathematical and statistical analysis.
- ☐ All forecasts rely on human judgment.
- ☐ Planning involves deciding on how to deal with the implications of a forecast.



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useful planning tools and techniques?



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➤ Contingency planning

- ❑ Identifying alternative courses of action that can be implemented to meet the needs of changing circumstances.
- ❑ Contingency plans anticipate changing conditions.
- ❑ Contingency plans contain trigger points.



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useful planning tools and techniques?



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➤ Scenario planning

- ☐ A long-term version of contingency planning.
- ☐ Identifying alternative future scenarios.
- ☐ Plans made for each future scenario.
- ☐ Increases organization's flexibility and preparation for future shocks.



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useful planning tools and techniques?



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➤ Benchmarking

- Use of external comparisons to better evaluate current performance and identify possible actions for the future.
- Adopting best practices of other organizations that achieve superior performance.



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useful planning tools and techniques?



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➤ Use of staff planners

- ☐ Coordinating the planning function for the total organization or one of its major components.
- ☐ Possible communication gaps between staff planners and line management.



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STRATEGIC PLANNING



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“If you don’t know where you’re going, any road will get you there?”

“If you don’t know where you’re going, how will you know when you get there?”

Strategic planning solves these problems.



control process



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➤ Controlling

- ❑ The process of measuring performance and taking action to ensure desired results.
- ❑ Has a positive and necessary role in the management process.
- ❑ Ensures that the right things happen, in the right way, at the right time.
- ❑ Organizational learning and after-action review.



control process



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➤ Steps in the control process:

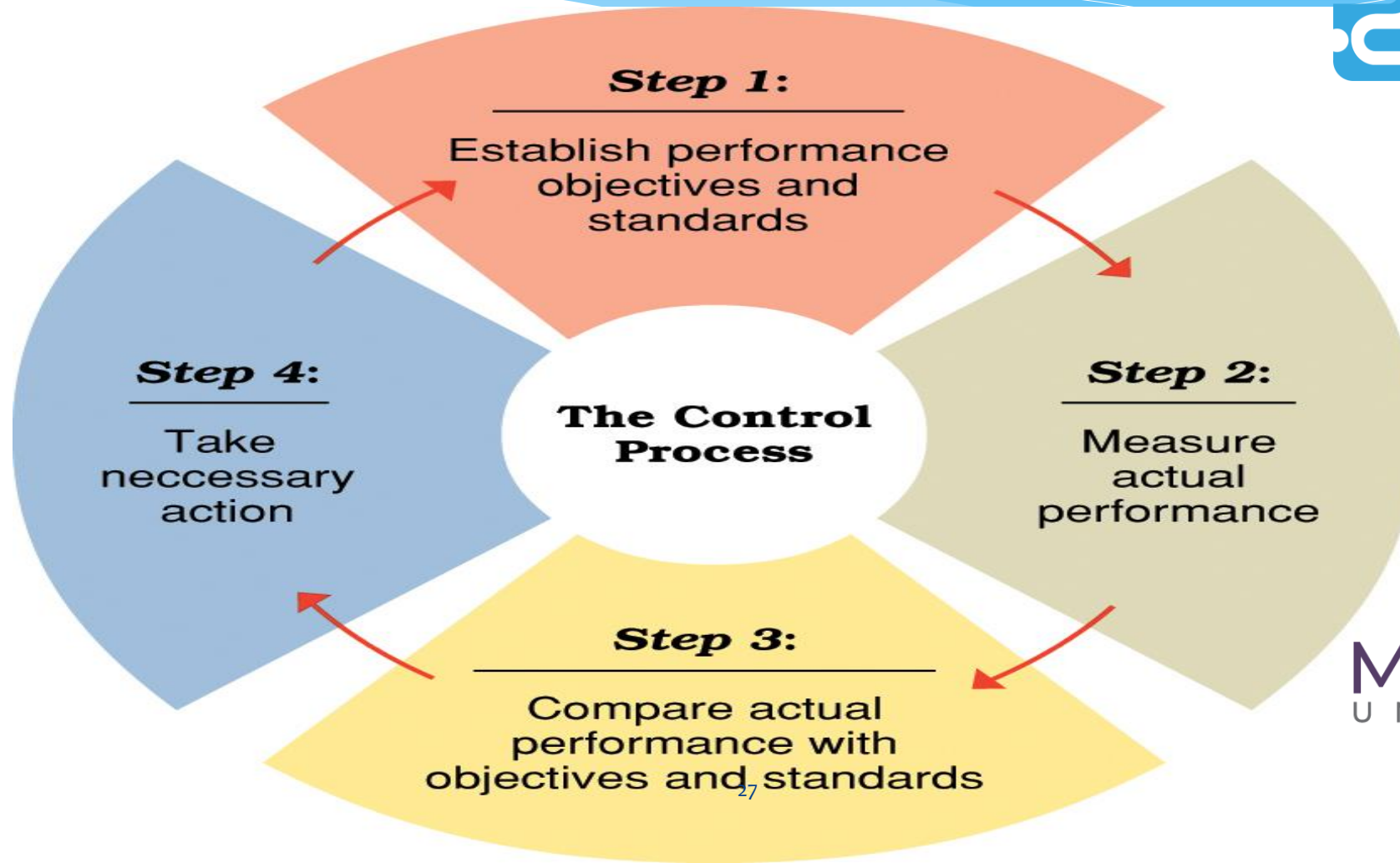
- ☐ Step 1 — establish objectives and standards.
- ☐ Step 2 — measure actual performance.
- ☐ Step 3 — compare results with objectives and standards.
- ☐ Step 4 — take corrective action as needed.



Four steps in the control process



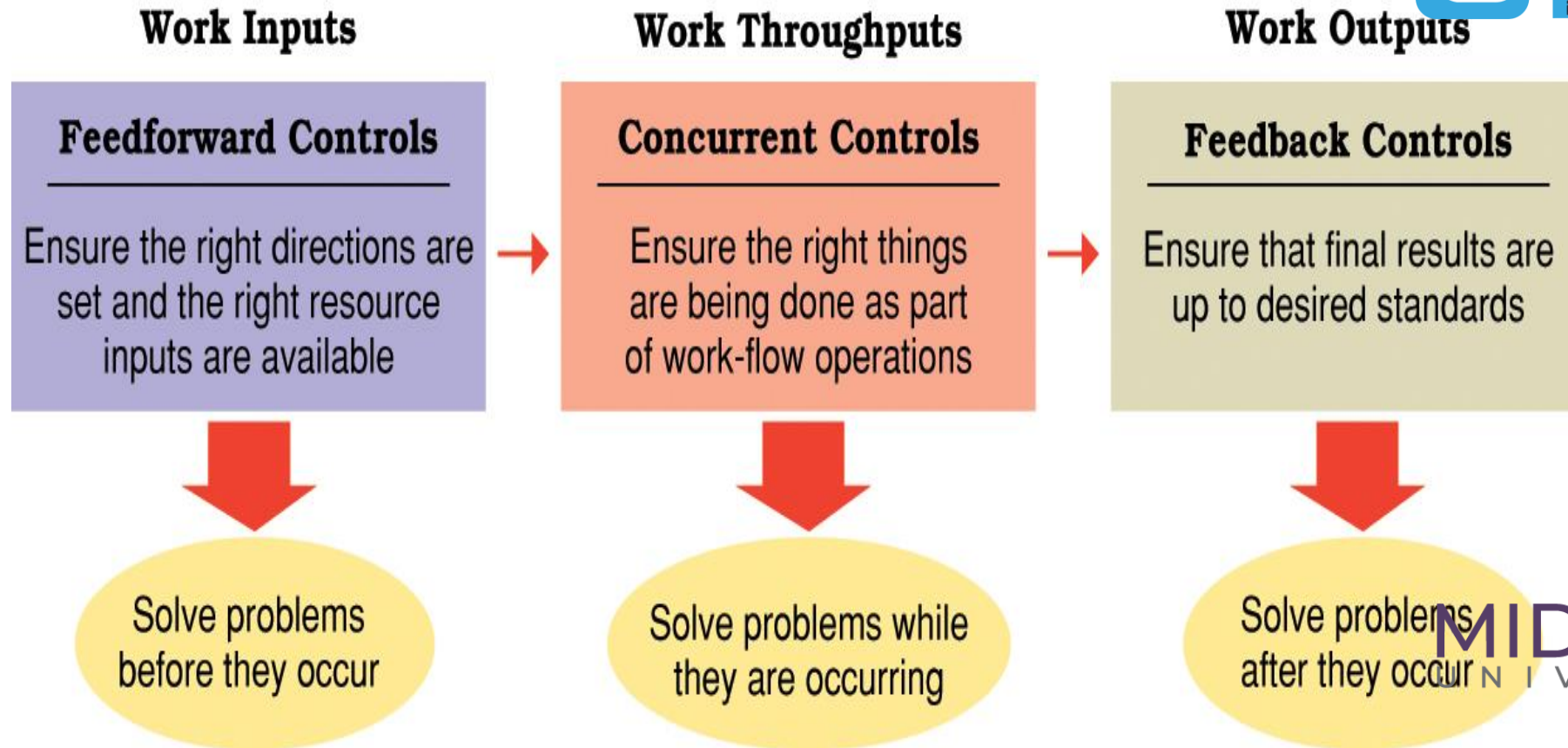
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The role of feed forward, concurrent, and feedback controls in organizations



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Effective Controls



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The Best Controls in Organizations are

- * Strategic and results oriented
- * Understandable
- * Encourage self-control
- * Timely and exception oriented
- * Positive in nature
- * Fair and objective
- * Flexible



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Questions

Answers



THANKS