

Strategic Planning Work System Improvement Tips

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Does your strategy and planning work system generate great idea flow rates? 1

Two or more years of work in an instance 2

How do you pick your projects?..... 2

How do you plan to succeed? 3

Steps for a better strategy and planning work system 3

Would you like to improve your strategy and planning work system? 4

About the author 5

Does your strategy and planning work system generate great idea flow rates?

Do you have pollution in your idea pool? Most organizations have a backlog of improvements they want to develop and implement. Most managers cringe when someone suggests that we hold a meeting to collect ideas from ‘everyone in the workplace.’

Too many managers and supervisors lack effective project management skills. Even fewer can design and use effective approaches to develop strategies and plans. How effective is your strategy and planning work system?

Unfortunately, I continue to witness the above facts in all too many organizations. After years of learning and experimentation I know what types of system changes to make to reduce idea backlogs. Best practice mechanisms exist that allow all team members to contribute their ideas for improvement.



Two or more years of work in an instance

I, like most facilitators, can go into any company, meet for an hour with a collection of their employees, and identify at least two, or three, years of project work for someone. It is for this reason that I strongly dislike suggestion boxes as organizations typically use them.

The typical suggestion box collects ideas with weak descriptions from a small group of people. Worse yet, we don't use a sound project evaluation and development to keep the idea box empty. Pollution begins to accumulate in our idea pool.

Leaders raise expectations when people think things will change. These expectations are then dashed when the organization fails to put suggested improvements in place. In most cases, people fill the box with problems that they are most familiar with. Without knowledge, they may not suggest things that may benefit the overall goals of the site the most. They don't understand why changes aren't made. Management takes a big credibility hit.

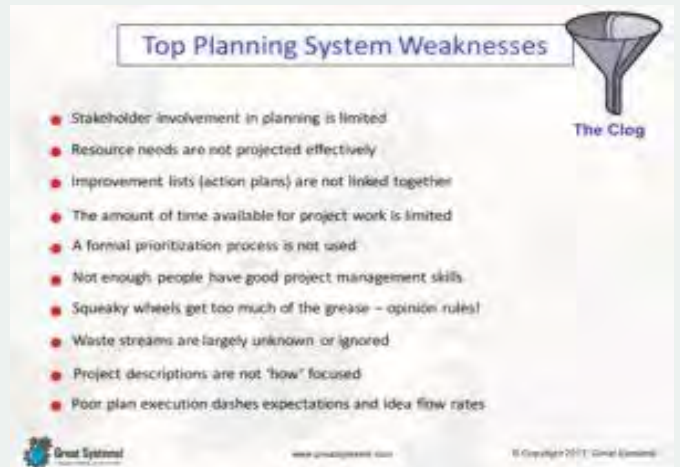
It is truly a vicious cycle. People won't share ideas because management won't listen, and management won't listen because the people suggest things that really won't make that much difference. As morale drops, supervisors spend more time on complaints instead of project work that would help reduce the gripes.

Finally, someone calls the consultant to fix morale. He or she asks the people for their ideas about how to improve it. An additional dump into the already polluted pool is made. How much pollution exists in your idea pool?

How do you pick your projects?

Like it or not, every person, team, location, and organization has limits when it comes to project evaluation and implementation. There is only so much time and money to go around.

Despite these limits, organizations still waste time on 'squeaky wheel' or 'pet' projects. They fail to focus their precious time and money resources on those areas that would provide the greatest return on investment.




Top Planning System Weaknesses

- Stakeholder involvement in planning is limited
- Resource needs are not projected effectively
- Improvement lists (action plans) are not linked together
- The amount of time available for project work is limited
- A formal prioritization process is not used
- Not enough people have good project management skills
- Squeaky wheels get too much of the grease - opinion rules!
- Waste streams are largely unknown or ignored
- Project descriptions are not 'how' focused
- Poor plan execution dashes expectations and idea flow rates

The Clog

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Example Decision Matrix

2009 Possible Plant Projects - Decision Matrix

		Project Value	Project Risk	Project Complexity	Project Uncertainty	Project Duration	Project Cost	Project Impact
1	Install bulk liquid handling and drumming system	5	3	2	4	3	2	1
2	Purchase and install wet handling system for main building area	1	3	2	4	3	2	1
3	Install of existing beam-columns to an existing existing column	3	3	3	3	3	3	3
4	Purchase and install flow control for high volume transfer points	3	2	3	3	3	3	3
5	Expand the flexibility of existing material processing equipment	1	3	3	3	3	3	3
6	Exchange existing area of existing processing equipment	4	2	3	3	3	2	1
7	Train all employees in the use of ERM applications	2	2	2	3	3	2	1
8	Install and test existing robotic storage facility for electrolyzers	1	3	3	3	3	2	1
9	Reduce the existing water flow in Line #1	1	4	3	3	3	2	1
10	Purchase and install new maintenance scheduling software	1	3	3	3	3	2	1
11	Provide SPIC training to all employees and visit judges	1	3	3	3	3	2	1
12	Set up and begin using plant trends for communication purposes	3	3	3	3	3	2	1
13	Purchase new software for all electrical equipment	4	2	3	3	3	2	1
14	Reduce the total plant water usage	4	2	3	3	3	2	1

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“The first step on the road to high performance begins with a choice.”

There are two ways to get more time for projects (other than hire more people). First, take waste out of jobs and use the time you save for project work. Second, improve how your people use their project management skills. Unfortunately, one needs system changes in the form of projects to reduce the waste. Reduce project development cycles via skill development and practice. Unfortunately, both take time.

The road to recovery first requires a recognition of what project time limits exist. Next, you must ensure that you focus those limited resources on the projects that provide the greatest ‘bang for the buck.’

While this seems like common sense, far too many organizations don’t use a formal tool to make decisions. They also tend to overestimate how many projects their people can complete in a set amount of time.

How do you plan to succeed?

Most companies plan on an annual basis. A group of people go offsite. They spend a day or two to list possible improvements and select their favorites from the list. Someone takes the pile of flip chart paper and creates a notebook that looks nice.

Then, leaders hand out the notebooks that are soon to join their peers on the office bookshelf. Tombstones of good intentions, ready to collect dust.

I admit that this perspective is a bit cynical. Some companies do a better job with plan development than this. You must judge for yourself how effectively your own organization plans. Where do their efforts lie on the spectrum between dust collector creation and innovative system change implementation?

One key lies in the fact that the better sites use formal processes to create their plans, review plan progress on at least a quarterly basis, and make efforts to improve this process each year.

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Steps for a better strategy and planning work system

I was lucky. I was able to spend five years with a company that did planning very well. They involved the entire workforce, and they focused their limited resources on those areas that needed them the most. They kept everyone informed about plan progress monthly, and they improved the process from



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year to year. Was everyone always happy? No, but in general, they were a lot more satisfied than other workforces I have seen.

You might notice that I speak more of annual planning versus strategic planning here. Well, that is intentional. Strategic plans are both nice and necessary, but one needs effective annual plans if you ever want to make those multi-year strategic plans come to life. Otherwise, you will end up with lists of what you want to do, and you will wonder what to do next to reduce the backlog.

To create effective strategy and plans, you must use your time and money resources wisely. The gap between your key results measures and their goals should tell you where you need to improve performance. Employee input and root cause analysis should help provide you with the answers to the 'how do we make the numbers better?' question.

Use a formal tool to systematically make decisions that consider each project's potential resource impact. Such a tool will help you pick those improvements that will make the most difference.

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Would you like to improve your strategy and planning work system?

For over 40 years, I have helped design and install strategic planning work systems in many different companies - both small and large - in the manufacturing and service arenas.

This experience has helped me discover value added, simple ways to set up an effective planning system. Such a system can help you make simple systems improvements that will significantly increase your idea flow rate.

Lack of time for projects and poor project management skills result in a poor idea flow rate - the primary power restrictor for this power system. The planning tools I share can help you both eliminate that barrier and move forward more rapidly towards higher levels of performance.

Keep improving!



Creating a Better Planning System

PEOPLE TIME
MONEY

Here are eleven ways to create a better planning system:

- Use a central database for all current and potential projects
- Use a well-designed input form to properly document all possible ideas
- Provide a means for all employees to contribute to the idea pool
- Budget more time for project development into every job
- Use a decision matrix to prioritize and select projects
- Create an annual operating plan for each site in your organization
- Employ the use of a simple, but focused, annual planning process
- Add a % complete column to all of your project progress action plans
- Teach a simple project management process to a majority of your people
- Identify and recognize your innovation threshold - your project hour limit
- Teach all employees about the time and money resource limits that exist

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About the author

As Chief Excellence Officer of Great Systems LLC, Kevin McManus provides virtual coaching and content to help people use proven best practices to enhance and optimize their daily work systems.

Over forty years of work experience in roles such as Industrial Engineer, Training Manager, Production Manager, Plant Manager, and Director of Quality give Kevin a 'real life work' perspective relative to daily work process optimization, work team engagement and empowerment, and sustainable operational excellence.



As a contract trainer for the TapRoot® root cause analysis process, Kevin has taught over 450 courses and further enhanced his ability to help leaders proactively minimize risk, reduce errors, and improve reliability. Kevin holds an undergraduate degree in Industrial Engineering and an MBA. He served as a national Malcolm Baldrige Performance Excellence Award Examiner for twenty years, including a three-year term on the national Judge's Panel.

Kevin has authored the monthly performance improvement column for Industrial and Systems Engineer magazine for over 20 years, is an Institute of Industrial and Systems Engineering Fellow and has been a member of IISE for over forty years. His newest book, "NextGen Leader Standard Work – the Key to Operational Excellence", will be published in late 2025.

If you would like more information about the improvement tools and systems I have to offer, please send me an e-mail at kevin@greatsystems.com.

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Pursuing Process Excellence

- 150 pages of ideas and examples that will help you accelerate and sustain your process improvement efforts
- Over 25 examples of 'best practice' assessment tools that leaders can use to encourage and support high performance work
- 12 team exercises that can be used to begin applying each concept as it is learned



Vital Signs Measurement

- 128 pages of ideas and examples to help you make your existing measurement systems more meaningful
- Over 30 examples of 'best practice' measurement tools and techniques that leaders can use to promote high performance work
- 14 team exercises that can be used to begin applying key concepts as they are learned



Error Proof

- 162 pages of strategies and dialogue questions to help you stop daily goofs for good
- Over 100 proven best practices that you can use to help error proof your key work processes
- Can be paired with the 100 page workshop workbook that contains 13 team exercises to help you begin applying key ideas



Facilitating and Leading Teams

- 182 pages of ideas, tools, and examples to help you improve work team, project team, and focus team effectiveness
- 10 assessments that will help you identify areas of strength and weakness relative to work and project team support
- Over 20 team exercises that will help you optimize your use of teams and improve meeting effectiveness, while also practicing your facilitation skills



How to Develop a High Performance Work Culture

- 162 pages of ideas and examples to help you begin changing your existing work systems so that they are less likely to hold back your culture change and performance improvement efforts
- Over 30 examples of tools and techniques that are used by high performance organizations to help shape their work cultures
- 14 team exercises to help you create work systems that support and encourage a high performance work culture

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