

# Setting Powerful Annual Team and Individual Plans

## *The Need*

The overwhelming majority of organisations have an annual planning cycle in which teams out together their individual and collective priorities for the year. Team objectives and personal performance contracts negotiated with the boss, or worse, copied from the schedule the planners gave you, implicitly have low ownership by the team.

The best teams we have worked with break this cycle by taking a time-out to get the whole team together and answer questions like:

- What should we be doing, given our purpose/role in this organisation?
- How can we add more value for the organisation and our external and internal customers?
- How can we work more effectively as a team to deliver great results?

One team at the oil company BP chose to do this through a facilitated process as part of their quarterly team meeting. The objectives were to (i) generate collective ownership for an integrated team plan (ii) get team members to understand and connect with each other's priorities (iii) identify owners for key tasks such as continuous improvement activity that did not align neatly with job roles.

A collaborative plan builds clear links for team members with the big priorities including measures of success. Working collaboratively also provides the opportunity to get everything on the table, reducing delivery risks.

## *The Event*

This was a facilitated two-day event in January for a team of fourteen people in a central department delivering both organisational objectives (from above) and providing expert resource to the front-line business. In addition to the team plan, the group worked on their team behaviours, continuous improvement opportunities and stakeholder management.

We tasked the group with pre-work to review both the organisational objectives passed down to them, and the front-line business requests for the next few months. The latter, was regarded as "business as usual" by the organisation i.e. it was taken for granted that this would somehow get done in addition to the new top-down initiatives.

At the meeting, the pre-work was reviewed in plenary and followed by small group work asking; what is our contribution to these big business organisation and front-line objectives – how can we add most value?

Building on this, the team used group work to populate a "wall" with all the "business as usual" activities and then turned these into deliverables that could be tested for value-added. For example, attending trade association meetings as a development activity for individuals and not just as a tick-box activity.

Only then were individuals asked to draft their personal performance objectives for the year reflecting both their own accountabilities and the team conversation. Once done, they tested this with at least two other team members working in pairs with people who were likely to have similar or contributing objectives.

After the meeting individual then agreed their annual objectives with their line manager as normal, except that the conversations were richer, more meaningful, and in time produced great performance.

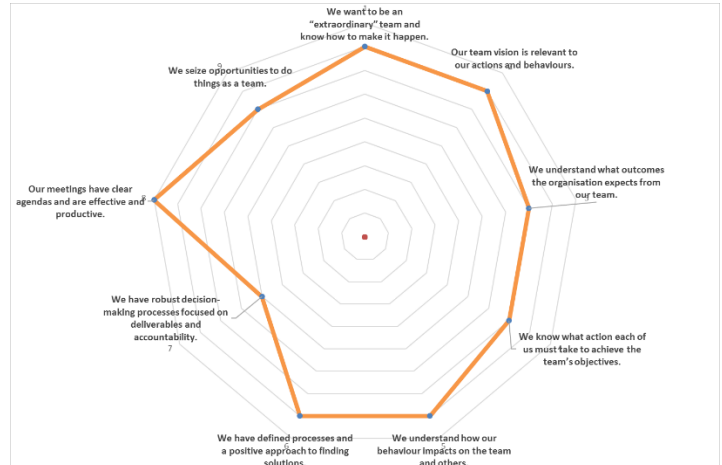
## *Key steps in the process*

- Team manager recognises that unless she does something different, with demands on all sides, the team will be overstretched and their performance will be compromised.
- Sharing all the available information through pre-work creates transparency and broadens the conversation from "my" annual plan, to "our" annual plan.
- Work in the meeting ensured that all aspects of the team plan were considered with a focus on value, not just allocating tasks to individuals.
- When people created their own annual plan, they were taking ownership of specific tasks in the team plan and understanding it's importance and relationship to the whole.
- As a valuable by-product, opportunities for continuous improvement and better stakeholder management were identified.

## The Results

The team has a simply great year not just in terms of performance but also team spirit. They went on to work with a team dashboard that measured key proven measures of team performance.

This foundation work took place in 2012/13. Today 2016/17, this team is still recognised as a cohesive team with consistently robust performance. Team members come and go, but the team culture remains one of collaborative high performance to add value to the organisation.



This was a team with internal customers, making a difference within pre-set organisational processes. For projects, alignment of objectives is even more critical especially if you'd like to involve the client, prime contractor and supply chain partners. We recommend a workshop process that emerged from the work of Andersen, Grude and Haug and that they called Goal Directed Project Management. It was later adopted by Price Waterhouse Coopers (PwC) and uses elements of systems thinking to address the co-dependencies, interdependencies and operability of complex projects.

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