

Planning the Assignment

Preface

Delegations are a request for help. Whoever has asked you to do this task/project, whether they are a teammate, a manager, an Executive, or even perhaps a “customer” or stakeholder to your function, they need something to be done and they have chosen to ask you to do “it”. Whatever “it” is, it has the potential to be an amazing opportunity for you to grow and enhance your skill set, your network, your political capital, your organizational acumen ... and your reputation.

Our assumption at this stage is that you have accepted the “delegation” so you have completed the thinking outlined in the tool, “You want me to do *What?*”

Delegations come in all shapes and sizes. They can range from an ask for a PowerPoint deck on a topic you are well versed in, to a month’s long project to organize and run a multi-client event.

The outputs also come in a wide range of authorities from: “Get me everything you can find on this prospect; summarize it and I’ll look at it. To “Give me your best recommendation on how we should handle this situation.” To “I trust you ... do what you think is right.”

Regardless of the size and shape and range, you need a tool, or a check list of questions to guide you on finding additional information you don’t know, people you need to talk to and basically thinking through a project plan.

For the PowerPoint deck example, the questions are about who the audience is, what the purpose is, how long the presentation time is, who is delivering it, etc. Pretty straight forward ... as long as you actually get answers to those questions.

For the multi-month project, you’re going to need a lot more answers.

This booklet is designed to help you with both of those delegations and all the ones in between.

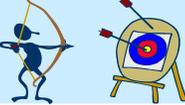
Your exercise for this part of the Delegation Module is to select a delegation you have received or one that someone created as an example. Then your task is to complete the “Planning the Assignment” form. The form is on the team site in a Word doc or found at the end of this PDF booklet.

Again, it may seem like a lot of questions, but it’s intended to train you to see the big picture and ensure you’ve gone broad and deep to address all the issues surrounding this delegation.

Our assumption in this training is that although you may identify several alternatives, you will be able to select the best one. We recognize in complex projects you would add another step of detailed evaluation of alternatives to make a decision. This is a subject of a future lesson.

By the way, we have used the term “customer” in these forms. In this instance, the customer is whoever will receive the final outputs of the assignment.

Planning the Assignment

<p>Rationale</p> 	<p>You have just been asked to take on an assignment—something that is not normally part of your day-to-day job— and to come back with a recommendation on what to do. Often this is known as delegation. This assignment can be anything: from one-hour of work to a multi-week project, from organizing the company picnic to creating a new management system. Regardless of size, duration or criticality, assignments—if you want to do them well—need to be managed through a process. Only then, you can be confident that you have covered all the bases and you are putting forward your best quality work.</p>												
<p>Objectives</p> 	<p>The objective of this workbook is to provide</p> <ul style="list-style-type: none"> • guidance on how best to tackle a delegated assignment • templates that should not only help clarify what you need to do but also provide you with a structure for documenting and tracking. 												
<p>Assignment Planning Process</p>	<p>The process consists of the following six main steps.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">Step 1</td> <td style="padding: 5px;">Define the Assignment</td> </tr> <tr> <td style="padding: 5px;">Step 2</td> <td style="padding: 5px;">Gather Information</td> </tr> <tr> <td style="padding: 5px;">Step 3</td> <td style="padding: 5px;">Develop Alternatives</td> </tr> <tr> <td style="padding: 5px;">Step 4</td> <td style="padding: 5px;">Weigh Alternatives</td> </tr> <tr> <td style="padding: 5px;">Step 5</td> <td style="padding: 5px;">Select the Best Alternative</td> </tr> <tr> <td style="padding: 5px;">Step 6</td> <td style="padding: 5px;">Deliver The Final "Package" And Implement The Decision</td> </tr> </table>	Step 1	Define the Assignment	Step 2	Gather Information	Step 3	Develop Alternatives	Step 4	Weigh Alternatives	Step 5	Select the Best Alternative	Step 6	Deliver The Final "Package" And Implement The Decision
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<p>Flexibility</p> 	<p>This procedure looks as if one moves neatly from step to step. This isn't the case; these six steps simply provide a structure for working through the assignment.</p> <p>They overlap, and you may have to return to earlier steps or continue to work them simultaneously until you have completed the assignment.</p>												
<p>Examples</p> 	<p>Examples of flexibility in the problem-solving steps:</p> <ul style="list-style-type: none"> • Information gathering occurs in all steps—from the initial delegation of the assignment to its implementation. • New information may force a return to Step 1. • Alternatives may be unworkable, and you'll have to find new ones. • Some steps may be combined or abbreviated. 												
<p>Caution</p> 	<p>In all cases, consider each step before proceeding to the next—if only in passing.</p> <p>Otherwise, you may fail to achieve the objective or achieve it only with greater effort and expenditure of resources.</p>												

STEP 1. Clearly Define the Assignment: Get answers to these questions from the person delegating the assignment.

1. Date Received: _____

2. Who is the “customer” for the assignment? (Who will receive the outputs?) _____

3. What outcomes or deliverables does the customer want and need from this assignment? Ask questions such as:

a. What do you want/need? _____

b. How will you know that you have it? _____

c. What does success look like? _____

d. What is the current situation that leads to the need for this work? _____

e. What resources are available to help with this? _____

4. Does the customer already “know” the answer? **Yes** **No**
• If so, what is the answer? _____

5. Who else might already know the answer? _____

6. Is anyone else working on this assignment? If yes, who? _____

7. When must this assignment be completed? _____

8. How will this work be used? (What other decisions may be made based on this work?) _____

9. What type of output is needed? Alternatives Recommendation Decision Implementation

10. In what form? Letter Report Presentation Project Plan

STEP 1. Clearly Define The Assignment - cont'd

Vagueness



A delegator may state the assignment in broad terms. The exact outcome may not be obvious.

For clarity, use one of the formats below to write a definition of the assignment. Then send it forward for confirmation.

Form	Example
Infinitive phrase	"To find ways to ..."
Statement of need	"We need to ..."
Question	"How can we ...?"

Use this space to write your definition of the assignment:

STEP 2. Gather the Information: In this step you will gather information and search for a solution.

There are four components to **Gathering** information:

1. **Brainstorm - Generate ideas of possible solutions**
2. **Sources - List where you might find information**
3. **Focus - Gather information related to possible solutions**
4. **Organize - Categorize information**

Brainstorm



Before beginning intensive research, brainstorm to form ideas and visualize potential solutions.

Sources



Make lists of sources of information. These may be people, documents, web sites, etc.

List who can advise you about the customer's management style, priorities and background:

List who might already know the answer or know where relevant data may be found:

List the "opinion makers" in the requesting organization:

List the experts and people who have undertaken similar assignments:

STEP 2. Gather the Information - cont'd

Focus



Early in your research, possible solutions may emerge. Focus information-gathering efforts on them. If you collect information without tying it to possible solutions, much of it will prove irrelevant, and you'll only have to discard it.

Organize



Organize the information into 6 categories:

- | | |
|--|--|
| <ol style="list-style-type: none"> 1. Assumptions 2. Constraints 3. Criteria | <ol style="list-style-type: none"> 4. Facts 5. Opinions 6. Definitions |
|--|--|

Assumptions

Ideas or predictions accepted without proof. An educated guess stating what's likely to occur in view of experience and information at hand.

Examples of assumption statements:

- Existing resources will (won't) support the solution.
- Additional resources will (won't) be available.
- Mission will (won't) remain unchanged.
- Project will (won't) be given top priority.
- Risk is (isn't) affordable.

Constraints



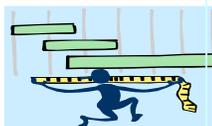
Limitations bearing on the problem and difficult to change:

- Lack of funds, manpower, time or other resources
- Biases of the decision maker or other powerful interests

Criteria

Standards to be met or conditions a solution must satisfy.

Facts



Events, past or present, either personally observed or reported. Sources of facts:

Source	Description
Reading	Gathering knowledge and analyzing other people's experiences.
Observing	Gaining perception of the situation and its relation to the problem.
Questioning	Acquiring knowledge and different views of the problem.
Testing	Validating or rejecting possible solutions as new information becomes available.

Opinions

Personal judgments. To be acceptable, they must be informed and bias free.

Definitions



Explanations of terms or procedures for unfamiliar readers.

STEP 2. Gather the Information - cont'd

Use the following Information tables to document your organized information.

Assumptions
1.
2.
3.
4.
5.
6.

Constraints
1.
2.
3.
4.
5.
6.

Criteria
1.
2.
3.
4.
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6.

STEP 2. Gather the Information - cont'd

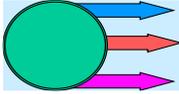
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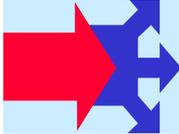
STEP 3. Develop Alternatives: When reaching this step, you should have enough information to support one or more possible alternatives.

List



On the following page, list as many alternatives as facts and assumptions will support. You will eventually weigh these alternatives against criteria.

Analyze



Use information gathered to:

- Reject the unsuitable.
- Retain the promising.
- Identify those needing more information.
- Note those likely to meet strong opposition.

Apply Criteria:



Use the following criteria to accept or reject possible alternatives:

Criteria	Description
Suitable	Fitting solution to the problem. Meets necessary conditions.
Feasible	Practical but ethical. Resources are available.
Acceptable	Worth cost or risk. People affected can live with it.

Review



Ask if the alternative is suitable, feasible, and acceptable. A suitable alternative is one that solves the problem.

However, it may not be feasible because resources aren't available, people won't accept it, or it may cause new problems.

Screen



Before completing your research, take these steps:

Step	Action
1	Screen out unsuitable alternatives.
2	Then screen remaining alternatives for feasibility and acceptability.
3	Identify alternatives that may be the source of nonconcurrences.
4	Direct further research toward facts needed to <ul style="list-style-type: none"> • review remaining feasible and acceptable alternatives. • replace assumptions. • evaluate potential nonconcurrences.

STEP 3. Develop Alternatives - cont'd

Possible Alternatives	Unsuitable	Promising	More Information	Opposition
A.				
B.				
C.				
D.				
E.				
F.				
G.				
H.				

Note disagreement



When developing alternatives, identify areas of potential disagreement. Dealing with this now helps eliminate or reduce possible nonconcurrences. If a proposal affects other people's agendas, they may vigorously oppose it.

As a practical and ethical matter, however, always consider opposing viewpoints—it's part of the delegation process. Honest dissenters may expose weaknesses in your thinking and suggest a better solution.

Try to settle



Before choosing an unpopular alternative, try to reach a settlement informally. If you can't, at least you will have given the opposition a hearing, and they can still formally not concur, if they wish.

Caution



Don't consider compromise until you have a full grasp of the problem. If you compromise too soon, you may give away the best solution.

For this assignment, skip Step #4 and go directly to Step #5

STEP 4. Rate & Weigh Alternatives: Now it is time to rate and weigh each alternative and choose the best.

Rate: Use a simple decision matrix to rate your top alternatives against criteria.
A template for your use can be found in Appendix A.

ALTERNATIVES				
CRITERIA:	A	B	C	D
Suitable				
Feasible				
Acceptable				
Additional criteria				

Legend:
 ✓ -- Meets criteria.
 0 -- Does not meet criteria.

Additional Criteria to Consider:

- Financial Impact
- Resources Impact
- Impact on Morale
- Long Term Impact (Precedent)

ALTERNATIVES						
CRITERIA:	A	B	C	D	E	F
Suitable						
Feasible						
Acceptable						

STEP 4. Rate & Weigh Alternatives: cont'd

Weigh



Consider all reasonable alternatives possible solutions. An obviously best solution is rare.

The best possible solution is the one that has the most flexibility and meets all or *most* of the criteria.

To weigh each alternative and eventually choose the best, use the following analytical hierarchy matrix.

Step	Action						
1	List alternatives in columns and rows as depicted in matrix below.						
2	Starting with Alternative A, go across columns in the matrix and rate each alternative against all the others. <table border="1" style="background-color: #008080; color: white; width: 100%; margin-top: 10px;"> <thead> <tr> <th style="text-align: center;">When</th> <th style="text-align: center;">Then</th> </tr> </thead> <tbody> <tr> <td>the alternative under consideration has more value than the others</td> <td>give the more valuable alternative a score of <u>1</u>.</td> </tr> <tr> <td>the alternative has less value than the others</td> <td>give the less valuable alternative a <u>0</u>.</td> </tr> </tbody> </table>	When	Then	the alternative under consideration has more value than the others	give the more valuable alternative a score of <u>1</u> .	the alternative has less value than the others	give the less valuable alternative a <u>0</u> .
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the alternative under consideration has more value than the others	give the more valuable alternative a score of <u>1</u> .						
the alternative has less value than the others	give the less valuable alternative a <u>0</u> .						
3	Tally score for each row. Highest score is the best choice. In the matrix below, alternative C scores highest, so it's the best choice.						

Analytical Hierarchy Matrix

	<u>Alternatives</u>				<u>Row Sum</u>	<u>Rank</u>
	A	B	C	D		
Alternative A	/	0	0	0	0	4 th
Alternative B	1	/	0	1	2	2 nd
Alternative C	1	1	/	1	3	1 st
Alternative D	1	0	0	/	1	3 rd

STEP 4. Rate & Weigh Alternatives: cont'd

List your alternatives in the space below and then weigh each alternative using the Analytical Hierarchy Matrix.

Alternative A	
Alternative B	
Alternative C	
Alternative D	

Analytical Hierarchy Matrix

	<u>Alternatives</u>				<u>Row Sum</u>	<u>Rank</u>
	A	B	C	D		
Alternative A						
Alternative B						
Alternative C						
Alternative D						

STEP 5. Select the Best Alternative: After weighing alternatives, one or two should stand above the rest. Select the best *one*.

But, don't waste time trying to create or pick the perfect alternative.

Remember the following quotation:

"... a good plan violently executed *now* is better than a perfect plan next week."

—General George S. Patton, Jr., *War as I Knew It*.

THINK

Who should implement this alternative?

What is the financial impact of this alternative?



Document your work and review your analysis and conclusions.

1. With whom should you review?
 - People who provided data
 - Experts
 - Opinion makers
 - Staff people from the customer's organization
 - Your manager (if s/he wants preliminary results)
2. Prompt the reviewer to ask "what about" questions.
3. Include how the alternative can be tracked to measure its success.
4. Revise if reviewers suggest valid constructive changes.

Step 6. Deliver the final "package" and implement the decision:

1. Deliver the "package" in final form—not a rough draft—to the appropriate person.
2. Be prepared to present an outline plan. An outline plan is a skeleton plan that contains enough information for detailed implementation planning to begin. If you are assured your recommendation will be adopted, prepare a complete plan.
3. Follow up: Your job doesn't end with the recommendation winning approval. Until it's acted on, the decision simply remains as a good intention. Follow up aggressively with:
 - A complete plan ready for execution
 - A memo to record who does what
 - A meeting to discuss taskings

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APPENDIX A

PLANNING THE ASSIGNMENT

BLANK WORKSHEETS

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 - a. What do you want/need? _____
 - b. How will you know that you have it? _____
 - c. What does success look like? _____
 - d. What is the current situation that leads to the need for this work? _____
 - e. What resources are available to help with this? _____
4. Does the customer already “know” the answer? **Yes** **No**
 - If so, what is the answer? _____
5. Who else might already know the answer? _____
6. Is anyone else working on this assignment? If yes, who? _____
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9. What type of output is needed? Alternatives Recommendation Decision Implementation
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Planning the Assignment

Use this space to write your definition of the assignment:

STEP 2. Gather the Information: In this step you will gather information and search for a solution.

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List the "opinion makers" in the requesting organization:

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STEP 2. Gather the Information - cont'd

Facts
1.
2.
3.
4.
5.
6.

Opinions
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STEP 3. Develop Alternatives: When reaching this step, you should have enough information to support one or more possible alternatives.

Possible Alternatives	Unsuitable	Promising	More Information	Opposition
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C.				
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H.				

STEP 4. Rate & Weigh Alternatives: Now it is time to weigh each alternative and choose the best.

CRITERIA:	ALTERNATIVES					
	A	B	C	D	E	F
Suitable						
Feasible						
Acceptable						

Legend:

- √ -- Meets criteria
- 0 -- Does not meet criteria

Additional Criteria:

- Financial impact
- Resources impact
- Impact on morale
- Precedent

STEP 4. Rate & Weigh Alternatives: cont'd

List your alternatives in the space below and then weigh each alternative using the Analytical Hierarchy Matrix.

Alternative A	
Alternative B	
Alternative C	
Alternative D	

	<u>Alternatives</u>				<u>Row Sum</u>	<u>Rank</u>
	A	B	C	D		
Alternative A	/					
Alternative B		/				
Alternative C			/			
Alternative D				/		

STEP 5. Select the Best Alternative: After weighing alternatives, one or two should stand above the rest. Select the best *one*.

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Document your work and review your analysis and conclusions.

5. With whom should you review?

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6. Prompt the reviewer to ask "what about" questions.

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