

The Payoff of Planning Backwards

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Nothing is more vital to management and leadership than careful planning. We should constantly strive to do it better. So, today I want to share a planning technique with you that I've drawn on for decades. I should acknowledge that today's episode is a bit longer than normal. But you'll find the extra time worthwhile, I'm sure. After all, any small way in which you can expand your effectiveness in planning is sure to Upsize Your Leadership.

One of my early mentors used to say, "Management is basically about two things: planning the work and then working the plan." Sounds simple, doesn't it? But if it's so simple, why do so many plans fail to deliver the results or outcomes which they were intended to achieve?

One reason, I believe, is that we put the cart before the horse in the way that we plan. Flawed plans, I've found, are often the product of a flawed planning process.

To illustrate, let me describe the planning approach that most of us follow. We may have learned this approach in a training program, from a book, or by simply internalizing what we saw others do.

In this typical planning approach, we are conscientious about how to start. The first thing to do is to describe our desired outcome – the goal or target that we want to meet. The product that we want to develop. The achievement that we want to attain. Whatever it is, we're aware that we can't plan to get somewhere unless we first know where we're going.

Thus, most of us are naturally inclined to start the planning process by defining the end game. Now, there are serious mistakes made at this point, to be sure. One of the most common is failure to define the desired outcome with adequate precision. The more definitively we can describe what we want to achieve, the more readily we make the right decisions to achieve it.

But let's not spend our time right now on how to define our desired outcome. There are lots of books, websites, and seminars that provide that guidance. Where I want to focus our attention is on what happens next, after the desired outcome is clarified.

What normally occurs is that we shift our perceptual position on the timeline which runs from where we are now to that desired outcome. We move from that point in the future where we

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figuratively stood as we defined the outcome and reposition ourselves in the present, looking out into the future at that outcome.

Next, we start compiling a list of things which must be done to move from where we are at present to the moment when we achieve our outcome. Basically, we are identifying and sequencing the prerequisites for reaching our goal.

Perhaps we write down each prerequisite on a post-it note, then begin arranging the notes on a tabletop or whiteboard, sequencing them in the order in which they should be completed. Or if we are using planning software, we do something equivalent with the tools in the software.

As part of this process, we eventually start adding target dates for finalizing each phase of our plan. Little by little, the plan takes shape. Every step in this planning endeavor is reasonable and logical. But all too often, when we start implementing the plan, things do not unfold as we had anticipated. We discover that we had failed to anticipate a critical prerequisite which had to be met. Or we find out that we were far too optimistic with our target dates. We can't meet them, and the entire effort falls behind schedule.

Our plan may have been mapped beautifully. But it was flawed in some of its assumptions. Is there a way to minimize the kinds of oversights which lead to needless delays and setbacks? I believe there is. I call it planning backwards.

Our traditional approach is to develop plans while looking forward to some ultimate outcome. In the foreground of our vision are all of the things that we need to do in the near future. As these multiply in number, they tend to clutter our field of vision. With this cluttered field of view, we can easily overlook some critical element which lies months or years ahead on our timeline. Another thing which happens is that so many immediate initiatives are staring us in the face that in a subtle and almost unnoticeable way, we quit paying as much attention to the longer-range pieces of the plan as they deserve. Our eagerness to get underway with what needs to be done soon bleeds our attentiveness to later elements of the plan.

Therefore, let me offer an alternate method for planning for goals or outcomes months or even years into the future. As I've said, my term for it is planning backwards. We normally think of planning as looking forward, starting in the present and working toward the desired outcome. Planning backwards puts together the elements of a plan by starting at the end and working back to the present.

I'm doing this myself right now with two major initiatives. One is the launch of a one-hour streaming TV show to be produced weekly. The other is the standup of a peer-to-peer mastermind group the middle of next year. For purposes of our discussion today, I will use the streaming TV show as an example.

In planning backward, we still begin the same way that do when planning forward. That is, we start by clearly defining our desired outcome. Ideally, we should be able to describe it in specific, sensory-rich language. That is, we should describe it in terms of what we will be seeing, hearing, and experiencing at the moment the outcome is achieved. In effect, we are making the outcome highly picturable, which becomes quite valuable as we move to the next stage of our planning process.

Remember how, earlier in the program, I talked about a timeline stretching from where we are at the moment to our desired outcome? Let's make use of that timeline again. We are going to

picture our desired outcome out ahead of us on that timeline. Then in our imagination, we're going to move to the moment on the timeline when the outcome is acquired.

Using my example, at that point, as the first telecast of the program begins, I can see the camera right in front of me, the lighting set just right to produce a clear, sharp image. On screen, I can see a countdown clock, indicating that we are seconds from going live. Then, as the clock hits zero, I can hear the theme music playing to signal the start of the show. I'm feeling eager and confident, because I know that we have done everything possible to be well prepared for this moment.

Notice that as I've described this outcome, I've done so from a first-person perspective. My point of view is from within. I've been seeing things through my own eyes, hearing them through my own ears, feeling sensations in my own body. There's a scientific reason for choosing this perspective. Neuro-science has shown that future outcomes have a more compelling impact with regard to motivation when they are couched in a first-person perspective than if we merely picture them from a second-person perspective. A second-person perspective is a viewpoint outside of ourselves, akin to a video which someone made of the occasion.

Now, everything we've done so far works well whether we are planning in a conventional manner or planning backwards, as we are doing today. What happens next is where the two planning approaches go separate ways.

Having developed this sensory-rich, first-person perspective of the anticipated outcome, I'm now going to step out of the first-person experience, step onto the timeline, and move somewhat beyond the moment that I've just been engaged in. In other words, I'm going to position myself at a place on the timeline at which I can look back at the moment my goal was achieved and look at the timeline leading up to it from that place on the timeline which we would call Now. In essence, I'm looking backward along the timeline, with the accomplished outcome in my immediate field of vision.

At this point I'm going to break out those post-it notes again. Or my whiteboard and pens. Or my planning software – whatever I'm using to capture key components which must be part of the plan.

And now, still from the perspective of standing on the timeline, just beyond the desired outcome, I'm going to ask myself, "What must happen shortly before my desired outcome becomes reality?"

Returning to my example of launching the streaming video show, these are some of the things which might show up on my list. My telecommunication connections with the program engineers in New York must be working properly. The proper green screen overlay must be in place. The microphone must be properly positioned, it must be at the right settings, and appropriate audio checks must be complete.

Now, all these things relate to the physical delivery of the show. But non-physical considerations must have also been addressed. The script for the show must have been mapped out. Any guests must be standing by, ready to be linked into the program on short notice. Advertisements from sponsors must be ready to air. The theme music must be queued. Any graphics to be used during the show must be loaded into the video system. And importantly, there must have been sufficient promotion to have an audience which is tuned in.

We could obviously add other items to this list. But my purpose here in building my example is to be illustrative, not exhaustive. What I want to illustrate is how quickly and in what detail we were able to compile a list of all the many details that must come together at the final moment for the desired outcome to transpire.

With conventional planning, we would have eventually thought of all of these things. But they might not have become apparent to us until we were well into the implementation phase of the plan. And because they slipped onto the “to do” list once the plan was being executed, adjustments to the plan have to be made on the fly to accommodate them.

The first goal in planning backwards is to easily compile a list of everything that must be checked off for the desired outcome to be achieved. Since I work with post-it notes for an exercise like this, I now have a pile of post-it notes, each identifying something that must be fully completed and in place for us to be ready for show time.

But we’re nowhere close to being finished planning backward. Next, I’m going to put one of those post-it notes on a tabletop or whiteboard or even tack it to a corkboard (if I even still have one around), and I’m going to do some backward planning with it. To illustrate, let’s imagine that I’ve chosen the post-it note that says “Guest on standby.” Because those of us in the West are used to seeing processes laid out left to right, I’m going to put that post-it note on the far-right side of my tabletop or whiteboard.

Then, I’m going to pause for a moment and picture that guest waiting on standby. Once I picture that fully, I ask myself, “Before the guest can be on standby, what must be done?” Several things immediately come to mind.

Obviously, I must have the guest’s agreement to appear. So, “Agreement to appear finalized” goes on a post-it note. And what must happen before I have an agreement to appear? I must make initial and follow-up contact with the prospective guest. Thus, the words “Initial contact and follow-up completed” go on another post-it note. And what must I know before I contact a prospective guest? I must have decided on the theme for the show on which the guest is to appear. “Theme for show set” goes on another post-it note.

Note that as I’ve worded these post-it notes, I attached a verb of completion to each of them. “Theme for show set.” “Agreement to appear finalized.” “Initial contact and follow-up completed.” My post-it note for the desired outcome reads, “First show goes live.”

There’s a reason for this procedure. For planning purposes, it’s helpful to view these critical steps as finished items. That makes them more concrete. They are not worded as an effort to be undertaken, but as a substantive accomplishment which has been achieved.

Let me illustrate by using the contact and follow-up with the guest. Had I worded it merely as “Initial contact and follow-up,” it would have sounded like something I should give attention to. But by labeling it, “Initial contact and follow-up completed,” I make it a concrete accomplishment. I can now ask, “What will that milestone look like when I’ve achieved it?”

When I see it as a concrete achievement, it’s easier to envision what must have happened in order for this outcome to have been achieved. I’m therefore better equipped to answer the question, “What must have happened in order to accomplish this?”

I think you're seeing the pattern here. I keep asking, "What must happen before this can happen?" And each iteration of that question moves me farther and farther back down the timeline toward the starting point for the entire endeavor. We are planning backwards.

And to enhance this technique, keep repeating the pattern that we used at the top of this exercise. Recall that with our desired outcome, we started our train of questions by stepping beyond the outcome on our timeline and looking back at the desired outcome. From that perspective we then envisioned the chain of achievements which led to it.

Do something similar whenever you ask, "What must happen before this can happen?" Whatever "this" is, step beyond it on the timeline, look back on it toward the starting point, and pose the question from that perspective. Again, the more concrete you have made the milestone on which you're looking back, the more productive this tactic is likely to be.

Moreover, often as you look back on a milestone, you recognize that several things must have occurred to make it possible. For instance, when I asked what must happen to have a guest on standby when the show starts, I first went down the trail of identifying and recruiting the guest. But other things must happen, too. We have to verify well in advance that the guest has internet access fast enough to handle the video and audio feed without freeze-ups or dropouts. We have to confirm that the guest's video camera and microphone give us the quality that we want for the program. We need to test the guest's video feed with the lighting that will be used for the show to be certain that no adjustments are needed.

Each of these items goes on separate post-it note. (Are you getting the sense that you're going to need several pads of post-it notes before this exercise is finished?) Thus, the question, "What must happen before this can occur" may identify multiple back-trails leading to it.

For the moment, let's return to that backtrail about securing a guest's participation. Since we have a number of post-it notes which go on that backtrail, we now lay them out in the sequence in which they need to occur. We start by placing the note which reads "Agreement to participate finalized" on the right side of our working surface. Then we build the backtrail to the left, sequencing milestones as they must occur. Where certain things need to happen in parallel, we place the notes one below the other.

I've chosen this particular backtrail for our example, because the process of finding and recruiting guests will be an on-going cycle once the show is in production. Efficiency demands that we automate whatever portions of it we can. It also demands that we delegate to or contract with another organization to take care of given steps. In my case, the engineering crew for the network will need to confirm that the guest's equipment and internet connection are adequate.

As I'm looking at the post-it notes, laid out in the general sequence in which these individual steps must transpire, I ask myself, "Which of these can be automated?" On that note I place an "A" in the upper righthand corner of the note and circle it. That will remind me later that I need to explore the feasibility of automating this portion of the process.

Where something may be delegated or contracted out, I will put a circled D (for "delegate") or a circled C (for "contract") along the top of the note to revisit that option later on. I'm not going to take time from my immediate planning to think through the details of automating, delegating, or contracting out various functions. Right now I want to stay focused on building the trail of dependencies behind every critical phase of my plan.

Once I have a particular dependency trail extending all the way back to the present moment, or to its natural starting point, I finalize the sequence of post-it notes, review it carefully, add any additional steps which come to mind, and take a quick picture of the layout for future reference. That allows me to clear the tabletop or whiteboard and develop the backtrail of dependencies for another milestone.

Trail by trail, we identify everything which must be taken into account in our plan. Once we've mapped all the major dependency trails, we are ready to use whatever planning process with which we are familiar to start writing out a plan of action.

Perhaps your experience will be different, but when I use the technique of planning backward, I find that it has several valuable benefits. For me, at least, the elements of the plan come together more quickly than with conventional approaches to planning. Perhaps this faster processing has to do with the fact that – for me, at least – it's easier to look at something which has already been done and picture what must have happened before it could have occurred than it is to try to anticipate all of the things which must be accomplished before I can reach a distant given milestone.

And the nice thing about this technique is that it works just as well in group planning scenarios as it does for planning alone. And it has served me well for decades. Over that period of time, only exceptional developments have ever presented me with an eventuality or necessary step that we failed to consider in our initial planning.

If you're interested in taking this approach for a test drive, use it for planning something with a moderate degree of complexity – perhaps your next vacation. I'm not saying to plan the vacation per se, but rather everything leading up to your moment of departure. See if this approach gives an added boost to pulling together a plan that fully anticipates and schedules everything that would otherwise end up on a haphazard to-do list.

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