

White Paper: Web Based Planning and Performance Management

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Introduction

The One Page Planning & Performance System (TOPPPS) is a web-based tool for helping groups of people in companies effectively implement their strategic and tactical plans.

For small companies without a planning process, or at the project level in larger companies, TOPPPS also provides a basic planning process. Its structure helps groups of people agree on and align around a set of strategies and objectives -- and then effectively implement those plans.

TOPPPS is based on Jim Horan's best selling business planning book, *The One Page Business Plan* (regularly number one in sales of 631 business planning books on Amazon.com).

The essence of the system is that each manager, executive, and key employee is asked to reduce his or her part of the typically thick corporate planning documents to *a single page*. On this page they put their understanding of what they personally are responsible for doing — their piece of the company's plan.

TOPPPS requires everyone on the system to write, for his or her job:

- A Vision statement
- A Mission statement
- A set of Objectives that are measurable, with Scorecards
- A set of longer-term Strategies
- A list of Action Plans or tasks to be accomplished, with due dates, and with running Progress Reports on each.

The person fills out Progress Reports for each Action Plan, entering every two weeks a brief statement about what has been accomplished on each task.

Every person's One Page Plan, including the data on their performance scorecard and their progress reports, is posted on a secure website. There is a company log-in name, and each person has a user name and password. The whole system can also be configured to operate within the firewall of a company.

At a click of the mouse it is possible for any executive or manager who has access to the system to *read* the plans of others in the company to see what they have committed to accomplishing, and how they are coming in implementing their action plans and meeting their objectives. Any group working together can easily track their collective efforts to implement their plans.

The system is easy to use, cheap, and reflects the wisdom of Jim Horan's 20+ years of experience as a CFO running planning processes for companies of all sizes.

Benefits

- Focuses Everyone on Results
- Excites People about Planning
- Aligns Every Level of an Organization
- Insures Effective Communication
- Supports Implementing Plans Effectively
- Shortens Meetings
- Teaches Basic Management Thinking While Doing

Focuses Everyone on Results

TOPPPS, by its structure, focuses everyone involved on the issue of results. Each person has to describe the results he/she is expected to produce, and every month has to enter an actual number, so accountability for results is ever-present.

Many advances have been made in the last ten years in defining measurements and indices of performance that do truly track what any company is trying to do. Inevitably what is measured is paid-attention-to by the company, and good measures enable companies to make better resource-allocation decisions than they could otherwise.

The act of bringing in TOPPPS and then working with each person to find appropriate measures for tracking performance is, in and of itself, invaluable to companies. None of these measures are imposed from outside. Rather TOPPPS structurally involves everyone in thinking through what is the right way to measure success for his/her job and to allocate resources accordingly. No other system can involve everyone in this thinking so effortlessly and with such a positive tone.

How much is an company-wide, pervasive, focus on results worth to your company?

Excites People about Planning

TOPPPS, because it is WEB-based and electronic, makes the process of planning much quicker and easier on everyone. People aren't inundated by paper or meetings. They genuinely devote their time to thinking through how to be effective in their job in the coming year. Nearly everyone reports a sense of excitement at planning and the usability of the results from it, rather than the oft-experienced sense that it is a huge, time-consuming exercise with little payoff.

Once the One Page Plans are finished, everyone can look over everyone else's plans and understand them easily. All of the information in each plan comes up in the same place, in the same format, with the same level of detail.

How much money do you spend now doing pencil-and-paper plans that are hard to share, often lack a consistent and comparable level of detail, and are difficult to track?

How much would be saved by doing it effortlessly, in comparable form, and electronically?

Aligns Every Level of an Organization

The process of making changes in plans to make them better is effortless since they are electronic. For the most part plans are changed right in meetings, as people talk through better ways to get things done. Everyone can watch the process as it takes place, because it is projected on a screen.

As a result of the initial meetings after the plans are first posted, everyone makes many adjustments in their objectives, their scorecards, their strategies, and their action plans. Everyone works on aligning them, on deciding who should do what, and on thinking through problems and actions that lack alignment. After a monthly cycle or two, with an accompanying monthly assessment meeting, the plans settle down. All the major changes are made. Then everyone knows what he/she is responsible for doing, how it will be measured, and how the results fit with what everyone else is doing.

How hard is it now to align pencil-and-paper plans by making adjustments after they are completed? Is everyone involved in the process and part of the decisions to make changes in who does what to be more aligned?

How much would it be worth to your company in terms of efficiency and effectiveness to have the whole leadership team fully aligned?

Insures Effective Communication

A side effect of the use of TOPPPS is that there is complete communication among the leaders of the company about what each of them is doing. They not only understand each-other's responsibilities, they can click the mouse and read anyone's instantly if they ever forget. Each person's plan, progress reports, and objective measures of performance are always being updated. TOPPPS fosters shared knowledge. Inevitably when a company gets up on TOPPPS, they see all kinds of opportunities they have been overlooking.

Most companies have found that the benefits of accurate communication are so great that they are also creating an employee user name and password so that anyone in the company can go in and read anyone else's plan. It is much more effective than newsletters or other communication devices.

How valuable would full communication among your managers and executives and perhaps to your staff be to your company?

Supports Implementing Plans Effectively

Once everyone is up on the system, it becomes relatively easy to manage the company in terms of the plans. Typically, every week or two each person enters a short progress report statement on each of his/her action plans. Typically, every month each person on the system has to enter a hard number into the measuring scorecards for his/her objectives. These are read by everyone prior to any management meeting. Then management meetings focus on problem areas where

numbers are not being met. It takes no more than half-an-hour for each person to make these updates each week or month. The payoff is very great.

How much would it be worth it to your company to be able to be on top of the implementation of plans on a weekly and monthly basis?

Shortens Meetings

Most studies suggest that as much as 85% of meeting time is spent listening to people present status or progress reports. Only about 15% is devoted to action planning and problem solving. Experience with TOPPPS is that the percentages are reversed. Everyone reads the status information — progress reports and scorecards — in preparation for a meeting. The meeting focuses on what to do about problems and what to do to take advantage of opportunities.

TOPPPS also reduces time spent tracking people down to learn about how they are coming with some important activity. A click of the mouse yields the progress report entries on each person's projects. Companies with TOPPPS are now routinely reporting that many meetings are much shorter!

How much would it be worth to your company to eliminate the need for status reports in meetings, focus more energy on problem solving, and shorten meetings?

Teaches Basic Management Thinking While Doing

Experience with TOPPPS confirms that it actually teaches while people are working with it. Just the requirement to put down the vision, mission, objectives, strategies, and action plans compels people to think in that structure. Soon the language of results pervades the company. This is particularly true with companies where many of the people have not had such training, such as high-tech companies at the level of project leaders. One president of a high tech company said that TOPPPS was like putting his managers through the first year of a business school.

How much would it be worth to your company to have largely untrained or inexperienced leaders learn to think in an accountable for results way?

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