

# SAMPLE PLANNING TEMPLATES

## THE BASIS FOR LEADERSHIP DISCUSSIONS AND ACTIONS

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There are sample planning templates for each of the leadership strategies. On the website they are in PDF form, so you can't change them after downloading.

If the sample planning templates work for you as they are, that's great. If you want to change them, go ahead and do that in whatever program you like. If you design your own planning templates, the basic design principle is to "keep it simple."

You can always add complexity where it is needed, and that is often the case. The simple approach begins the process, but full implementation may very well require more detail - But keep it simple in the beginning.

There are lots of planning tools that can also be used, such as Gantt Charting and Responsibility Charting and there are project management programs that can support more complex approaches. Combine whatever will work for you.

ACT I:  
THE VISIONARY

STRATEGY #1: THE BUSINESS CASE

ACTION

TIMING

RESPONSIBLE

**Strategy #1: The Business Case**  
Create a shared perception of the need for change and a sense of positive urgency.

ACTION	TIMING	RESPONSIBLE

**ACT I:  
THE VISIONARY**

**STRATEGY #2: VISION**

ACTION

TIMING

RESPONSIBLE

**Strategy #2: Vision**

Create a strategic vision of the desired state and assess the likely impact on the organization and its people.


# ACT I: THE VISIONARY

## STRATEGY #3: LEADERSHIP COMMITMENT

ACTION

TIMING

RESPONSIBLE

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**Strategy #3:  
Leadership Commitment**  
Create a vision of how the journey  
will be conducted and the leader-  
ship commitment being made.

ACT I:  
THE ARCHITECT

STRATEGY #4: ORGANIZATION DESIGN

ACTION

TIMING

RESPONSIBLE

**Strategy #4: Organization Design**  
Create the organization design  
required to realize the vision of  
the desired state.


# ACT I: THE ARCHITECT

## STRATEGY #5: ACTION PLAN FOR THE JOURNEY

ACTION	TIMING	RESPONSIBLE

**Strategy #5: Action Plan for the Journey**  
Develop a plan for leading the journey to close the gap between current reality and the vision of the desired state.

ACT I:  
THE ARCHITECT

STRATEGY #6: LEADERSHIP WEB

ACTION

TIMING

RESPONSIBLE

**Strategy #6: Leadership Web**  
Design the web of leaders and followers required for the journey and build the core elements of that web.


# ACT II: THE CATALYST

## STRATEGY #7: EXPANDING THE LEADERSHIP WEB

ACTION

TIMING

RESPONSIBLE

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**Strategy #7: Expanding the Leadership Web**  
Bring people into the web of leaders with clear roles, expectations, and support.



# ACT II: THE CATALYST

## STRATEGY #8 : OPERATIONAL DETAIL FOR THE VISION

ACTION

TIMING

RESPONSIBLE

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**Strategy #8: Operational Detail for the Vision**  
Add the operational detail to the vision and organization design.

# ACT II: THE CATALYST

## STRATEGY #9 : PREPARING THE PEOPLE & THE ORGANIZATION

**Strategy #9: Preparing the People & the Organization**  
Conduct a “change readiness and capability study” and prepare the organization and its people for the journey.

	ACTION	TIMING	RESPONSIBLE

# ACT II: THE GUIDE

## STRATEGY #10: COMMUNICATION

ACTION

TIMING

RESPONSIBLE

**Strategy #10: Communication**  
Develop and maintain systems for communicating out and back in (feedback), as well as for promoting dialogue among people.

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# ACT II: THE GUIDE

## STRATEGY #11: LETTING GO AND DEALING WITH "INBETWEENITY"

**Strategy #11: Letting Go and Dealing with "Inbetweenity"**  
Guide people in letting go of what must be left behind and dealing with the challenges of the in-between state.

	ACTION	TIMING	RESPONSIBLE

# ACT II: THE GUIDE

## STRATEGY #12: ACCOUNTABILITY

ACTION

TIMING

RESPONSIBLE

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**Strategy #12: Accountability**  
Create processes and an environment that promote Dynamic Accountability in order to maintain direction and energy.

# ACT II: THE BUILDER

## STRATEGY #13: LEADERSHIP MAINTENANCE

**Strategy #13:**  
**Leadership Maintenance**  
Expand and maintain the web of leaders and build the capabilities required for the journey.

ACTION	TIMING	RESPONSIBLE

# ACT II: THE BUILDER

## STRATEGY #14: MUSCLE BUILDING

ACTION	TIMING	RESPONSIBLE

**Strategy #14: Muscle Building**  
Identify and build the individual, group, and organizational capabilities required in the desired state.

# ACT II: THE BUILDER

## STRATEGY #15: MASTERY

ACTION	TIMING	RESPONSIBLE

**Strategy #15: Mastery**  
Guide people in the process of discovery and the extended challenges of mastery.



# ACT III: THE INTEGRATOR

## STRATEGY #16: MANAGING THE "RIPPLE EFFECT"

**Strategy #16:**  
**Managing the "Ripple Effect"**  
Assess the "ripple effects" of the changes, including the likely reactions of others, and determine a range of responses.

ACTION	TIMING	RESPONSIBLE

# STRATEGY #17: ALIGNING THE ORGANIZATION

## ACT III: THE INTEGRATOR

**Strategy #17:**  
**Aligning the Organization**  
Align the “things” of the organization to institutionalize the changes.

ACTION	TIMING	RESPONSIBLE

# STRATEGY #18: ATTUNING THE PEOPLE

## ACT III: THE INTEGRATOR

**Strategy #18: Attuning the People**  
Ensure that the people of the organization have internalized the changes and the organization takes advantage of increased capabilities.

ACTION	TIMING	RESPONSIBLE