

Near-Term Planning Meeting

Teams use this meeting to create new near term plans when a rapidly emerging situation means your existing plans won't work.

Purpose:

To decide on a new short-term plan of action during times of rapid change or crisis

Expected Outcomes:

- A new short term plan for the next few days, weeks, or month
- Ideas about alternate plans you could try if this plan doesn't work
- A defined list of next steps
- A date for the next meeting where you'll review results
- Commitment to the plan

Process

1. Set Intention
2. Pre-Mortem
3. Set Priorities: Start-Stop-Continue / Min Specs
4. Create an Action Plan
5. Closing Review and Appreciations

Timing

This meeting is designed to give teams an efficient, but not reckless, process for creating a new plan. The meeting duration will vary based on the scope of work that needs to be re-planned and the flexibility your team has in your response. If you run a complex large organization and you have several weeks to implement your near-term plan, this meeting will take many hours to complete. If you run a small team responsible for a handful of deliverables, this meeting will take two hours or less.

Your team may achieve the intention you set in this plan before the crisis ends. When that happens, run this meeting again. Teams that run this meeting more than once in the same month will find the second or third time through go much faster, as your team has already explored multiple options in previous meetings.

The plans created using this meeting work best when the resulting action is reviewed and refined in frequent After Action Review meetings.



Step-by-Step Instructions

Before the Meeting

When you schedule the meeting, make sure everyone knows what happened to make a re-plan necessary and what you assume the near-term intention will be.

Then, ask everyone to come to the meeting prepared with the list of activities they're currently doing or planning to do, and a recommendation about which activities they consider critical and which can be put on hold.

During the Meeting

1. Set Intention

Greet everyone and provide a brief situation update to frame the discussion. Then, share what you see as the most important near-term intention that your plan must achieve.

This idea of intention comes from the military, and it roughly translates to the purpose of your action and desired outcomes you all want to see when the plan succeeds.

For example, you might say:

*We need a to create a short-term plan that reduces expenses by 50%. (The Plan's Purpose)
Cutting expenses will let us retain half our retail staff and maintain administrative functions throughout the current shut down. (Desired Outcomes)*

Then, if appropriate, invite your team to dig into this intention by questioning the assumptions behind it.

For example, might there be other ways to maintain administrative functions? And why does that matter? Is it in everyone's best interest to retain half the retail staff, or would employees be better served by collecting unemployment? What if there was a way to retain more employees? What if you could increase revenue instead of reducing expenses?

Invite a vigorous discussion about your team's short-term intention. Every crisis creates both challenges and opportunities, and this discussion will help you all better see those possibilities.

When your team agrees that the intention is correct and clear, write it down and move to the next step.

2. Pre-Mortem

Teams use a pre-mortem to quickly think through the key risks they'll face in an upcoming project. This process taps into our natural ability to spot all the problems and gaps in an idea, which most people can do much more easily than they can think up positive great ideas.

To begin, ask your team to list of all the reasons your team might fail to achieve the desired intention.



For example, you might say:

“Imagine for a minute that we completely fail here. Why might we fail? List every reason you can think of silently on your own in the next 5 minutes.”

Set a timer while your team writes reasons you might fail in a private document or individual sticky notes. At the end of five minutes, invite the team to share the reasons they’ve written.

For example, you might say:

“Now, our goal is to get all these ideas out where we can keep them in mind as we plan. We don't need to debate or discuss these in any detail - we're just going to get it all out there. Let's go-around and share, one idea at a time.

When someone shares their idea, if you have something similar to that, speak up and add yours too. If you don't understand an idea, please ask for clarification - but again, clarifying questions only. This isn't the time for debate; we'll do that next.”

Get all the ideas out where your team can see and discuss them. With all these ways you might fail in mind, you can create plans designed to prevent those mistakes and reduce those risks.

3. Set Priorities: Start-Stop-Continue / Min Specs

Next, create a prioritized list of near-term activities.

Step 1: Individual Start-Stop-Continue lists (4 minutes)

Ask everyone to organize the list of activities into Start/Stop/Continue categories, adding anything that's occurred to them during the meeting.

Prompt: Given what we're trying to achieve and all the ways we might fail:

- What do we need to Start doing right away?
- What must we Stop doing to free up time and focus our resources?
- What must we Continue doing?

Step 2: Combine Lists

Working in groups of 4 or 5, team members combine their lists into a single list.

- First, one person shares their list.
- The rest of the group adds any activities they have on their lists that aren't on the first person's list.
- Then, the group discusses any activities that they've put into different categories and resolves those disagreements.

If you have multiple groups, take a quick break. When you return, follow the same steps to combine each group's list into a single Stop, Start, Continue list.

Step 3: Confirm that each Start/Continue activity is truly required.

You want your plan to be as lean as possible. In rapidly-changing complex situations, you want to achieve your intention as efficiently as possible so you can free resources up to resume normal operations.

With your combined list, look at each activity in the Start and Continue categories. Test that each one is absolutely necessary by asking these questions.

- If we didn't do this, could we still achieve our intention?
- If we did everything else except for this, could we still succeed?

Your near-term priorities are the items that pass this review (meaning you must absolutely do them to succeed).

NOTE: if your teams feel like they can accomplish more than the absolute minimum, that's fabulous! This meeting helps you focus and prioritize your work so that you have the best shot at achieving a critical, near-term goal. Once those minimum achievements are behind you, revisit your plan and take on the next challenge.

4. Create an Action Plan

For every near-term priority, list the next action to be taken, the directly responsible individual who will ensure it gets done, and the expected completion date.

Your action plan should include tasks for documenting this plan and communicating it to everyone who will be impacted by the decisions you've made.

5. Closing Review and Appreciations

That was a lot of work! Review everything you've accomplished by checking that:

- The communication plan for reporting out is complete and accurate
- Every decision is fully documented
- Action items have clear descriptions, individual owners, and due dates when the group will check progress
- Everyone knows when they can expect to hold After Action Reviews and status update meetings to evaluate your results

Then, thank everyone for their time and effort to create the best possible plan in this high-pressure situation.



Useful References

Commanders Intent

"Manage Uncertainty with Commander's Intent" by Chad Storlie for HBR

<https://hbr.org/2010/11/dont-play-golf-in-a-football-g>

"Learning in the Thick of It" by Marilyn Darling, Charles Parry and Joseph Moore for HBR

<https://hbr.org/2005/07/learning-in-the-thick-of-it>

These two articles from Harvard Business Review both briefly describe Commander's intent. The second article focuses primarily on the value of After Action Reviews, which is the complementary meeting to this meeting. I highly recommend reading "Learning in the Thick of It" to get a feel for how excellent teams use these meetings to succeed in highly complex situations.

Exercise: Pre-Mortem

<https://www.lucidmeetings.com/glossary/pre-mortem>

Gary Klein is credited with invention of the pre-mortem as we know and love it today. At Lucid, we use the pre-mortem exercise in several meeting designs because it works so well. This glossary entry provides a brief introduction to the exercise and links to several articles with more detail about the science behind this technique.

There are many ways teams can work through lists of possible plans and narrow these down to a few of the most promising ideas. The exercises recommended in this guide were selected because they're easy to understand and can be completed quickly by a single individual working alone or by a team working together.

Exercise: Stop-Start-Continue

<https://www.lucidmeetings.com/glossary/start-stop-continue>

Exercise: Min Specs

<http://www.liberatingstructures.com/14-min-specs/>

The Lucid Guide to Planning Meetings

<https://www.lucidmeetings.com/meeting-types/planning-meetings>

Learn more about this kind of meeting and see alternative meeting templates.