

EXERCISE: ACTION PLANNING WITH POST-IT-NOTES®

BY
LANCE DECKER
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Objectives – To learn how to use sticky notes in creating action plans.

The following exercise illustrates a way to use Post-it-Notes® in developing action plans that identify, using with graphic group methods, the sequential steps, responsible parties and delivery dates that will get projects completed. The hands-on feature of this exercise makes it appropriate for all ages and occupations. Everyone, no matter how sophisticated in project management, can learn something from this simple, practical process.

Driving Questions – “What are the specific steps in planning and executing a two-week August vacation to New York City?”

Materials and Time – Two packs of 3X5 sticky notes for each small group, markers, pens, and a clean surface on which to place the sticky notes. A vertical white board is best, but the tops of work tables, flip charts and easels, or butcher paper will work as well. If you have them available, storyboards, index cards and markers work even better.

This exercise can take as little as twenty minutes, or as long as an hour to complete.

Before the Exercise –

- Assemble several packets of 3X5 sticky notes and markers/pens for each group to use in creating the action plan.
- Provide a clear space for each group on which to place their completed sticky notes. Make sure that all members of the group can see the notes, once posted.
- If there are more than ten people participating in the exercise, split the group into two or more smaller groups.

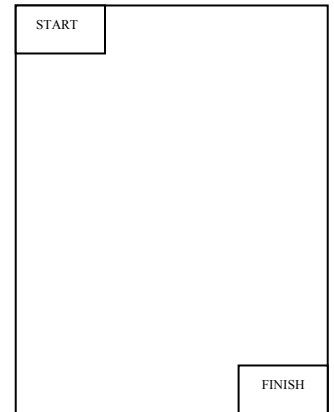
Instructions –

Step 1: Exercise Instructions

- Introduce yourself and the exercise to the group.
- Explain that by the end of the exercise, each group will have 1) identified the specific steps that need to be taken in planning and completing a vacation trip to New York City in August, 2) the sequence of activities, 3) the person responsible for doing each of the steps, and 4) the date each of the steps is to be completed. At the end of the exercise the group will discuss the dynamics of the process and how they might apply this technique in their own organizations. Have the group select a leader to facilitate discussion and present the group's findings.

- The boundaries for this “vacation” include, but are not limited to, the following:
 - You and your spouse both work outside the home.
 - You own a home and a dog.
 - The mail comes daily as does your newspaper.
 - You can leave no earlier than Saturday, August 5th and must return no later than Saturday, August 20th.
 - You have a limit of \$5000 to spend on all aspects of the trip.
 - You have decided to drive the family car which needs no repair or maintenance.
 - You have a traditional family consisting of a woman (36), a man (38), a son (10) and a daughter (14).

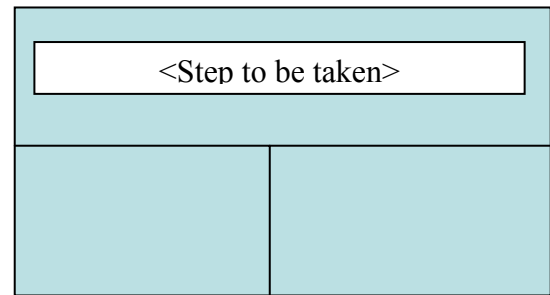
- The group may want to make additional assumptions about the trip as the exercise proceeds.



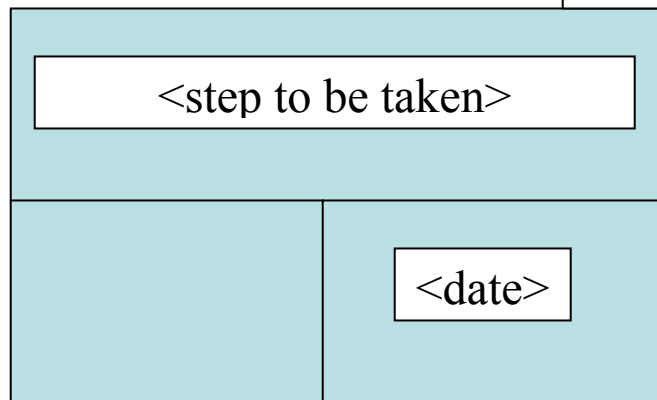
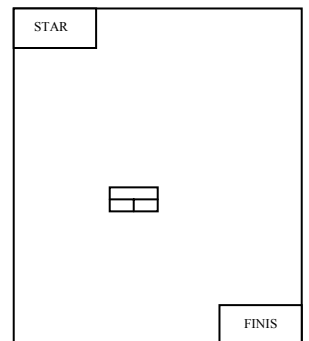
Step 2: Brainstorming & Sequencing

Before the group begins brainstorming, have each group label one sticky note “START” and another “FINISH.” Place the note marked “START” in the upper left hand corner of the white board or flip chart...and the note labeled “FINISH” in the lower right hand corner. Place today’s date on the “START” card, and August 20 on the FINISH card.

Refer to the driving question and explain to the group that they will first brainstorm and document each of the steps needed to take a vacation. As they consider the steps, they must record each on its own individual sticky note, as illustrated, to the right. Place the notes on the white board or flip chart just to display what has already been captured. No sequence or order should be assigned to the way the notes go on the surface at this time. Just identify and record as many steps as possible. Remember, each step gets its own card.



After the group has brain stormed the driving question for five minutes, ask them to start placing the sticky notes in sequence. Place the actions that need to be taken earlier toward the upper left, actions needing to be taken toward the end of the trip toward the lower right. Work from left to right and from top to bottom. In posting the notes, leave some room for additional steps that were not identified during the first round of brainstorming.

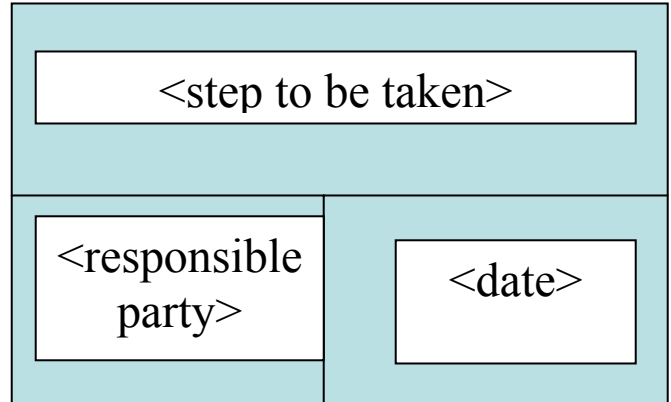


Step 3: Assigning Completion Dates

After all of the sticky notes are properly sequenced, have the group leader read each and ask the question, “When does this action need to be completed?” As the group decides the completion date of the action, take the felt-tipped marker or pen and place that date in the lower right hand corner of the sticky note. (See illustration to the right.)

Step 4: Assigning Responsible Parties

After all sticky notes are properly dated, have the group leader read each note, again, and ask the question, “Who is responsible for taking this action, or seeing that it is completed?” As the group decides the responsible party, use the felt-tipped marker or pen to place that name in the lower left hand corner of the sticky note. (See illustration to the right.)



Step 5: Assessing Completeness

After all sticky notes are completed, have the group leader ask the questions, “Did we forget anything? If we do all these things, will we successfully complete our vacation within the boundaries we’ve set?” If the group thinks of additional steps needed to assure success, place those actions on sticky notes with completion dates and responsible parties, and insert them into the plan.

Step 6: Exercise Assessment

The action plan is now completed. (See illustration to the right) Have each group leader describe the challenges that their group had, and share what they learned about action planning in small groups. Challenges might include participants trying to share their ideas and not being recognized, participants with conflicting ideas of how to proceed, individual dominance of the process, lack of engagement by individuals, unanticipated revisions, or multiple conversations being disrupting. Things learned might include the importance of assigning a date before assigning the responsible party, leaving room for additional actions, writing clearly to assure understanding, shared leadership, and the role of the facilitator.

