

THE

WEEKLY

PLANNING

PROTOCOL

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INTRODUCTION

I believe that the job of a leader is to deliver the results that their team, function or business is striving for AND to look after the people that they have been given the responsibility to lead. If we achieve huge success at work but go home to our loved ones stressed-out and irritable then that is not true success.

If we drive our team relentlessly hard to deliver at work, but cause them to be unhappy with a knock-on effect on their families, then we cannot call ourselves a true leader.

I believe that we need to press the reset button in order to win at work, support those that we lead and strike the right balance for ourselves.

We don't need to adopt a fundamentally new set of leadership skills though. Instead, we simply need to focus on doing the basics brilliantly well, with ruthless consistency.

This toolkit will help you do just that.

In the pages that follow you'll find a simple framework that will help you achieve a number of things:

- Take back control of your days and weeks
- Provide you and your team with more clarity and focus
- Stop wasting time on ineffective meetings
- Delegate in a way that empowers and inspires those that you lead

HOW TO USE THIS TOOLKIT

My suggestion for getting the maximum value from this toolkit is to follow these four simple steps.

- 1.** Read through the toolkit now and absorb the content.
- 2.** Print off the toolkit and block 45 minutes in your diary to go through it again. This time think more deeply about the content and write down your answers to the questions.
- 3.** Schedule specific actions in your diary based upon what you have learned.
- 4.** Share the toolkit with your team.

THE WEEKLY PLANNING PROTOCOL

SCAN



PLAN



MEET



DELEGATE



Actively look ahead to anticipate challenges and identify new opportunities.

Block time in your diary for this mission-critical leadership activity.

Focus on leading by example and delivering world-class meetings.

Enable and inspire those that you lead to execute the plan.

THE LEADERSHIP MOVES...

Make the game-changing shift from reactionary fire-fighting, to pro-active leadership.

Move from super-manager to inspiring leader by allowing yourself the time to slow down, in order to speed up.

Use the appropriate number of great meetings, at the right time, as an enabler of peak performance.

Tell your team what needs to be achieved, why it is important and then trust them to work out the how.

STEP ONE - SCAN



Look two weeks ahead.
What must you do this week in order to be on the front-foot next week?

INSIGHT:

In the British Army, the planning and execution of any project is always split between two people in a continuous cycle.

When faced with a new mission or project the Operations Officer (leader) works with a small team to formulate the plan.

They then brief the team focusing heavily on the desired outcome and where the project fits into the bigger picture. This approach, often referred to as “freedom within a framework” ensures that their team can adjust the plan without constantly seeking approval from their boss.

Once the project has started, it would typically be handed over to a subordinate to deliver and monitor. This approach “frees up” the leader to look ahead and begin planning the next project or anticipate challenges that may lie ahead.

Stepping back in this way also allows the leader to maintain a big-picture overview of the current project without micro-managing their team. This gives them the ability to step-in and provide support as and when required.

The alternative to this approach is one that is familiar to many over-worked and over-stretched managers.

By trying to manage everything, we create a situation where we are constantly micro-managing, fire-fighting, and responding to the most urgent task, which is not necessarily the most important task.

ACTION:

Answer these questions and act on your answers in the next 24 hours.

1. When will you allocate time to looking two weeks ahead in order to plan and anticipate.



TOP TIP -

Allocate time in your calendar and set it as a recurring event. Make it sacrosanct. This is a mission-critical leadership activity.

2. What must happen in order for you to do this?
3. What could get in the way or prevent this from becoming a new habit (the blockers)?
4. What strategies can you put in place to negate the impact of these blockers?
5. Who must you engage or get support from in order to install this new weekly planning protocol?

The weekly scanning protocol provides a game-changing shift from reacting and fire-fighting to planning and anticipating.

MY NOTES



STEP TWO - PLAN



Create a plan.

Planning and preparation reduces our tendency to instinctively react in an emotionally charged, unhelpful way.

INSIGHT:

One of the most limiting beliefs that many leaders have is thinking that they need to have all of the answers and come up with all of the solutions.

I'm fortunate that I learned this lesson when I was just 15 years old and it has stayed with me ever since.

It was a cold February morning and I was intensely focussed on doing what I had to do in order to become an Officer in the Army.

I was wearing a pair of trainers as I walked the mile to school so as not to muddy the highly polished shoes that I carried in my school bag. I held my trousers up the whole way there to prevent them from getting dirty, as on that day I was being interviewed by a Major from the Army Recruiting Team.

A full eight years later I found myself in Northern Kuwait just a few kilometres south of the Iraq border receiving a set of orders. My mission was cross the breach, 24 hours behind the first wave of US Marines and provide security to the only port in Iraq. A key strategic objective for the coalition forces.

At the time I was a 22 year old Troop Commander leading 30 soldiers with anywhere between one and twenty years experience in the Army. In contrast, I'd spent just 11 months at Sandhurst learning the basics of my craft followed by three months on the Platoon Commanders Battle Course.

Nothing that I had learned or practiced on the bleak, windswept training areas of Warminster and the Brecon Beacons had prepared me for this mission. This felt very different.

It was a daunting task.

In that moment I suddenly remembered sitting opposite the recruiting Major, aged just 15, in my school Careers Office. I can still remember his words as if it were yesterday:

"Ben, always remember that as a leader you do not need to come up with all of the answers, all of the time."

As his words echoed in my mind, it became clear what I should do. I would take my most experienced Corporal, Joe Rushbrook, with me as part of my advanced party. We would head to the port first, carry out our reconnaissance and I could tap into his years of experience so that we could formulate a plan together.

And that is exactly what we did.

The truth is, leaders do not need to have all of the answers.

Involving your team or specific individuals in the planning process does not weaken your position as a leader. It strengthens it immeasurably.

When we ask our team for help and seek their opinion it sends a very clear message that says:

1. I value your input.
2. I know that you may have better ideas than me.
3. I trust you.

Planning is a mission-critical leadership activity that we must consciously and intentionally allocate time to. Sometimes it is necessary to create the time and space to think by ourselves, free of distractions.

At other times we must include others in the process.

STEP TWO - PLAN

ACTION:

Answer these questions and act on your answers in the next 24 hours.

1. When can you block out planning time in your diary?



TOP TIP -

As in the scanning phase, allocate time in your calendar and set it as a recurring event.

MY NOTES

2. Think about when and where are you at your most productive. Now use this insight when allocating planning time in your diary.
3. Consider how you can balance the need to minimise distractions whilst planning with the need to support your team.

WHEN AM I AT MY MOST PRODUCTIVE?

WHAT TIME OF DAY? BEFORE OR AFTER WHAT ACTIVITIES?

WHERE AM I AT MY MOST PRODUCTIVE?

THINK ABOUT THE ENVIRONMENT AND PHYSICAL SPACES.

HOW CAN I USE THESE INSIGHTS TO CREATE A **PEAK-PERFORMANCE STATE** THAT WILL ENABLE ME TO PLAN EFFECTIVELY?

STEP THREE - MEET



When we focus on leading great meetings, there's less time wasted and less frustration. We have more time and energy to do the work that matters and fulfil our true potential, as individuals, as a team and as an organisation.

INSIGHT:

The quality of what your team, department or business produces is a direct reflection of the briefings and meetings that you personally deliver.

Poor meetings, lacking in clarity and focus with little attention to time-keeping, always translate into projects delivered late, and below the required standard.

All too predictably, the first things to get dropped when teams are busy or under pressure are team meetings and briefings. Whilst this is a common stress reaction, it is totally counter productive.

The best teams in the world do the exact opposite. They don't just maintain the current meeting schedule when under pressure. They actively increase it.

This ensures that everyone has the most up to date, mission-critical information. It means people are totally clear on the priorities and are ready, willing and able to support their colleagues.

The main difference between great teams and average teams is simply this,

"Great teams focus on doing the basics brilliantly well with ruthless consistency, day in, day out."

Team meetings and briefings are one of the mission-critical basics for any team.

"Great leaders do not test for understanding by asking for questions. Great leaders test for understanding by asking questions."

Ben Morton, Founder of Ben Morton Leadership

THE COST OF BAD MEETINGS:

Imagine ten people have a meeting for one hour and the average salary of those attending is £55,000. That meeting will cost around £400.

Now consider the fact that many organisations require a manager to sign-off expenditure or personal expenses in excess of £300, yet we allow anyone to call a meeting! Crazy right?

Bad meetings destroy productivity.

An appropriate number of great meetings, at the right time, accelerate performance exponentially.



TOP TIP -

Ask questions to ensure understanding.

No matter how many times you ask if there are any questions at the end of a meeting, many people will hold back.

They will hold back because they are afraid of looking stupid in front of you and their peers.

Even if this isn't their primary concern, highly intelligent people regularly leave meetings with entirely different views on what was agreed.

In the military we used a specific tactic to overcome this. At the end of a briefing – we would always **ask questions of our team** to ensure clarity and alignment.

We never sought clarity by asking our team if they had any questions.

WORLD-CLASS MEETINGS



ACTION:

Use this simple checklist to deliver world-class team meetings and briefings:

PLAN

Meeting Preparation

- Do we have a clear agenda AND are we clear on the goal for each agenda item?
- Have we invited the correct people? Ensure that those that must be there are, and those that don't need to be there aren't.
- Have we given attendees enough information in advance?
- Have we considered the meeting process? I.e. decision making and idea generation strategies.
- Have we taken care of the logistics?
- Will the physical environment enable us to be at our best? If not, what must we do in order to access a peak-performance state?
- Have we given ourselves and our team sufficient time between meetings?

DO

Conduct the Meeting

- Have we allocated "check-in" time at the start of the meeting to allow attendees to clear their heads from previous meetings and focus on the current one?
- Have we managed distractions? Phones away, laptops closed etc.
- Have we assigned key roles? Facilitator, time keeper, note/action taker, devils advocate.
- Have we ensured that everyone is contributing and that nothing is being left unsaid?
- Have we asked questions at the end of each agenda item to test for shared understanding?
- Is everyone 100% clear on Next Steps, Responsibilities and Timings?

REVIEW

Meeting Follow Up

- Immediately share any mission-critical information with those not in the meeting – where appropriate.
- Publish next steps as soon as possible.
- Complete next steps and/or plan time to follow up on them.
- Review the meeting process as the start point for planning the next meeting.

WORLD-CLASS MEETINGS



INSIGHT:

MEETING GOALS

Poorly defined goals are one of the major reasons why so much time is wasted on ineffective and frustrating meetings.

Every topic on a meeting agenda should have a clearly defined and specific goal.

The person leading the discussion on that topic should begin the discussion by stating what the goal or outcome for the discussion is.

Meeting goals typically include:

- Sharing Information – that must be done in person in order to ensure understanding
- Advance the Thinking – developing new ideas
- Provide Input – to allow a decision to be made at a later date
- Make Decisions – where a joint decision is required
- Improve Communication – where something is not working, could be better or to clear the air
- Build the Team – by celebrating success, taking time to connect and focusing on how the team is working

THE CHECK-IN

The Check-In is another powerful yet often overlooked tool for building a true high performance culture. Once again, it focuses on slowing down in order to speed up.

At its most basic, a check-in allows those in the meeting to share what's on their mind – whether it's work related or not.

We're not just busy, successful leaders. We're human beings too. If you do not acknowledge these thoughts and feelings, they will distract you in the meeting.

What's more, if our mind is elsewhere then those in the meeting with us will often misinterpret our behavior and make false assumptions.

Some common check-in questions are:

- Before we get started, what's on everyone's mind?

OR

- In order to focus on this meeting, what do you need to put aside for now?

Credit to Sam Kaner
Facilitators Guide to Participatory Decision Making

STEP FOUR - DELEGATE



A leader's job is to set the vision and then create the environment that allows and inspires their team to make it a reality.

INSIGHT:

Much of what we know about delegation comes from the Management Theory developed during the industrial revolution.

This was a time when organisations sought to get the maximum productivity from their employees on a production line in a factory. We have continued to apply much of this outdated management theory to the "knowledge workers" in an office environment. At the same time we scratch our heads wondering why our people aren't more engaged.

One of the reasons for this lack of engagement stems from how leaders delegate tasks.

The most common approach is to tell people "what" needs to be achieved and "how" to do it. The problem with this is that it provides people with very little freedom and autonomy, which we know leads to low levels of engagement.

The alternative approach is to adopt the British Army's concept of "Mission Command". Essentially this focuses on telling people what needs to be achieved, why the task is important and the boundaries within which they must operate.

Once you've done this, get out of their way and let them work out the how for themselves.



TOP TIP -

Ten minutes spent on better delegation always prevents hours of wasted effort and frustration.

ACTION:

Poor Delegation
The Micro-Managers Approach

What...
needs to be done



How...
to do it

Mission Command
A tool for effective delegation
The Inspiring Leaders Approach

Why...
it needs to be done and why
it is important

What...
needs to be achieved and what
good looks like

The Boundaries...
within which you must operate.
Time, budget, authority.

"Never tell people how to do things. Tell them what to do and they will surprise you with their ingenuity"

General Patton

MISSION COMMAND TEMPLATE

WHAT

WHAT NEEDS TO BE ACHIEVED:

WHAT GOOD LOOKS LIKE
(QUALITY, STANDARDS ETC)

WHY

WHY WE'RE DOING IT AND WHERE IT
FITS INTO THE BIGGER PICTURE

BOUNDARIES

CONSIDER TIME, BUDGET, RESOURCES
AND LIMITS OF AUTHORITY

MY NOTES



YOUR LEADERSHIP MENTOR

BEN MORTON

About me

I'm a leadership mentor and performance coach with a unique background. As a former Captain in the British Army, I have led people in life or death situations.

My experience has taught me that leadership is both a great privilege and a great responsibility. Fundamentally, I believe that leadership is less about the tools and models and more about understanding what it truly means to be a leader.

For the past 10 years, I've had the privilege of working with senior leaders to help them lead their teams to great success. I have a track record of helping CEO's turn-around dysfunctional teams that they have inherited and moving executive teams from good to great.

The difference between me and other leadership mentors is my personal experience. I've lead teams on expeditions around the world and my experience spans from the battlefield to the boardroom.

I believe that great leaders take care of more than just what happens when they're at work. I help them to consider all aspects of life to strike the right balance and achieve peak performance, personally and in work.

I have published several books, including the multi-category Amazon best-seller **Mission: Leadership – Lifting the Mask.**

Working with me

I work with senior leaders and their teams to take every aspect of how they lead to an entirely new level. I also offer a 1-2-1 Performance Coaching programme for senior leaders.

If you're serious about being the best leader you can possibly be and taking every aspect of your personal and professional performance to an entirely different level, you can apply for one of only 5 Leadership Mentoring and Performance Coaching places available each year.

Get in touch to find out more and let this be the start of something great!

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“ My sessions with Ben were insightful, encouraged me to think in new ways and challenged me on a number of levels, that when combined with the practical tools I'm using outside the sessions have had a very positive impact upon me as a person and leader. Ben's personal style is a key strength and as a coach, or in leading courses, this is a strength that makes people want to work with him.”

Phil Lander - Head of B2B
Samsung Europe