THE COMPLETE LEADER

COACHING GUIDE

PLANNING & ORGANIZATION

The ability to create and use logical, systematic processes to achieve goals.



LEADERS ARE CLEAR THINKERS

One of the 25 leadership competencies

SECTION 01

WHY PLANNING & ORGANIZATION MATTERS

Planning & Organization is one of the 25 core competencies that define a complete leader. As you grow this capability, you'll notice real shifts in how you lead yourself and influence others.

This guide is built for a 90-day journey. You'll explore the foundations, assess where you stand today, practice new behaviors, sidestep common traps, and track your progress, at your own pace or alongside a coach.

WHAT STRONG PLANNING & ORGANIZATION LOOKS LIKE

- You evaluate and allocate human and material resources to accomplish a goal
- You anticipate probable effects, outcomes, and risks before they arrive
- You work effectively within established time frames and priorities

> **REFLECT**
>
> *Why does Planning & Organization matter to you personally? How might developing it change your effectiveness as a leader?*

SECTION 02

FOUNDATIONS OF PLANNING & ORGANIZATION

THE DEFINITION

The ability to create and use logical, systematic processes to achieve goals.

Like any skill worth mastering, Planning & Organization rests on a few core building blocks. Understanding them gives you a vocabulary for your own growth.

THE CORE ELEMENTS

1 **Breaking down the situation**

Systematically evaluating the separate, relevant components of a situation, then using them to produce the desired result. People who struggle here have difficulty deciding which steps to take.

2 **Prioritization**

Ordering tasks for optimum productivity. Remember the 80/20 rule: you can be 80 percent effective by achieving 20 percent of your goals, but only if you accomplish the critical 20 percent each day.

3 **Contingency and follow-through**

Developing plans that minimize waste, error, and risk, then monitoring implementation and adjusting as needed.

REFLECT

Which element feels most familiar? Which one feels like a stretch right now?

SECTION 03

YOUR STARTING POINT

Before you move forward, take an honest look at where you are today. Read each statement and mark how often it's true of your leadership.

I make time for planning even when time is of the essence, knowing a good plan saves time later.

☐ Never ☐ Sometimes ☐ Often ☐ Always

I keep a single calendar and a single prioritized to-do list for all my professional and personal activities.

☐ Never ☐ Sometimes ☐ Often ☐ Always

I build leeway into my plans so higher-priority work doesn't derail them.

☐ Never ☐ Sometimes ☐ Often ☐ Always

I bring the people whose support I need into the planning process early, rather than after the plan is set.

☐ Never ☐ Sometimes ☐ Often ☐ Always

I break a large piece of work into specific tasks with owners and deadlines.

☐ Never ☐ Sometimes ☐ Often ☐ Always

I monitor a plan while it is being carried out, and adjust it as conditions change.

☐ Never ☐ Sometimes ☐ Often ☐ Always

REFLECT

Looking at your answers, where is your greatest opportunity for growth? What patterns do you notice?

SECTION 04

PLANNING & ORGANIZATION IN PRACTICE

Competencies grow through deliberate practice. Work through the activities below in order, or choose the ones most relevant to your context.

ACTIVITY 01 60 min

Volunteering to Learn

Take part in a planning process and watch how experienced planners work. Join one full planning session.

TRY IT

1. Find a new project, procedure, or event being planned in your department and attend the planning meetings.
2. Observe how others structure the work, sequence decisions, and assign responsibility.
3. If you participate, ask someone you trust to monitor your participation and work output.

ACTIVITY 02 40 min

Taking Action

Examine a project you let slip, and a stalled one you could move.

TRY IT

1. Write why a recent project slipped between the cracks, what action could have rescued it, and who could have helped.
2. For a project stagnating now, name the key decision-makers and when you can hold a kick-off meeting.

3. Decide what resources you can offer, what others must contribute, and how you'll keep people actively involved.

ACTIVITY 03 60 min

Project Planning

Plan a project that involves multiple resources and significant time, end to end.

TRY IT

1. Name the project, set a deadline for the plan itself, establish a budget, and determine how it fits organizational objectives.
2. List up to five critical goals plus as many less critical ones as you can, then prioritize by importance, relationships, and timelines.
3. For each goal, assign who participates and their deadline, then confirm the plan with your manager.

ACTIVITY 04 10 min

The Daily To-Do List

A carefully considered, prioritized list every day is the core discipline of this competency.

TRY IT

1. Each day this week, write a carefully thought-out to-do list.
2. Prioritize every task as urgent, less urgent, or not urgent.
3. Re-evaluate the list and add new tasks as they come up.

ACTIVITY 05 30 min

Break Down Your Job

You can’t plan work you haven’t itemized.

TRY IT

1. List at least ten tasks or components you must complete to do your job correctly.
2. Categorize each as daily, weekly, monthly, or less often.
3. Build the recurring ones into your calendar so they stop being decisions.

ACTIVITY 06 30 min

Review a Finished Project

Reviewing how you planned is what improves the next plan.

TRY IT

1. Choose a recently completed project and review how you approached it.
2. Determine specifically how you could have planned it better.
3. Re-evaluate your current goals to be sure they remain in line with your organization’s priorities.

SECTION 05

COMMON PLANNING & ORGANIZATION TRAPS

As you practice, watch for these common pitfalls. Naming them now makes them easier to catch in the moment.

01 **Procrastination**

Procrastination is the art of keeping up with yesterday while putting off tomorrow. Make organization a part of each day rather than a recovery project.

02 **Living in the now**

Spending all your time solving current problems and attaining immediate results leaves no room for planning your future successes.

03 **Multiple calendars and scattered lists**

A calendar per activity is a prime way to over-schedule and confuse yourself. One calendar, one to-do list.

04 **Planning without the people**

Those whose support you need are far more likely to feel invested if they helped build the plan. Bring them in early.

REFLECT

Which trap feels most familiar? How will you stay aware of it as you practice?

SECTION 06

YOUR 90-DAY PRACTICE

Lasting change comes from a few focused habits, practiced consistently and tracked honestly. Build your plan below, on your own or with your coach.

CHOOSE YOUR THREE HABITS

Based on everything above, which three habits will make the biggest difference in growing your Planning & Organization over the next 90 days?

1 _____

2 _____

3 _____

BUILD IN WEEKLY ACCOUNTABILITY

Write questions you can answer each week to measure progress and surface obstacles. The best ones are answered with “yes,” “no,” or a number.

Q1 _____

Q2 _____

Q3 _____

Accountability partner: who will you share these with?

_____

Completion date: when will you evaluate & celebrate?

_____

Measurements of success

How will you celebrate?

SECTION 07

GO DEEPER

Keep building your Planning & Organization with these resources. Explore them, then capture what stands out to you.

BOOK

The Complete Leader, Ch. 1.3: Planning & Organization

The full framework and examples behind planning and organizing.

PODCAST

The Complete Leader Podcast

Episodes 87, 88 & 89 explore planning and organization.

ONLINE

Planning & Organization competency library

Videos, articles, and podcasts at TheCompleteLeader.org.

CAPTURE YOUR INSIGHTS

As you work through these resources, which ideas most apply to your own growth in Planning & Organization?

KEEP GOING

YOU'VE GOT THIS

Developing Planning & Organization is an investment in yourself and everyone you lead. Return to this guide often: revisit the activities, reread the traps, and celebrate small wins along the way.

Every complete leader started exactly where you are now.