

ORGANIZING & PLANNING

competency



Difficulty



Organizing & Planning

Effective performers have strong organizing and planning skills that allow them to be highly productive and efficient. They manage their time wisely and effectively prioritize multiple competing tasks. They plan, organize and actively manage meetings for maximum productivity.

Level	Performance Indicators and Behavioral Examples
4 Strategic	<ul style="list-style-type: none">• Provides framework for setting priorities across the organization: sets mission, key values and key initiatives that alert others to current important and urgent items.• Effectively handles multiple, often competing company, competitor, customer and stakeholder demands at the highest level.• Establishes efficiency measures for the organization (e.g., metrics within a balanced score card).• Continually communicates changing priorities to the organization at-large to aid others in setting local priorities.
3 Advanced	<ul style="list-style-type: none">• Consistently anticipates problems before they are obvious to others; prevents potential problems from happening.• Is expert at changing priorities as the situation demands.• Designs function and supporting roles to maximize efficiency.• Aligns functional priorities to accommodate organization-wide strategies and objectives.• Manages competing priorities across teams; reassigns and reorganizes to meet needs of multiple teams; anticipates needs and conflicts; overcomes obstacles.
2 Applied	<ul style="list-style-type: none">• Establishes and communicates team priorities based on organization's mission, initiatives and goals.• Trains and develops staff to increase productivity (e.g., teaches time management skills, delegation skills, etc.).• Constantly reassesses the situation to ensure correct priorities; is able to switch gears easily between different issues, changing priorities; continually asks "what is the best use of my time now?"• Maximizes time by creatively using time management tools and techniques; delegates, establishes project plans, holds review meetings, etc.• Holds efficient meetings.• Monitors and prioritizes competing staff assignments to maximize resources.• Communicates changing goals or priorities to the team and helps them reorganize.
1 Elementary	<ul style="list-style-type: none">• Effectively prioritizes, manages and completes multiple tasks.• Meets deadlines based on known, shared priorities.• Completes work assignments on time and at or above expected standards.• Reassesses priorities throughout the day based on needs of the organization.• Makes good use of time management tools (e.g., calendar/planners, task lists, etc.).• Differentiates key issues from distractions for best use of time.
0 Inadequate	<ul style="list-style-type: none">• Is disorganized; does not use time management tools (e.g., no calendar/planner, tracking lists, etc.); can't find things; work area is in disarray; overlooks or forgets commitments; gets lost in details.• Wastes time; uses planning or preparing as a substitute for doing; is often stuck, doesn't know how to begin or move forward; can't figure out "what do I do now?"• Does not produce needed results; misses deadlines; takes far longer than expected to complete assignments; always has a number of unfinished, often old, projects on the to-do list; dumps work to others despite having time to complete it him/herself.• Isn't able to juggle a variety of work requests; can't accomplish a series of tasks; processes tasks sequentially rather than in parallel; takes on too many projects at once.• Prioritizes projects incorrectly (e.g., spends too much time on low priority projects, and fails to address urgent issues).

Significance

Efficiently managing scarce resources (e.g., time, talent, money) equates to profitability. Being productive can create the slack resources needed to move ahead.

Best Ways To Develop

Organizing and planning skills can often be developed through a good time management workshop. A reputable seminar can provide you with the fundamentals of organizing and planning your work.

Improving Your Capacity

Explore available organizing technology. If you aren't leveraging modern tools (e.g., Outlook, Palm Pilots, Blackberries, etc.), you need to!

Read: *Competing Against Time: How Time-Based Competition Is Reshaping Global Markets* by George Stalk

Read: *First Things First: To Live, to Love, to Learn, to Leave a Legacy* by Stephen Covey, Roger A. Merrill and Rebecca Merrill

Read: *How To Be Organized in Spite of Yourself: Time and Space Management That Works With Your Personal Style* by Sunny Schlenger and Roberta Roesch

Activity: Take an in-basket simulation to test your organizational skills. This exercise is an excellent way to learn your time management strengths and weaknesses as well as learn new techniques (contact Organization Systems International).

Start Today

Separate your daily tasks into "A", "B" and "C" priorities. Estimate the time you will need to complete your tasks. Then fill time slots with the appropriate tasks.

Schedule quiet time today (and every day!) to reflect on your task accomplishments and plan best use of time for tomorrow.

If you face an overwhelming task, break it down into manageable pieces and schedule a piece a day to get it done.

Tips

- Use mission, vision and values to help prioritize.
- Take advantage of time management tools.
- Don't plan in a vacuum—involve those who will be impacted by the plan.

Remember, the key to improving competency is not just learning about the skill but choosing a takeaway and developing an action plan to put new behaviors into practice until it becomes a natural response.

Development Action Planning Form

Step 1: Choose a competency area to develop.

Target Competency: _____

Step 2: Describe a positive outcome in the target area of competence; include your vision of a preferred future state.

Goal Statement: _____

Vision Statement: _____

Step 3: List the benefits of achieving your desired end state.

Benefits: _____

Step 4: Brainstorm the actions you might take to achieve your goal. For each, anticipate obstacles and options for overcoming them.

Action Steps	Obstacles	Options
1.		
2.		
3.		

Step 5: Finalize your action steps based on your brainstorming in Step 4. Now, list each action you must take to achieve your goal, including time frames and resources you will need.

Action Steps	Time Frames	Resources
1.		
2.		
3.		

Lipscomb's CORE Competency Development Program helps improve the competency areas that are critical to achieving your life and career goals. Through course materials, suggested practice opportunities and personalized coaching, competency-based education focuses on developing a new set of skills you can apply to daily life. Visit [Lipscomb Online](#) for more information on our Certificate, Undergraduate, and Graduate degree programs.