

# A HIERARCHY OF PLANNING: WHERE YOU START CAN MAKE A DIFFERENCE

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Planning can start anywhere in an organization, but no matter where you start everything that is planned and accomplished should add value to the entire organization and the clients and communities it serves. If this planning alignment is not achieved, failure can result. To better ensure success, a planning hierarchy and a needs-assessment hierarchy are suggested.

THERE IS NO right or wrong place to start planning, but where you do start might determine the probability of getting useful results.

It is increasingly accepted that organizations are means to societal ends, and the extent to which they survive and thrive over time depends on their focusing first on adding measurable value to all partners, both within and outside the organization (c.f. Addison, Haig, & Kearney, 2009; Bernardez & Kaufman, 2013; Davis, 2005; Drucker, 1992; Drucker, 1993; Kaufman, 1992; Kaufman, 1996, 1998; Kaufman, 2000; Kaufman, 2005; Kaufman, 2006a, 2006b; Kaufman, 2011; Kaufman & Carron, 1980; Kaufman, Corrigan, & Johnson, 1969; Kaufman & English, 1979; Kaufman, Oakley-Browne, Watkins, & Leigh, 2003; Kaufman & Guerra-Lopez, 2013). The landscape is littered with organizations that put themselves before their associates and clients, and some even serve prison time.

Are social responsibility—health, safety, and well-being—not primary? Imagine getting on a flight where each employee is not making decisions on what to use, do, produce, and deliver on your arriving alive. It is the ethical and practical responsibility of every organization and everyone in it to focus first on the health, safety, and well-being of all stakeholders (Kaufman, 2011; Moore, 2010).

In practice, planning starts at every level of an organization. If you are on the talent development team, you likely are responsible for individual performance and competence. If you are assigned to resources, your responsibilities are for human, physical, and financial-capital

resources being available, and if you are the top executive you look after the entire enterprise and the value it provides to external clients and our shared society.

Each associate is a member of several teams—your area, your department, and the entire organization. The teams must make sure that all stakeholders are well served, and that is basic for organizational as well as professional success.

## A PLANNING HIERARCHY

Organizations are means to societal ends. Either we add value to society or we falter. There are five linked and aligned levels of planning (see Figure 1).

These *organizational elements*—*Mega, Macro, Micro, Processes, and Inputs*—form a hierarchy of planning. Planning may start at any level of the hierarchy, but the risk varies with where one starts. The hierarchy identifies levels of planning as well as noting that each level is linked and that the ultimate purpose of any organization is to add value to internal and external stakeholders. Each level in the hierarchy should add value within the organization as it moves to Mega, the highest level, which adds measurable value to all.

If one enters planning for a training program, the success of that program lies both in the mastery of learners as well as the contribution that mastery and their performance (Micro) adds to the value to the organization (Macro), as well as to external clients and our shared society (Mega). If one enters planning for organizational

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development, success lies in meeting business objectives (Macro) as well as adding measurable value to all stakeholders, including safety, continuing customer satisfaction, and the organization’s surviving and thriving over time (Mega).

### APPLYING THE HIERARCHY FOR BEST RESULTS

Because every organization, if it intends to have sustainable success, must add value at each level and ultimately to Mega—external clients and our shared society—then where you enter should ensure that the organization links each level in the hierarchy. Every level of the hierarchy is equally important and serves as building-blocks toward Mega. The whole is made up of the sum of its parts as well as contributing to all stakeholders.

There are five appropriate questions you must ask when entering planning anywhere within the hierarchy:

1. **Starting at Inputs.** How confident am I that successful planning for human, capital, and physical resources will add value to each subsequent hierarchical level? What do I risk if that contribution is not made?

2. **Starting at Processes.** How confident am I that successful planning for human and talent development, performance improvement, workplace redesign, incentives, and human resource development will add value to each subsequent hierarchical level? What do I risk if that contribution is not made?
3. **Starting at Micro.** How confident am I that successful planning for achieved competence and skill development and production of desired materials will add value to each subsequent hierarchical level? What do I risk if that contribution is not made?
4. **Starting at Macro.** How confident am I that successful planning for what the organization can or does deliver outside of itself will add value to the subsequent hierarchical level? What do I risk if that contribution is not made?
5. **Starting at Mega.** How confident am I that successful planning for what my organization delivers to stakeholders does add value to external stakeholders as well as organizational ones at each previous hierarchical level? What do I risk if that contribution is not made?

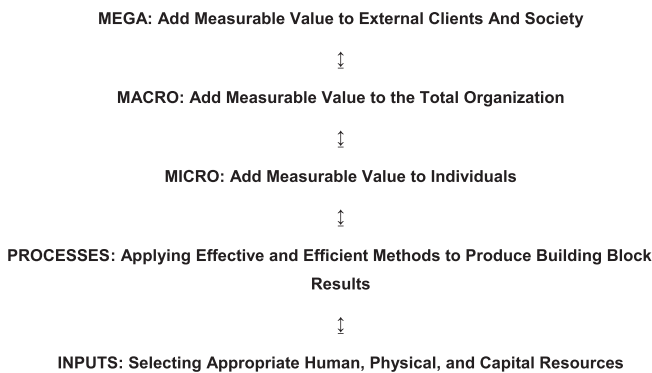


FIGURE 1. A PLANNING HIERARCHY: ALL PLANNING LEVELS ARE VITAL WHILE EACH BEST ADDS VALUE TO THE TOTAL—AND TO MEGA

One example of the importance of linking each hierarchical level is shown with some typical approaches to needs assessment (see Figure 2). This also suggests that there is a needs-assessment hierarchy in which no matter where you start a needs assessment, results should all link and align with Mega.

Planning is just a substitute for good luck. You can improve your chances of defining and delivering valuable results by where you start your planning and the extent to which you formally include all levels of planning with the intention of adding external and societal value.☀

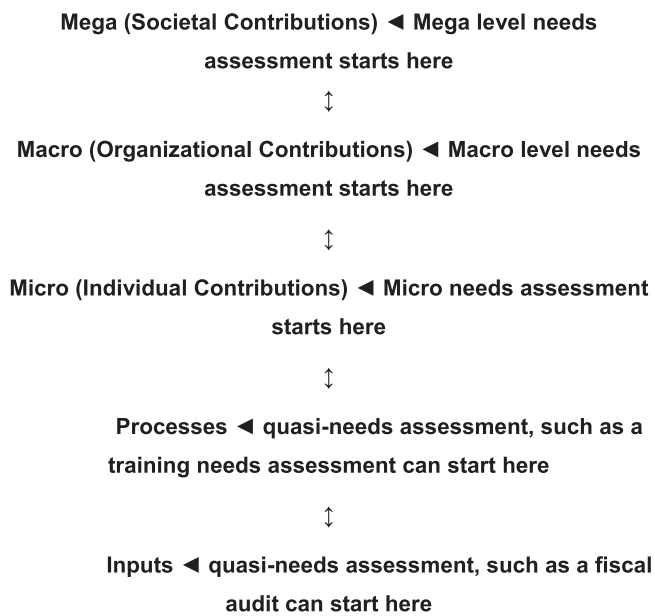


FIGURE 2. ORGANIZATIONAL ELEMENTS, THE PLANNING HIERARCHY, AND THE LINKING OF ALL OF LEVELS WITH AN EXAMPLE OF THREE VARIETIES OF NEEDS ASSESSMENTS; A POSSIBLE NEEDS ASSESSMENT HIERARCHY. A QUASI-NEEDS ASSESSMENT IS A GAP ANALYSIS FOR MEANS, METHODS, AND RESOURCES AND NOT FOR GAPS IN RESULTS

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