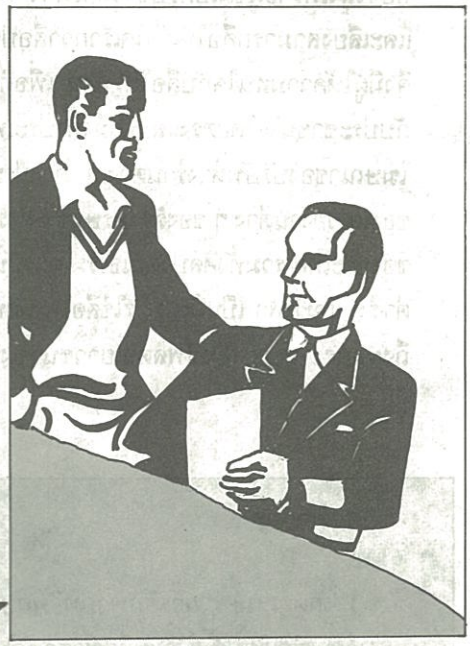
บริหารและบัญชี

# METHODS OF COMMUNICATION PLANNING



**Lertlak Burusphat**

**Planners' workshop**

**Many of the functional problems of organizations are due to the fact that there is little direct attention paid to the process of deciding what is to be done and how to do it. Most organizations just do the work — 'the activity trap'. Work-planning workshops try to draw direct attention to the process of planning, implementing and monitoring/evaluating the work of an organization for all staff. Staff participation in this Process is essential and this helps eliminate otherr lunctional problems in the organization.**

**This chapter describes a method for work planning which the author has developed and used successfully in a variety of communication-planning situations.**

## Definition

A work-planning workshop is a group planning activity involving the staff of an organization or a section of an organization. The overall purpose of this workshop is to achieve optimum results by the organization or section. The specific purposes are to:

Improve the planning knowledge and skills of all staff.

Produce agreements among staff on the process and procefitrd of work planning and, to some extent, implementation and evaluation. These agreements will produce the framework for the procedures and style of the organization's management.

Produce an intermediate-term (three to six months) detailed work-plan. This might also be referred to as a microplan or strategic/logistical-level plan.

## Assumptions

The assumptions are numerous and important; the following are in rough order of priority:

People will be more positively motivated to do their work when they have some say in what that work is and how it is done. People can also do better work when they understand how their work relates to the work

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of others in the organization The workshop makes everyone's work explicit, and it clarifies the overall context in which the individual's work is a part.

The manager(s) must be committed to the process of changing the management system.

The manager(s) of the organization must be willing to delegate authority and responsibility.

National policies/plans and sector (ministry) plans must be realistic and reasonably apecific, because the workplans (the lowest and last level of planning before implementation) are based on these higher-level plans.

This workshop will be the main or only planning activity for the organization/section; therefore, it must be repeated every three to six months.

The work of organization cannot be totally experimental as, for example, in research organizations. If it is, it will be difficult to define realistic objectives. Also, there must be some predictability of the types of tasks involved and the amounts of time involved in completing these tasks.

Use of this technique must be given higher-level clearance if necessary. Part ,of the clearance decision must be an analysis of whether this approach to work planning (and overall management) will conflict with the approach used by other sections or related organizations. If this approach conflicts too much, it is probably unworkable overall.

## History

This activity is based in part on 'management by objectives' (MBO), a planning/management approach started by Peter Drucker in the early 1950s. The practice of MBO through the 1960s was basically a management system based on setting clear objectives, implementation rigorously focusing on their achievement and evaluation based on objective fulfilment. Evaluation should also consider whether the objectives were the right ones or defined realistically. This approach still had higher-level managers making the decisions about the objectives, controlling their achievement and evaluating results (although Drucker did not intend it that way). In the early 1970s, MBO consultants and practitioners started to write about the need for more staff involvement in MBO:

The biggest gap in current MBO implementation is the lack of use of the work unit or team to facilitate the change. Most MBO implementations are based on a one-to-one design, where a superior speaks to each of his subordinates in turn. Virtually no MBO technique even tries to get the full team together—to work out effectiveness areas, objectives, and improvement plan as a group. (Reddin, 1971)

This activity finds the other part of its basis in 'organizational development'. This field started in the mid-1960s and could briefly be defined as the practice of consciously diagnosing organization's structure, function and environment and then making consciously planned changes in the organization to reduce organization problems. This is opposed to the past practice of allowing organizational changes to 'evolve'.

The influence of these two fields/practices will become clear in later sections (see 'Procedures' and 'Case example').

The history of this particular type of workshop started in the Spring of 1978 when our colleague, Jim French, developed some of the basic aspects and tried it out with the Office of the Rubber Replanting Aid Fund of Thailand. We made a number of modifications, and since then the approach has gone into action in Nepal, Bangladesh and other projects in Thailand.

Table 1. Subsystems that influence organizations (from Johnston, 1979)

| | Internal subsystems | | | External subsystems | |
|---|---|---|---|---|---|
| Induvidual subsystem + | Social subsystem + | Operation subsystem + | Administration subsystem + | Client or demand subsystem | Whole organization system |
| Attitudes | Climate | Work flow | Policy | Customer satisfaction | Output variables |
| Self-image | Status role | Equipment | Wage-salary | Service to and reactions of users | Profit/loss service |
| Skills : social, technical | Decision-making management style | Location : physical environment | Promotions Fringe benefits | Constraints-taxes | Costs attendance |
| Life values | Values | Material | Hiring-firing | Law and regulations | Turnover |
| Behaviour | Communication | Work arrangements | Rises | Competition | Commitment |
| Goals : job, career | Work-team goals | Schedules | Budgets | Mass media and publics | Involvement |
| | | | Reporting | Labour | Motivation |
| Self-appraisal | Progress review | | Auditing | Government (state, local, federal) | Quality |
| | | | | Internal factors | |

Table 2. Two kinds of change in organization subsystems

| Subsystem | Directly change | Indirectly change/influence |
|---|---|---|
| Individual subsystem | Skills :<br>Technical : planning Skills<br>Social : working in groups | Attitudes<br>Self-image<br>Behaviour<br>Self-appraisal |
| Social subsystem | Decision-making<br>management style<br>Communication<br>Work-team goals<br>Progress review | Climate<br>Status role<br>Values |
| Operational subsystem | Work flow<br>Work arrangements<br>Schedules | To the extent that the workshop redefines these, they may be influenced :<br>Equipment<br>Location/environment<br>Materials |
| Administration subsystem | | Budgets<br>Reporting |
| Client or demand subsystem | Customer satisfaction<br>Service to and reactions of users | Competition |
| Whole organization | Output variables<br>Profit/loss service | Costs attendance<br>Commitment<br>Involvement<br>Motivation<br>Quality |

## Main uses

Workplanning workshops are used to change organizations. Table 1 shows the subsystems that are functioning in any organization. The work-planning workshop is used to change these subsystems either directly or indirectly. As shown in Table 2, certain elements of subsystems can be changed directly; while others can usually only be indirectly changed or influenced.

## Limits and cautions

1. The workshop is best organized and conducted by a person or group outside the organization the first time or first few times. This is so that initial problems can be 'blamed' on the outsiders. What is more important, outsiders provide the 'excuse' for the manager (in front of all staff) to make these changes.
2. The workshop should not be tried at a time when the manager and/or the staff are deeply involved in some other activity or issue, e.g.- annual budget submissions.
3. The top manager and all other relevant managers should be given complete orientation on the real impact this workshop approach could have. They must all

agree with the basics of the approach or it will not work.

4. It must be made clear to everyone that the system must be given a chance (about one year) in order to determine objectively whether it is suitable for their organization.
5. One of the reasons why item 4 above is true is that the staff's planning skills will probably not be highly developed. Therefore, the first work shop especially should emphasize skill-building and be less concerned with the actual plans.
6. The plan period should probably be no longer than three months for the first one or two workshops. This is because of 5 above. The plan period should probably be no longer than six months, no matter how good planning skills become.
7. Because this activity is done in a short period (two to four days), the first time it is done there is usually no time to apply any other techniques of decision validation for planning purposes. These techniques might other-wise include cost-benefit analysis, cross-impact analysis etc.
8. The mix of participants in the workshop is important. At a minimum, all technical and professional staff of the organization should be involved. Whether clerical and other support staff are involved is optional.
9. If only one section of an organization uses this planning approach, it may be initially more difficult to coordinate work between sections (when that is necessary). This is because the section using the approach will be far better planned than any other. Ideally, this situation would only be temporary. Either other sections should adopt this approach also, or patterns of co-operation would need to shift so that they were viewed by everyone as less problematic.

## Other techniques

One-on-one management by objectives.
Management training, especially focusing on planning.
Organizational development exercises usually conducted or led by a consultant. Job analysis.
Programme evaluation review technique (PERT).

## Product or result

An agreed approach among all staff ofthe organization/section for planning at this level.
Work-plans—one or more plan form for each objective.
Master plan—for the top manager to plot major activities against time.
Individual work-plans—one for each person of the organization.
Monitoring forms—to be filled in during implementation (see Table 3).
Improved planning skills and possibly knowledge of staff and managers.
Clarification/agreements of ongoing planning roles and other management reponsibilities.

## Level of detail and level of confidence

The thrust of the workshop is to get the planning to such a level of detail that the human resources are 'timebudgeted' down to estimates in working days, or even parts of days. Each person's individual work-plan will show what they are to do on every day of the plan period. As the human resources are the most crucial resource in all but highly automated/high-technology organizations, it is most important to plan their use accurately. Objectives are broken into activities, and activities are broken into tasks of sufficient detail so that they can be given estimates of completion time in person/days. Other levels of detail are somewhat optional, especially during the first few workshops. It is helpful, of course, to use this activity to specify other resources (finance, equipment, supplies, facilities) at this level of detail.

With this particular planning approach the level of confidence can be examined in

Table 3. Monitoring form : a specimen format

| | | Was it done on time? | | | How was it done? | | | |
|---|---|---|---|---|---|---|---|---|
| No. | Task No. | Yes | No | If not, why? | Well | Averagely | Porrly | Reasons why |
| ..... | ..... | .... | .... | ..... | ..... | ..... | ..... | ..... |
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two perspectives. First, there is a level of confidence in this planning approach itself by the managers and the staff. This, initially, has little to do with the actual plans produced. Later, after several plan/implementation periods, the plans and their utility in implementation can reinforce confidence in the overall approach. However, if the entire organization is not initially confident that this approach will make their work easier or better in some way, it is of little use to go further. Everyone will make sure that it does not work!

Second, there is a consideration of level of confidence in the plans themselves. In a scientific sense, we would be asking, 'At a given point in time (the day the plans are finished), how accurate are these plans in relation to what is actually implemented?' If that were the issue, then we could say that during the first six to eighteen months the level of confidence would be rather low for most organizations. It will take some time for most organizations to develop the predictive knowledge and skills required. It will also take some time for the organization to begin to have more control of the environment in which it operates. This should happen in most situations through the most aggressive management of planning and implementation that this approach requires.

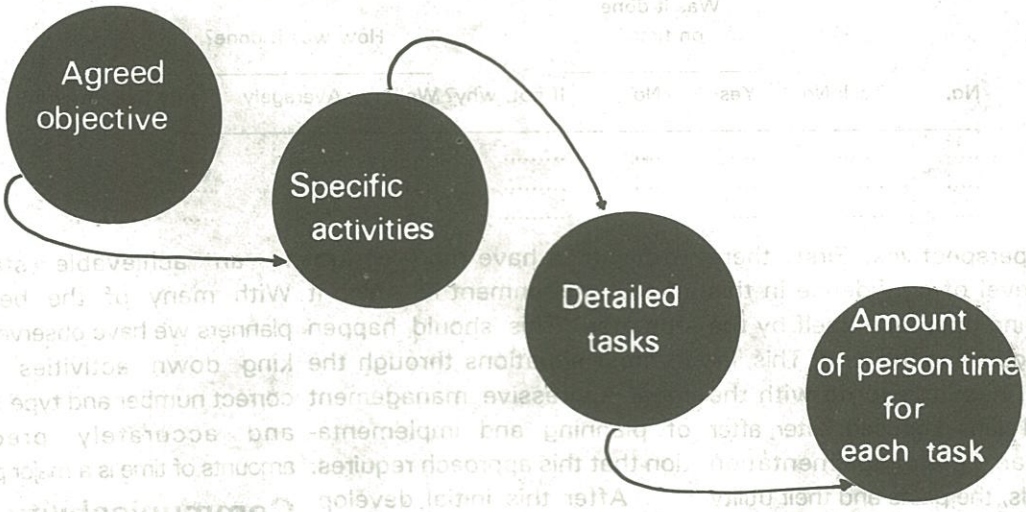
After this initial developmental period (six to eighteen months), an organization should be able to plan with 75 per cent accuracy. This could, of course, be measured in a variety of ways, namely : (a) achievement of objectives ; (b) conformity to schedules ; (c) for objectives that were set, the accuracy and validity of the detailed plans. For an estimate of 75 per cent accuracy, we are referring to the third type of measurement. This is the only fair and realistic measurement for this type of planning, especially for social science work. Given that certain objectives are agreed upon, then the process is as shown in Figure I.

The ability to do this process accurately is the mian capability that one could measure. We have no evidence that our 75 per cent figure in realistic, but for now, with our experience in the workshop, we feel this is an achievable standard. With many of the beginning planners we have observed, breaking down activities to the correct number and type of tasks and accurately predicting amounts of time is a major problem.

## Communicability and credibility of results

The paper results of this planning workshop by themselves would not communicate the essence of the whole planning approach. It would only appear as if an organization/section had gone through a systematic, detailed planning exercise. However, people outside the organization/section have no need to look at these papers unless the entire approach is being explained to them or aspects that pertain to working relationships are being negotiated. The nonpaper results (see section above on Product or result) of the workshop sthemselves have never failed to get communicated to all the staff involved. This is documented in the feedback we have received both during initial workshops and strongly reinforced in subsequent workshops.

The issue of credibility of results here is 'Credible to whom?' For us the primary




issue of credibility is to the organizations/sections that we suggest use this approach. If it works for them, it is credible. We feel we have gone beyond the issue of general credibility —'Does it work at all?' It does work! The only issue is whether a particular group of people think it will work for them. That decisionis always up to them. That decision is always up to them (and it is based primarily on their attitude —not on technical feasibility).

It is noteworthy that we have never done this workshop in exactly the same way. There are a few basics that must be done in order for the approach to work, but many formats and procedures are left up to the organization to decide what best suits their needs.

Span of forecasts. As mentioned above, we feel for this level of planning it is not feasible to plan more than six months at one time. It is not very cost-effective to take several days of all staff's time for planning if the plan period is anything less than three months.

## Resources needed

1. All staff of an organization or section or, as a minimum, all technical and professional staff.
2. For the first one or two workshops, it is preferable to have an outside consultant or consultants to help lead the workshop with the top manager.
3. Sets of national and sector goals and objectives that relate to the work of the organization/section.
4. Some type of visual display, e.g. overhead projector, newsprint pads/felt pens, blackboard.
5. Examples of other work-plans.
6. Possibly, blank planning forms (although it is best in the first workshop to have the group design the type of information required and the format themselves).

## Procedures

The procedures can be grouped into three phases:

This phase, which is only done once, comprises the preliminary organizational analysis (formal or informal) and decision to go ahead with the workshop.

1. Discussions by management, usually with oustside consultant, about problems and needs of the organization.
2. Fact-finding about organizational structure and actual functioning.
3. Decision-making about whe-

ther and when to conduct the first work-planning workshop.

PHASE TWO

1. Collecting all resources required (see above) and making all logistical arrangements.
2. Clarifying the purpose of the workshop to all participants.
3. Giving participants a questionnaire to establish a baseline on their planning knowledge, experience and attitudes.
4. Clarifying/discussing the national and sector policies and objectives which relate to the work of the organization/section.
5. Formulating the programme objectives (the services the organization expects to develop/deliver for their clients).
6. Prioritizing these objectives especially with the plan period (three to six months) in mind.'
7. Defining activities that will be required to achieve the objectives.
8. Breaking the activities down into tasks and assigning each task an amount of time (not dates).
9. Assigning specific staff to each task.
10. Doing preliminary scheduling-assigning specific dates to each task. Optional: the group can also give each activity a general range of time.
11. Defining other resources (equipment, supplies, finance, facilities) and location for each task. Some of these, including the location, may not be seen as needed, especially the first few workshops. These should be left for the organization to decide.
12. Formulating the organizational objectives. The organization must spend some time improving and maintaining itself so that it can better achieve its programme objectives. These objectives would involve activities like: changing the organizational structure, changing/improving management and supervisory practices, staff-training, facility and equipment development, and research and evaluation. These objectives should be clearly defined and planned; therefore, steps 6 to 11 should be repeated for the organizational objectives.
13. Preparing individual work-plans for each person in the organization involved in the workshop. At this point some scheduling may need to be adjusted. Frequently in previous planning steps the same person may have been scheduled to do more than one thing at the same time.
14. Defining the monitoring and evaluation procedures including the type of information to be collected and in what format. These will be maintained during implementation.
15. Preparing a master plan by first deciding on a master-plan format and then filling it from the objective-based work-plan forms.
16. Defining the planning activities that were not completed during the workshop and assigning staff to complete them.
17. Formally and/or informally evaluating the workshop itself and closing it. These steps define the first workshop. During the second and all subsequent workshops steps 2 and 3 could be dropped and 4 could be de-emphasized. Later on (nine to eighteen months later) the questionnaire (with some modification) in step 3 should be given again to compare knowledge, experiences and attitudes more objectively. Steps 2, 3, and 4 would be replaced in later workshops by a step reviewing the implementation during the past plan period. This would be done by reviewing planning forms with monitoring/evaluation forms and facts brought out in discussion.

PHASE THREE: IMPLEMENTATION/MONITORING/EVALUATION

1. Begin implementation of tasks as planned.
2. Maintain monitoring/evaluation information.
3. Make adjustments in plans as conditions change. This could mean even changing some objectives and doing some significant replanning.
4. Plan and schedule the next work-planning workshop. ■

**ผู้เขียน**

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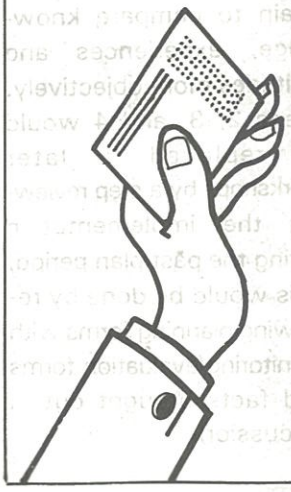

ร่วมกับ

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ธนาคารกรุงเทพ สาขาราชวัตร

ให้บริการชำระค่าลงทะเบียนโดยบัตรบัวหลวง A.T.M.

ผ่านเครื่อง P.O.S. ออนไลน์ สมบูรณ์แบบเครือข่ายครอบคลุม 73 จังหวัด

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