ENGAGEMENT PLANNING GROUND RULES

Short or long-term engagement planning should be guided by a few basic ground rules that you may find helpful as you work to develop plans:

1. **Simple or complex**: A plan can range from an extraordinarily simple action document for an isolated engagement effort, to a more comprehensive, long-term, step-by-step organizing blueprint.

2. **Some grassroots is better than no grassroots**: Recognizing that engagement strategies help produce winning results, it is better to start creating an engagement program immediately – even if the program is very limited at the beginning. Organizations that wait until they are completely “ready” often never get a grassroots program off of the ground. “Don’t let the perfect be the enemy of the good.”

3. **Do a few things well rather than lots of things poorly**: A related but distinct rule. In putting a plan together it is better to start with a limited number of activities, perfect them, and then expand.

4. **Evolution is possible**: The best plans are often structured to allow evolution over time. This increases the chance that the plan will actually be implemented.

5. **Work backwards** from clearly identified goals.

6. **Maximize your advantages** by leveraging existing resources. Minimize your disadvantages by directly addressing identified obstacles.

7. **Assign**:
   a. Dates
   b. Resources
   c. Goals and Deliverables
   d. Strategies and Tactics
   e. Responsibilities
   f. Accountability and Measurements

8. **If you can’t count it, it doesn’t exist**. Goals and hard numbers help ensure that the plan is a realistic reflection of what an organization can accomplish.

9. **If it isn’t written down, it isn’t in the plan**. Nothing can take an engagement program off course faster than good ideas that are not incorporated into the plan or considered during the planning process.

10. **The plan is always the default** - but all plans also need to remain flexible to allow for unanticipated events as well as ongoing innovations.