

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.