



VIRIDIANT business

October 2006
Volume 1, No 5

Newsletter

The **Three-Step** Process

Part 2 of The Learning Effectiveness Series

This series will discuss twelve basic skills and exercises to help you turn them into effective habits. Also provided is a step-by-step planning tool to use any time you are under pressure to plan a project quickly.

To be effective, you need to perform twelve skills on a regular basis. Though many books discuss effectiveness they do not provide the proper format in which to learn these skills. This series will discuss these skills and provide exercises to turn them into habits. The skills are:

1. Choosing your roles
2. Organization of projects
3. Determining your goals
4. Organizing space
5. Managing yourself
6. Finely tuned decision making
7. The ability to prioritize
8. The ability to focus
9. The ability to ignore
10. Conducting regular check-ups
11. Communication
12. Managing the clock

Tools, although necessary, are simply things you purchase. You use tools to be effective. Organizing space is a skill, while a file cabinet is a tool to implement organization. Some people have trouble becoming effective because they do not distinguish

between the two. A file cabinet does its job automatically, as long as you have the skill to file properly. If you do not file properly, your space will not be organized, no matter how many file cabinets you own. It is you who must change, who must learn skills, to be effective.

Effectiveness is best developed over the course of one year. Though the series will be divided into twelve topics, there will be some overlap. It is not possible to discuss how to manage time, without some discussion of how to prioritize tasks. Therefore, when we discuss “How to Prioritize,” we will discuss prioritizing in depth. There is one small problem. In order to learn the skills above you will need some of the other skills. And if one of your other skills is weak, you can’t best learn the skill we are focusing on. That is all right. It’s a bit of a Catch-22, but as you continue the program and improve the later skills, the skills you learned earlier will improve as well.

The Three-Step Process

a.k.a. the A, B C’s of Planning

In time, several of the skills above will be combined to plan most effectively. However, until you learn all the skills, you can use the Three-Step Process to plan projects. This is a basic planning tool that can also be used any time you are under pressure to plan a project quickly. The Three-Step Process requires you to divide a project into three distinct steps:

- a) Planning
- b) Performance and
- c) Deadline.

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“No matter how well you perform the job, if you miss the deadline, the work may be worthless.”

That is how the sequence lines up in relation to time, but in practice you need to change the order to:

- 1) Deadline
- 2) Planning, and
- 3) Performance.

No matter how well you perform the job, if you miss the deadline, the work may be worthless.

If you decide to visit Martha at her new apartment in Manhattan on March 25, before she leaves at 7:00 PM, you need to accomplish three steps: 1) you must gather information i.e. her address 2) perform an action, in this case take a subway or taxi to her apartment and 3) you must complete the action before the deadline. All three steps are required to be effective. If you forget her address, it does not matter how much traveling you do, or how much time you allot. If you do not travel, having her address does not help. If you have her address and travel there, you will not see Martha or her new apartment unless you arrive before 7:00 PM. As obvious as this seems, many people begin tasks before knowing the deadline, gathering information and planning their actions. This is a critical mistake. You always have three to five minutes to plan. The trick to the three-step process is completing the planning table below. Use the table by following the number 1 from the center to right, number 2 from center to right and number 3 from center to right

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The Three-Step Process Planning Table:

Project Title: _____

Order of Steps	Review & Think	Act
2. What information is needed?	Seek Information	
3. Review information & choose action	Perform action	
1. Actual Deadline	Personal Deadline	

Step 1:

Write the actual deadline, 3/25/07 at 6:00 PM in the center column. Always include the year. In a few years, you may open a file and need to know what year you completed a project. Then add some time to account for unpredictable delay. If you decide one hour, you will record 5:00 PM in the column at right.

Step 2:

In the center column, write what information you need, and record places where you can obtain that information. In this case, you require Martha's address, so write "phone book, PDA, or call Martha to ask" in the center column. You also need to know the expected travel time, available on web sites for travel by car or public transportation, in New York City and other major cities. Record these web sites in the center column as well. Now move to the column at right where you perform the actions you chose in the center column.

Step 3:

Review the information (center column) you need to make your decisions. Now choose your travel method and time to leave your hotel, and record them in the center column. Now record the action you need to perform (leave hotel at 4:30 PM) in the column at right. The completed table looks like this.

The Three-Step Process Planning Table:

Project Title: **Visit Martha**

Order of Steps	Review & Think	Act
2. What information is needed?	» Martha's address: phone book, PDA or call Martha to ask. » Travel time: Hopstop.com to learn travel time and expense from hotel by train or bus and mapquest.com to learn travel time by taxi/car <i>Seek Information</i> » Address: Find it, using white pages, PDA, or the phone » Travel time: Go to Hopstop.com and mapquest.com to obtain the information you need.	
3. Review information & choose action:	subway faster (20 mins.) and less expensive. Decide to leave at 4:30 PM <i>Perform action</i> » Leave hotel at 4:30 PM	
1. Actual Deadline	3/25/07 6 PM. Personal Deadline 3/25/07 5:00 PM	

With practice, the three-step process can be completed in five minutes or less for small and even some medium-sized projects. Larger projects will not need to be planned that quickly anyway. Use the Three-Step Process to plan projects, and it will yield rich rewards.

Viridiant is a consulting firm with particular expertise in innovation, strategy, change management, biotechnology, education and healthcare.

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