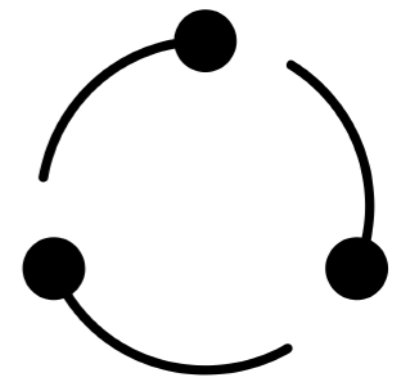# Plan Like A Pro (Lite).

Piecing together essential ideas for effective organising

Section 01
Getting Started

Introduction

Thank you for reading **Plan Like A Pro (Lite)**, a sample of a longer and more detailed document designed to help you improve your decision-making processes, build resilience, and reduce risk.

The four main sections in this free version introduce one concept each with a total of 16 tips on practical and quick implementation. These come from my experience as an Army officer, an Operations Director, a skydiver, and a motorcyclist among others. The format is straightforward, and lets you get right to the action.

If you like what you see, the full version is packed with 50 ideas with a broader range of real-world examples of use. It can be downloaded at the link below.

Get your copy of Plan Like A Pro

To engage Pincheck Ltd in developing personal or organisational understanding and embedding of Business Continuity and Resilience, visit www.pincheck.co.uk to get in touch or write to me at harry@pincheck.co.uk

Harry Joseph

Managing Director
Pincheck Ltd

How to Use this Guide

Each chapter is a brief overview of a concept, some of its practical applications, and a selection of things you might wish to try in your own work. It unambiguous and to the point, providing immediate practical value.
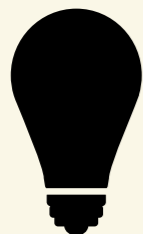
Things you can do: after each concept explanation is a separate page with this heading marked with the light bulb icon shown here. You'll find a selection of immediately-accessible and ready-to-go ideas for use right away.

This is not gospel: it is possible that the experiences and insights related here do not ring true for you or your work. That's okay! I welcome questions and constructive opinions, and you are warmly invited to write to me here: harry@pincheck.co.uk

Section 02
Leadership

What it's all about (START HERE)

Everything in this book stems from leadership, and that's why it's at the start. Strong leadership will result in supportive, productive, and focused teams; you'll find the ideas that follow much easier to implement, and your staff or colleagues will thank you.

What is leadership, though? Picture a leader. If you've imagined a powerful but autocratic figure, a Stalin-like ruler with an iron fist, then you have indeed imagined a type of leader but not the one most people want. You've imagined a *dictator*. In some scenarios – very fast-moving and high-risk situations – you might need some dictatorial qualities: "follow this", "do that now", "take that over there", "fix this", "go go go". But for the most part, and in the longer-term, dictatorships are harmful and undesirable.

The polar opposite might be considered the *pushover*, maybe someone appointed to a leadership position without really understanding what's required. They're a people-pleaser, but making everyone happy usually comes at the cost of inefficiency and a lack of cohesion, as everyone strives to do their own thing in their own way, without effective oversight or guidance. They think they're supporting everyone by being nice and giving everyone what they want, but they're actually making life harder by reinforcing the belief that every individual's desires are equally important and attainable. Simply put, they aren't displaying *leadership*.

What it's all about

Leadership comes in a range of styles, balancing direction, authority, and support. At its best it is free from ego, prioritising the needs of the team in successfully executing the goals they have been set. Good leaders provide clear vision with guidance or goals, allow their teams to act autonomously within specified limits, upholding standards or ideals, and demonstrating through personal example. They demonstrate by example and they are not afraid to get stuck in with their teams.

Leaders are required to make tough decisions, and will not always be wonderful in everyone's eyes, but that's okay because _leadership_ is not _friendship_.

Across different jobs in a range of environments I have been extensively trained in and seen leadership (good and bad) in many different situations. I have been a leader of large and varied teams, and made my own mistakes in this art, but always strived to improve. The following tips are just a starting point for budding leaders, but take them forward with the rest of this book and your journey will be much easier.

What it's all about: Things You Can Do

Listen. Talk with your staff and colleagues. Understand their needs and wants, where they feel they could use more resource or guidance, and where they'd like to be given more freedom to act. People "lower" in a hierarchy are not "less important".

Support. Your role as a leader is to get the team the resources they need to be most effective and deliver success efficiently. Fight for your team's funding, training, working hours, pay, or equipment that will keep them motivated and effective. Be there with them when things are tough, and be kind.

Champion. The best leaders don't have ego. They realise they are already important enough just by being in their position. They promote and give a voice to their teams or individuals, openly praising their achievements and contributions.

Be clear. Good leaders are effective communicators. They are open and frank, do not shy away from difficult messages, and provide unambiguous direction where needed. Try distilling your messages to their roots and stating them with as little fluff as possible.

Section 03

Planning and Organising

Think to the Finish

Too frequently, teams and organisations consider only the main problem in front of them, and how to solve that before moving onto the next or mopping up what remains. Not bad, but far from best.

Let's take the analogy of a simple training exercise: get 100 people and equipment across a series of checkpoints featuring drills or lessons. We could plan the day's events meticulously and that would be fine.
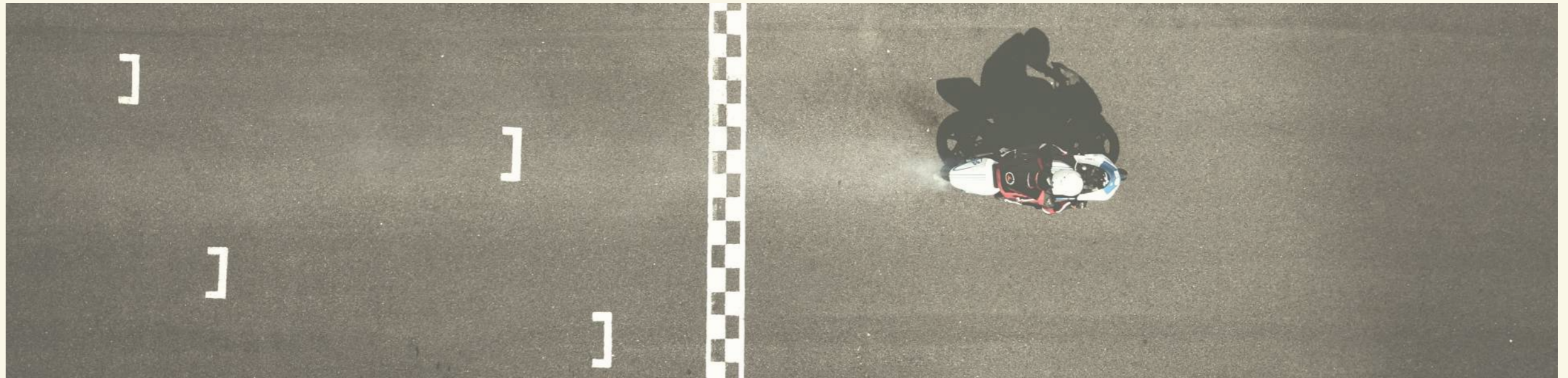
But what happens when the event concludes? Are we gathering feedback immediately, in the days that follow, or both? How does everyone get home safely? And what about any longer-term training objectives which stem from this event? Are we running it again? There are countless other questions we could consider.

To be optimally successful, rather than looking at a problem or objective in isolation we need to think beyond it and work out what comes next. This isn't to say we can't start an activity without having the full plan in place - if the exercise lasts a month, there's more time to finesse the detail of the recovery plan and feedback sessions - but the trick is to consider them from the beginning, and not tack them on as an afterthought.

Think to the Finish: Things You Can Do

Use a framework of "what next?": ask this question after each stage of the plan, up to a sensible and well-defined conclusion (the start of the next plan, return to Business as Usual, etc).

Encourage group input: planning isn't just for those in designated leadership or management roles; invite input from the wider team, especially those actually doing the planned work.

Early considerations: the sooner you note aspects of the plan, the sooner you can put draft actions into place. There's no need to work out fine details at the beginning, but placeholders and notes on the timeline will help key thoughts from being lost as the main activity ramps in intensity.
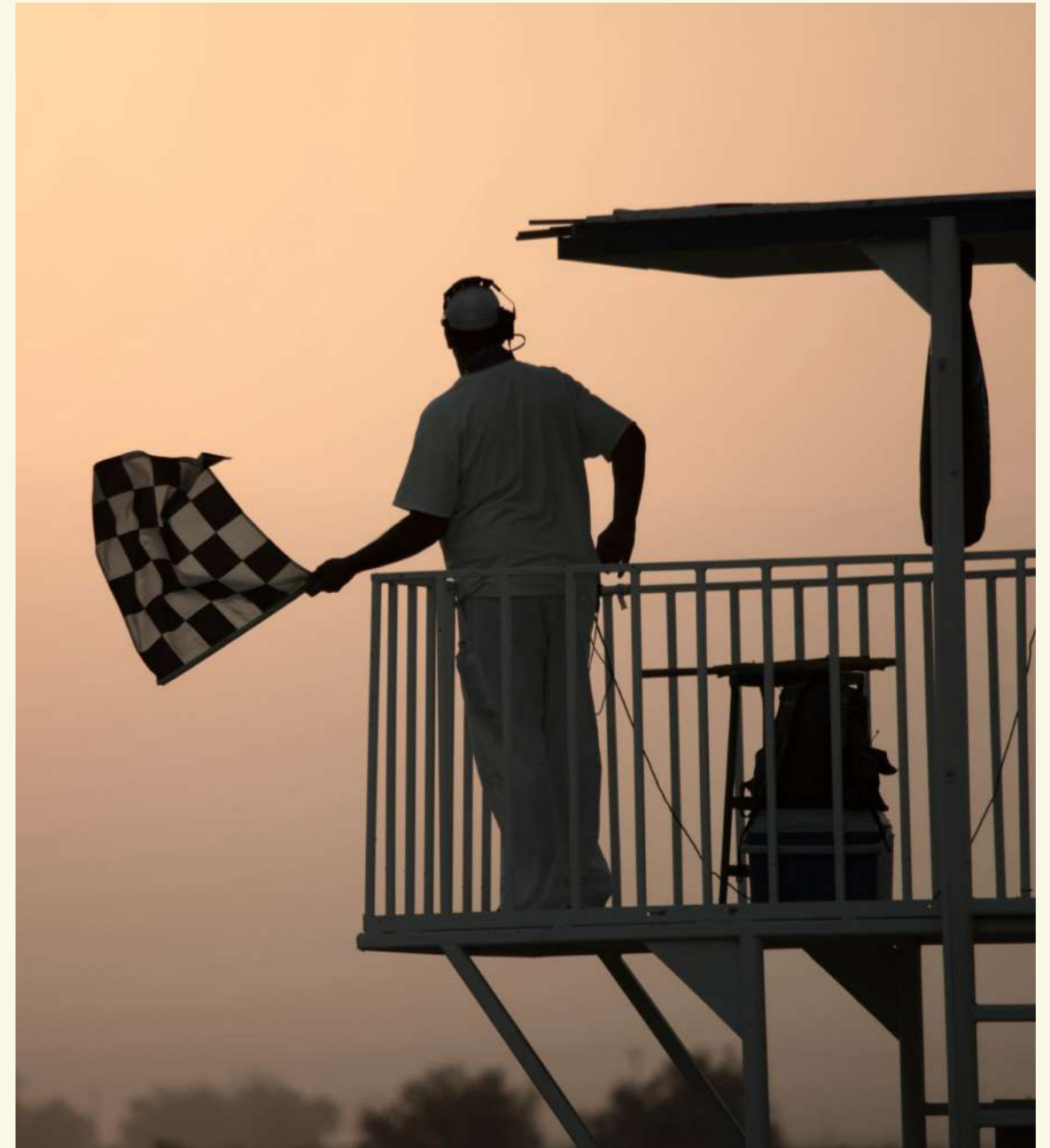
Section 04

Communication

Every Man A Link Man

Communication is vital, but how do you get your messages and ideas where they are needed, on time? How do you receive feedback or answer questions?

In the military, a "link man" goes between different groups relaying messages, obtaining and passing information up and down chains of command. The concept is extended ("every man a link man") so that each individual is responsible for this, not just the designated "link", thus boosting the internal messaging power of a platoon up to 30x.

Applying this to the civilian world, "links" can be formed in a number of ways, including meetings (coordination groups, morning calls, daily wrap-ups), forums, shared working areas, messaging platforms, and even informal chats over coffee and at lunch.

Passing messages around a company depends on the sensitivity of work being performed but the foundation of an open, collaborative, and highly informative culture is vital.
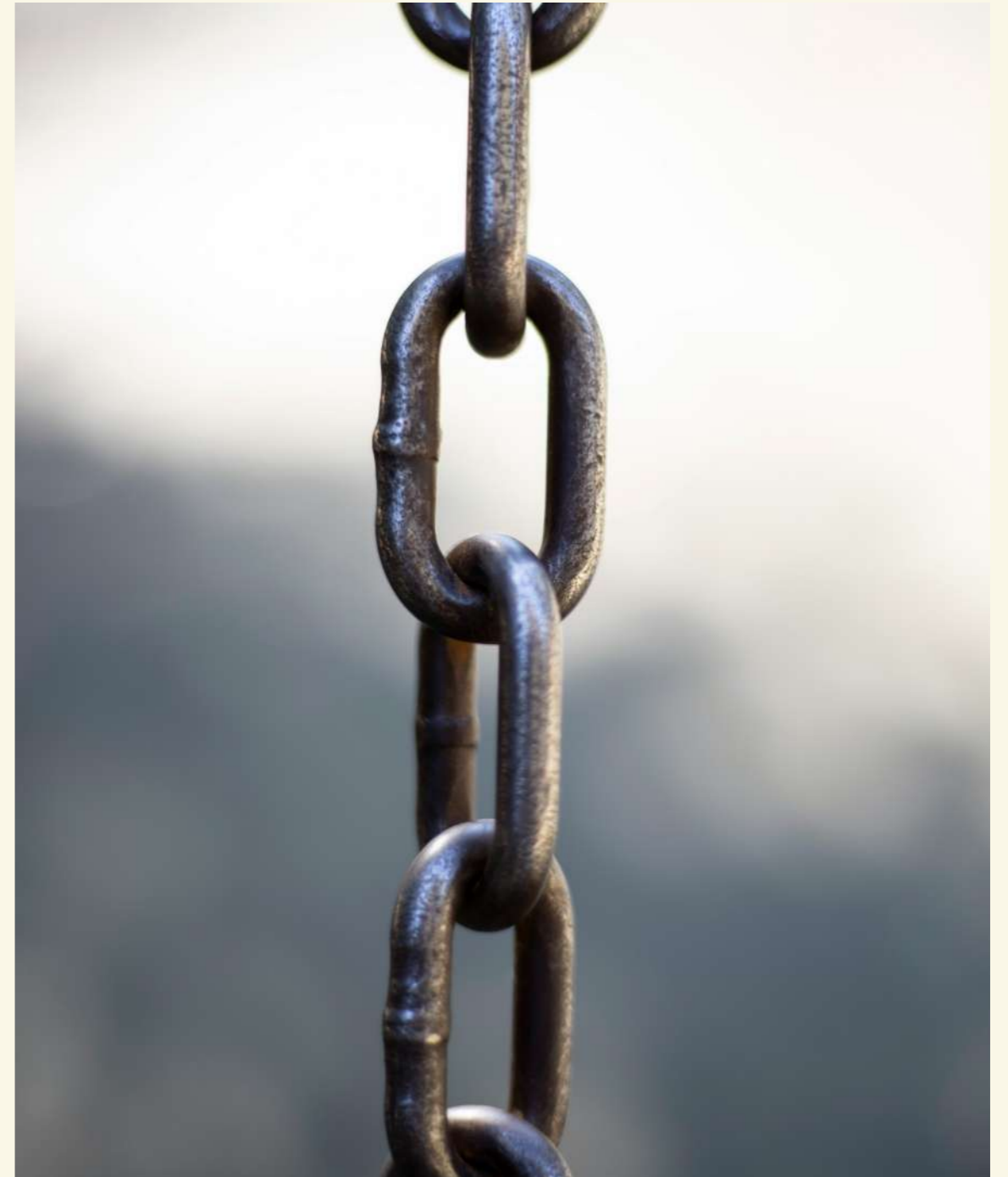
Every Man A Link Man: Things You Can Do

Baseline your current setup: establish, through staff in your organisation themselves, what is or isn't working and where they would like to see improvements.

Empower: create a more open culture with regards messaging and information sharing where appropriate, enabling all members of staff to participate.

KISS: keep it simple and don't overload people with systems and software. Messaging and communicating needs to be easily accessed, easily digested, and easily contributed-to. Select a couple of methods to quickly unify teams and reduce confusion.

Section 05

Alignment

Standard Operating Procedures (SOPs)

Common throughout high-risk organisations, SOPs unify and streamline processes, so they can be easily understood and followed by all staff. Clear in their guidance or direction they can be relied upon as defaults in stressful situations.

Examples readily applicable to many environments:

• Placement of first-aid equipment in fleet vehicles or across offices, properly communicated to all staff.

• The order in which to escalate the reporting of common incidents, systems to log data, people to call, levels of authority required to release funds, etc.

• The clothing or equipment worn and used by members of the team. See this explanation of the US Navy's aircraft carrier crew colours. (Photo opposite).

• Safety controls for access to specific equipment, or to verify the absence of personnel from a dangerous space (e.g.: group lockout / tag-out boxes or tabs).
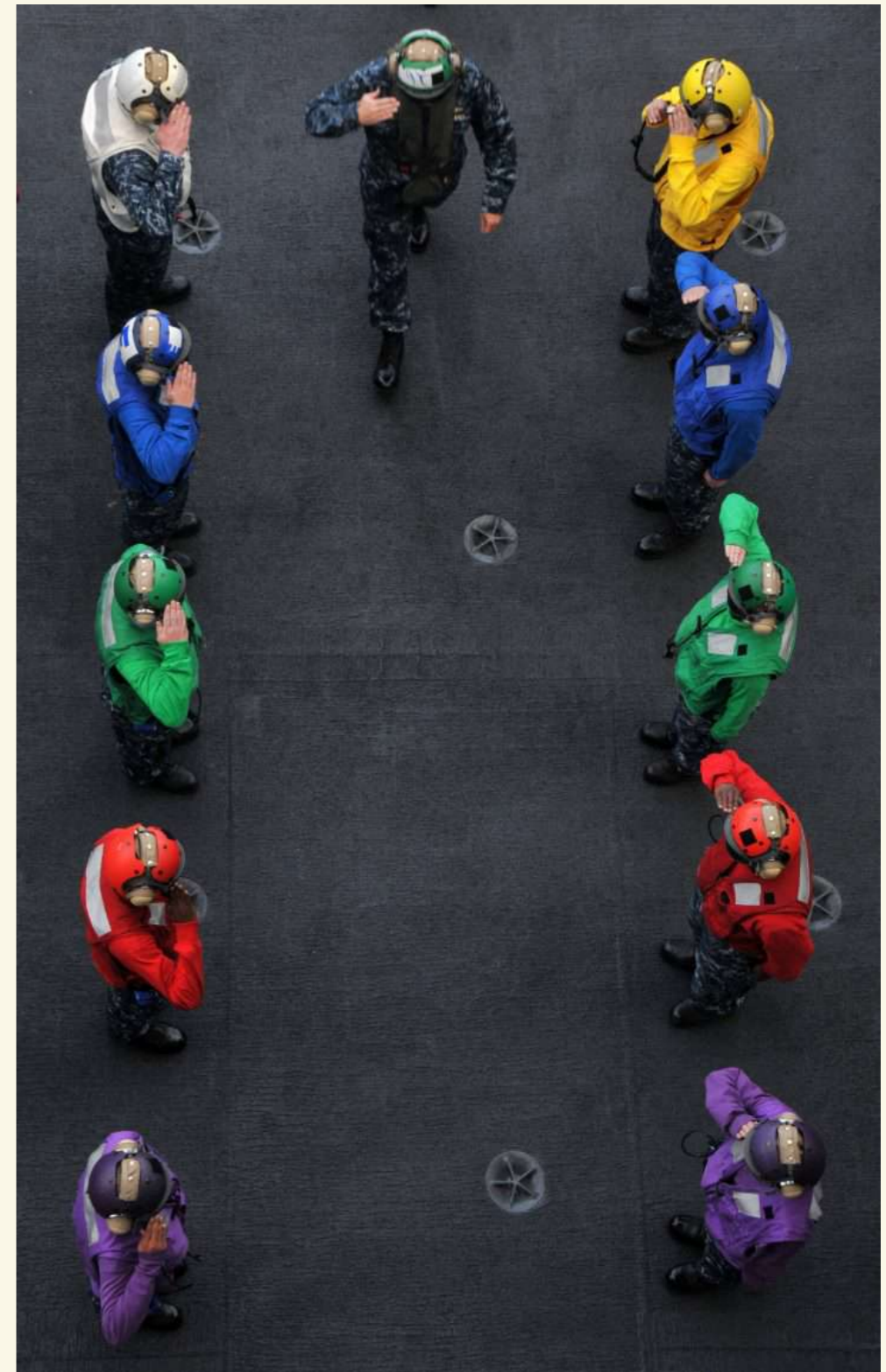
Standard Operating Procedures (SOPs): Things You Can Do
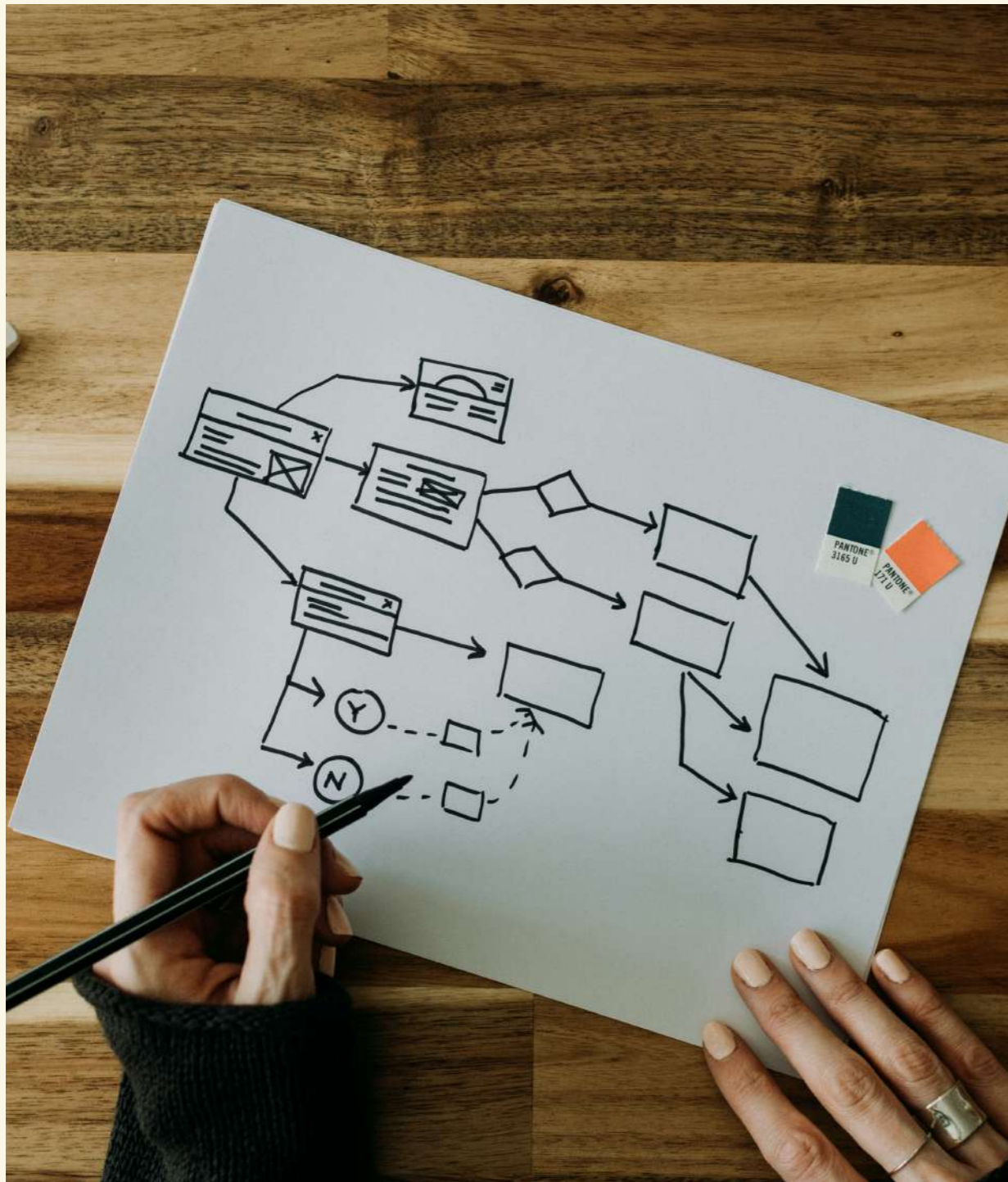
Establish SOPs with your team: Work with staff to create simple, easily-followed processes for your most common practices and most likely faults.

Implement and embed the SOPs: Through training, rehearsals, and spot checks, make sure staff are actually using the procedures you designed. There's no point having them if you aren't going to use them!

Include SOPs in inductions: The most important procedures should be taught to all newcomers in your organisation, so they are aware and aligned from the beginning.

Review the SOPs: ensure the procedures are continually and regularly assessed for suitability, practicality, adherence to best practice, and so on. There's no point using outdated or unnecessary procedures.

The Pincheck

Throughout this guide I have talked at some length about the importance of trust, of reducing the chance of error through uniform processes and clear communication, and of checking progress or quality in various forms and at various stages. The pincheck represents this very neatly.

To conduct a pincheck, a skydiver inspects the pin and fabric loop holding a main parachute container closed, verifying their condition, free from sharp edges or fraying respectively, that they are neither too loose nor tight, and that everything is routed correctly. Five seconds to prevent avoidable mishaps. Crucially, the check is performed twice: once before boarding (see The Flight Line Check) and again just before leaving the plane.

Dislodging a pin during the ride to altitude is quite possible, and a resulting premature deployment could easily harm other jumpers or even bring down the plane. This second check is a quick-and-easy means of making sure fatal errors are avoided. It takes seconds, is easily implemented, and has no disadvantages. What's not to like?

The pincheck does not disregard all the checks which went before. In fact, it assumes they have been performed satisfactorily. It serves simply to inspect the single most likely and most dangerous element which might negatively impact the most people if overlooked.


Here, the closing pin tucked into the bridle above itself, and didn't dislodge when needed. The skydiver was forced to use their reserve parachute for an error which a quick check would have resolved.

The Pincheck: Things You Can Do

Find your pincheck: Consider the single final inspection you would make before committing to a task. Is a particular valve or seal of critical importance? Is the absence of a backup electricity supply a total showstopper? Do you have this embedded in your processes and checklists, and are your staff following them?

Consider Pincheck Ltd: I hope in reading this far that you have found something of value and interest. Pincheck Ltd would be delighted to bring the experience and knowledge summarised in these pages to your organisation and develop its approach to leadership, planning, safety, and continuity. Do get in touch.
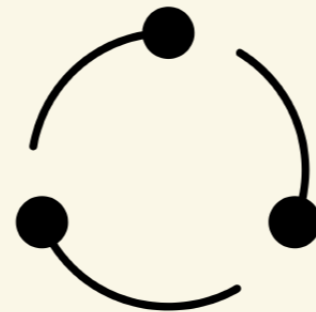
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Section 06

Thanks

Thank You

I would like to extend my sincere thanks for your time in reading this guide.

I hope it has provided insight and practically useful ideas which you can implement quickly and easily.

Comments, suggestions, feedback, and requests to work together are all welcome. Please email me directly at the address below to give me your thoughts. I look forward to hearing from you.

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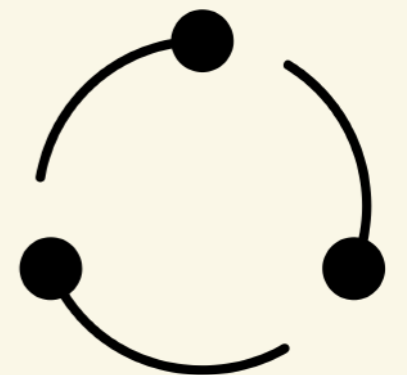
Credits and Acknowledgements

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Glen Rushton (Unsplash) for the race finish image

Felicia Montenegro (Unsplash) for the linked chain image

Hugo Jehanne (Unsplash) for the signal flare image

99percentinvisible.org for the flight deck crew image

Kelly Sikkema (Unsplash) for the flowchart image

Deleted Reddit user for the closing pin image