



## “What’s Your Plan?” – A Quarterly Emphasis

*By Brad Schow, COO, HTG*

At HTG, June is the time for our yearly Facilitator Training, Advisory Council meeting and company StratOp Renewal. We are planning to put things in motion for calendar year 2018. If we start any later than this we miss hitting key timelines for Vendors, our business and budgeting planning process for the next year, and messaging rhythms around our quarterly meetings. HTG has been going through a “curve jump” as it relates to Business Planning and Messaging.

Curve jumps are not always easy. They take more resources and time than it seems they should. I used to think our marginal time would be enough to catalyze the necessary change, but not anymore. Having gone through the StratOp process for three years now, we’ve learned that we must dedicate the right time, treasure and talent (the three T’s) to the things we want to change, or they simply don’t happen.

Each quarter has an emphasis on planning. In Q2, we had each member build a Legacy Plan using a new template. In Q3, each member will build a Life Plan based on the content of their Legacy Plan. These all lead us to our Q4 Business Plan review for 2018. And, in Q1, we will work together to build a Leadership Plan, which outlines how to build necessary leadership skills to accomplish goals.

So why is planning important? Several reasons:

- **Start with the end in mind.** We start with the Legacy Plan to ensure we’re helping you build the life and business that you want; not only for today, but to also accomplish your legacy goals.
- **If you can’t write down where you’re headed, how can you build a team to help?** If you don’t have a plan, your team is forced to react to changing priorities or, even worse, fill in the vision vacuum with their own conclusions. Writing down the vision makes it real and it becomes a target people can rally around.
- **If you don’t have a plan for where you want to go, how can your HTG group and facilitator help you?** It is easy to come to a meeting and talk about the current “pressing need.” But in reality, your group can’t give you the feedback you need to hear because they aren’t sure what you are trying to accomplish.

Here at HTG, we are building our plans so we can improve our service to you and help you achieve your goals. We will then vet those plans with the Advisory Council and communicate with our facilitators so they can help you create and accomplish your plans.

These plans will then be what we execute against as a business in 2018. As we improve our planning process and “curve jump” in our ability to plan and execute; we are inviting you to join us. Planning can be an awkward process to learn to do well. Ultimately, it is a rewarding one that is key to deliberately building a business and a legacy. So, as we train our facilitators this month, look forward to hearing them ask you “what’s your plan?”