

GETTING THINGS DONE!



INSTRUCTOR GUIDE

1-DAY COURSE

DEVELOPED BY JAMES P. EICHER

HRDQ[®]

GETTING THINGS DONE!

Copyright © 2009
Published by HRDQ
2002 Renaissance Boulevard #100
King of Prussia, PA 19406

Phone: (800) 633-4533
Fax: (800) 633-3683
Web: www.HRDQ.com

No part of this publication may be reproduced or transmitted in any form or by any means except as permitted under HRDQ's End User License Agreement, and the 1976 United States Copyright Act (17 U.S.C.) sections 107 and/or 108. Inclusion in any publication, whether for commercial or non-commercial purposes, is prohibited. Requests for permission to reproduce or reuse this content outside the terms of the End User License Agreement, should be addressed to permissions@hrdq.com or (610) 279-2002

For additional Reproducible Program Library licenses please contact the HRDQ Client Solutions Team at (800) 633-4533

The material in this publication is provided "as is." HRDQ disclaims any warranties, expressed or implied, regarding its accuracy or reliability, and assumes no responsibility for errors or omissions. To the extent permissible by law, HRDQ accepts no liability for any injuries or damages caused by acting upon or using the content contained in this publication.

Version 1.0

ISBN 978-1-58854-559-6

Reproducible Program Library—End-User License Agreement

IMPORTANT! PLEASE READ!

The following terms and conditions are a legal agreement between Organization Design & Development, Inc. DBA HRDQ (“HRDQ”) and You, Your organization, its subsidiaries, affiliates, and legal partners (“You”) regarding the Reproducible Program Library (“RPL”).

You may use the RPL only in accordance with the terms of this agreement as set forth below.

1. License Grant. HRDQ hereby grants You a non-exclusive and non-transferable license to download, reproduce, customize, and otherwise make use of the RPL within the terms of this agreement.
2. Proprietary Rights. The RPL is the sole and exclusive property of HRDQ and/or its authors including all right, title, and interest in and to the RPL. Except for the limited rights given to You herein, all rights are reserved by HRDQ.
3. Term. This Agreement is effective upon acceptance, and will remain in effect in accordance with the term of the license purchased. The specific term of this Agreement is defined on the sale invoice provided You at the time of purchase and available thereafter from HRDQ.
4. Authorized Use of Library. For the term of this license, You may:
 - (a) Store the RPL on a computer,
 - (b) Amend, edit, and change the RPL provided that all original copyright notices, and trade and service marks, remain intact and appear on this agreement and amended versions and reproductions thereof,
 - (c) Print and distribute paper copies of the RPL for educational or training activities, whether with direct employees, students, agents, or clients, and,
 - (d) Resell the RPL, in whole or in part, provided You have a current reseller agreement with HRDQ.

You may not:

- (a) Translate, reverse engineer, decompile, disassemble, or create derivative works based on the RPL,
 - (b) Include the RPL, in whole or in part, in any publication, product or service offered for sale,
 - (c) Lease or loan the RPL,
 - (d) Distribute the RPL through the means of a removable storage medium, such as CD-ROM or DVD,
 - (e) Copy or upload the RPL onto any bulletin board service or public Internet site, or,
 - (f) Sublicense or reassign this license.
5. Termination. Failure to perform in the manner required in this agreement shall cause this license to automatically terminate and HRDQ may exercise any rights it may have. Upon natural expiry of the term, unless renewed by You with HRDQ, access to the download site will be denied and all passwords rendered inactive. Upon termination, for whatever reason, You must destroy all original and amended versions of the RPL, in any and every format, and certify as such, in writing, to HRDQ upon request. All provisions of this license with regard to the protection of the proprietary rights of HRDQ shall continue in force after termination.
 6. Warranty. The RPL is provided “as is.” HRDQ warrants that the RPL does not violate any copyrights, trademarks, trade secrets, or patents of any third parties. HRDQ disclaims all other warranties, expressed or implied, regarding its accuracy or reliability, and assumes no responsibility for errors or omissions. To the extent permissible by law, HRDQ accepts no liability for any injuries or damages caused by acting upon or using the content contained in the RPL. If any part of the RPL is defective in workmanship or materials, HRDQ’s sole and exclusive liability, and sole and exclusive remedy for You, shall be replacement of the defective material. HRDQ’s warranty shall survive the termination of this agreement. Some states do not allow exclusions or limitations of implied warranties or liability in certain cases, so the above exclusions and limitations may not apply to You.
 7. Permissions. Any other use of the RPL not defined in this agreement is subject to the written approval of HRDQ.

HRDQ, 2002 Renaissance Blvd. #100, King of Prussia, PA 19406, 610.279.2002, www.hrdq.com.

Instructional design and learning philosophy

We are committed to providing the best core-skills content possible for Instructor-Led Training (ILT). The following principles are applied in the development of programs:

Sound Instructional Design

All course content is developed using a variety of research techniques. These include:

- Brainstorming sessions with target audience
- Library research
- Online research
- Customer research (focus groups, surveys, etc.)
- Subject Matter Experts (SMEs)
- Interviews with trainers

Expert instructional designers create imaginative and innovative solutions for your training needs through the development of powerful instructional elements. These include:




- **Learning objectives** provide effective tools for managing, monitoring, and evaluating training
- **Meaningful connections** between the topic and students' past, present, and future
- **Appropriate organization** of essential ideas helps students to focus on what they need to know in order to learn
- **Modeling techniques** demonstrate useful behaviors and problem-solving skills
- **Active application**, the cornerstone to learning, helps students immediately apply what they have learned to a real-life situation
- **Consistent** instructions and design help students learn and retain new information
- **Accelerated learning techniques** create interactive, hands-on involvement to accommodate different learning styles

Application of Adult Learning Styles

Adults learn best by incorporating their personal experiences with training and by applying what they learn to real-life situations. Our experienced instructional designers incorporate a variety of accelerated learning techniques, role-plays, simulations, discussions, and lectures within each course to appeal to all learning styles and ensure that the ideas and information will be retained.

Course Activities

Course Introduction

Type of Activity	Segment	Time
	Course Objectives	5 minutes
	Who Is This For?	5 minutes
	What's YOUR Situation?	20 minutes




Self-Assessment



Reading

Chapter One: Stuck in the Middle!

Type of Activity	Segment	Time
	Introduction	10 minutes
	The Case for Change	5 minutes
	Thinking It Through and Getting the Buy-In You Need	5 minutes
	Taking Decisive Action: Delivering on Your Commitments	5 minutes



Facilitator-Led Activity



Group Activity




Lecture

Course Activities, continued

Chapter One: Stuck in the Middle!, Continued



Self-Assessment

Type of Activity	Segment	Time
	Getting Unstuck: Roadblocks to Success	15 minutes

Chapter Two: Direction




Reading


Type of Activity	Segment	Time
	Introduction	5 minutes



Facilitator-Led Activity


	Self-Assessment: What's your Direction?	10 minutes
---	--	------------



	Characteristics of Clear Direction	10 minutes
---	------------------------------------	------------



Group Activity

	Enabling Clear Direction	15 minutes
---	--------------------------	------------








	Tools for Action: Envisioning the Future	20 minutes
---	---	------------



Lecture

Course Activities, continued

Chapter Three: Priorities

Type of Activity	Segment	Time
	Introduction	5 minutes
	Self-Assessment: What are your Priorities?	10 minutes
	Characteristics of Urgent Priorities	10 minutes
	Establishing Clear Priorities	15 minutes
	Tools for Action: Prioritizing with "Sticky Dots"	20 minutes



**Self-
Assessment**



Reading



**Facilitator-
Led Activity**



Group Activity



Lecture

Course Activities, continued

Chapter Four: Planning



Self-Assessment



Reading








Facilitator-Led Activity



Group Activity








Lecture

Type of Activity	Segment	Time
	Introduction	5 minutes
	Self-Assessment: Are You Planning?	10 minutes
	Characteristics of Successful Planning	10 minutes
	Planning for Success	15 minutes
	Tools for Action: Mapping Out Milestones	20 minutes

Course Activities, continued

Chapter Five: Engagement

Type of Activity	Segment	Time
	Introduction	5 minutes
	Self-Assessment: Are you Engaged?	10 minutes
	Characteristics of Healthy Engagement	10 minutes
	Getting Engaged	15 minutes
	Tools for Action: Radio WIIFM, "What's In It for Me?"	20 minutes



Self-Assessment



Reading



Facilitator-Led Activity



Group Activity



Lecture

Course Activities, continued

Chapter Six: Execution



Self-Assessment



Reading








Facilitator-Led Activity



Group Activity








Lecture

Type of Activity	Segment	Time
	Introduction	5 minutes
	Self-Assessment: Can you Execute?	10 minutes
	Characteristics of Flawless Execution	10 minutes
	Planning for Success	15 minutes
	Tools for Action: Mapping Out Milestones	20 minutes

Course Activities, continued

Chapter Seven: Accountability

Type of Activity	Segment	Time
	Introduction	5 minutes
	Self-Assessment: Who's Accountable?	10 minutes
	Characteristics of Shared Accountability	10 minutes
	Knowing Who Is Accountable for What Performance	15 minutes
	Tools for Action: Creating the Scorecard	20 minutes



**Self-
Assessment**



Reading



**Facilitator-
Led Activity**



Group Activity



Lecture

Course Activities, continued

Chapter Eight: Getting It Done!



Self-Assessment



Reading



Facilitator-Led Activity



Group Activity



Lecture

Type of Activity	Segment	Time
	Getting Things Done: Phases of Action	10 minutes



Getting Things Done:
Course Review

10 minutes

Contents

Licensing agreement	iii
Instructional design and learning philosophy	iv
Course Introduction	
Course Objectives	xvii
Who is This For?	xvii
What's YOUR Situation.....	xviii
Chapter One: Stuck in the Middle!	
Introduction.....	2
The Case for Change	3
Thinking It Through and Getting the Buy-In You Need	4
Taking Decisive Action: Delivering on Your Commitments	5
Getting Unstuck: Roadblocks to Success	6
Chapter Two: Direction	
Introduction.....	8
Self-Assessment: What's your <i>Direction</i> ?.....	9
Characteristics of Clear Direction.....	10
Enabling Clear Direction.....	11
Tools for Action: Envisioning the Future.....	12
Chapter Three: Priorities	
Introduction.....	14
Self-Assessment: What Are Your <i>Priorities</i> ?.....	15
Characteristics of Urgent Priorities.....	16
Establishing Clear Priorities.....	17
Tools for Action: Prioritizing with "Sticky Dots".....	18

Chapter Four: Planning

Introduction.....20
Self-Assessment: Are you *Planning?*.....21
Characteristics of Successful Planning22
Planning for Success.....23
Tools for Action: Mapping Out Milestones.....24

Chapter Five: Engagement

Introduction.....26
Self-Assessment: Are You *Engaged?*.....27
Characteristics of Healthy Engagement28
Getting Engaged.....29
Tools for Action: Radio WIIFM, “What’s In It For Me?”30

Chapter Six: Execution

Introduction.....32
Self-Assessment: Can you *Execute?*.....33
Characteristics of Flawless Execution.....34
Executing the Game Plan.....35
Tools for Action: RACI.....36

Chapter Seven: Accountability

Introduction.....38
Self-Assessment: Who’s *Accountable?*.....39
Characteristics of Shared Accountability40
Knowing Who Is Accountable for What Performance41
Tools for Action: Creating the Scorecard42

Chapter Eight: Getting It Done!

Getting Things Done: Phases of Action44

Getting Things Done: Course Review46

Appendix

About the Author.....48

Course Evaluation49

Solutions for Every Training Challenge51

Course Introduction

Course Objectives

Successful completion of this course will increase your knowledge and ability to:

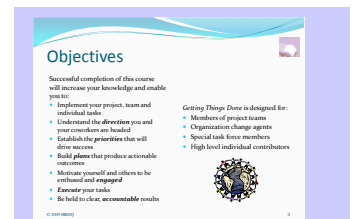
- Implement your project, team and individual tasks
- Understand the *direction* in which you and your coworkers are headed
- Establish the *priorities* that will drive success
- Build *plans* that produce actionable outcomes
- Motivate yourself and others to be enthused and *engaged*
- Execute* your tasks
- Be held *accountable* to clearly defined results

Who is this for?

Getting Things Done is designed for:

- Members of project teams
- Organization change agents
- Special task force members
- High-level individual contributors

These individuals need to be able to rapidly, effectively and efficiently implement critical, time-bound work goals to a successful, measurable conclusion.



Lecture: Welcome everyone to *Getting Things Done*. Spend a few minutes going over both the course objectives and the intended course audience.



Lecture: Spend a few minutes going over the topics you will study and the course and the various activities the participants will experience to learn the material.

Facilitated Discussion:

Have the participants in the program take a few minutes to think about and characterize the situation they want to focus on for the course. Note that they will refer to this experience—a project, task or key goal—throughout the remainder of the program. Each chapter of *Getting Things Done* will require them to reflect on their current situations in order to complete the chapter activities.

At this point in the program it is recommended that you facilitate group/individual introductions in parallel with having participants reflect on their situations of focus. Suggestion: Have participants pair up, introduce themselves to each other and talk about their example situations. Then have participants introduce themselves to the larger group/class.

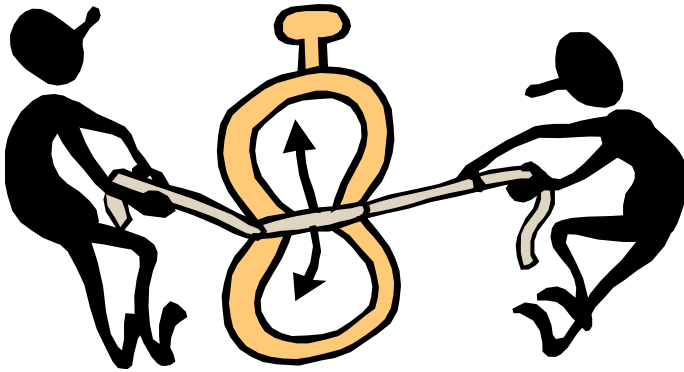
What's YOUR Situation?

Tell us about the specific situation you want to work on. Read over the list below and circle the project or task that best describes what you want to get done.

- Develop/deliver a new training program
- Design/implement an organizational change
- Introduce a new technology
- Introduce a new product or service
- Implement a performance management system
- Create a compelling communication plan
- Work across organizational boundaries
- Other _____

After you have determined the project/tasks you want to focus on in the program, list the three greatest challenges to your success in the space below.

Chapter One



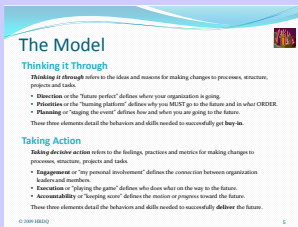
STUCK IN THE MIDDLE!

Facilitated Discussion:

Have the participants take a few minutes to reflect on what a successful project/task implementation looks like—that is, the tangible behaviors, metrics, feedback, etc. that clearly indicate their experiences of project/task success.

Next, give participants a few minutes to reflect on their *personal* reactions to a successful project/task—that is, their emotional reactions and feelings regarding performance, enthusiasm, engagement, etc.

Depending on the pace and timeframe of the course so far, either solicit a few examples from the group and post the characteristics on a flip chart, or tell participants to refer to their notes as the course progresses and they formally discuss the success factors of successful project/task implementation.



Introduction

Write down what it *looks like* when you implement a major project or task successfully.

Write down your *personal reaction* to completing a major project or task successfully.

The Case for Change

"I'm not the boss, so how do I get it done?" Sound familiar? Many of us have had the experience of either developing or being given a well-thought-out plan or set of tasks or performance objectives, only to have the implementation fall flat. Often, handing off a project to mid-level managers and individual contributors leaves them between the "rock" of executive vision and the "hard place" of employee action. Managers and employees stuck in the middle between *knowing* what they have to do and *getting* their people to do it often face the greatest challenges of their careers—especially when the "what" is to get their organization, project or team to go in a new direction.

"Organizations that successfully make strategy happen have galvanized their mid-level managers and employees to carry out the "heavy lifting" of the executive vision."

-Right Management Associates: *"Creating Value through Mergers & Acquisitions"*

Direction, **Priorities**, and **Planning** help you get things done by focusing on thinking it through. **Engagement**, **Execution** and **Accountability** help you get things done by focusing on taking action. When you align the tangible outcomes of each of these behaviors, you will GET THINGS DONE!

Thinking it Through	Taking Action
Direction	Engagement
Priorities	Execution
Planning	Accountability

Lecture: The main problem with many organizational implementations is that there is a disconnect between what leaders want to happen and the "real" work that has to be done. This "real" work, which usually falls into the hands of mid-level managers and individual contributors, includes the actual work tasks and involves navigating the politics, emotions and operational barriers to success.

Since most employees who have to get complex tasks and projects done are not directly in charge of many of the people whose work they need, how do they make this happen?

The model on page 3 is a summary of best management practices: the behaviors and actions successful project/task leaders use to implement their goals. "Thinking it through" refers to the behaviors necessary to create a strategy that is compelling enough for people to follow. "Taking action" refers to the behaviors necessary to successfully execute on the strategy.

Lecture: This section goes into an overview of the ideas in the chapter, and gives behavioral examples of how to get employees to think through a project or task systematically. The goal is to generate one of the two key success factors of successful implementation: to get **buy-in** from team members and stakeholders as you think through your project/task. Without buy-in, no amount of technical expertise, cajoling, capital or labor expense will ensure success. Time and again, it has been proven that psychological involvement is necessary for success.

Most managers and employees know this, at least intuitively. *Getting Things Done*, specifically the sections on Direction, Priorities and Planning, demonstrates the learnable behaviors that participants and their team members and stakeholders can use to enable buy-in to occur.

Thinking It Through and Getting the Buy-In You Need

Thinking it through refers to the ideas and reasons for making changes to processes, structure, projects and tasks.

Business best practices indicate that well-thought-out change plans provide you with a concrete picture of how your organization's products, processes, and/or services will look at some future date. The vision of the change is so clear that you could literally, if asked, sketch it out on a paper napkin. Your sense of urgency about moving ahead is so great that you are bursting to communicate it to others, and your tasks are clearly prioritized. At a high level of authority, you have mapped out your general timeframes, budget and personnel requirements, and analyzed any threats that might impede your progress.

Signs that you, your project team, and/or your task group members may not be thinking it through are:

- you may be "fuzzy" on the future;
- you only have vague senses of where to go and what to do next; or
- management may come across as "I'll know it when I see it" concerning expectations.

As a result, you may be complacent about the need to change. Indeed, you may deny that any change is necessary, as "everything seems OK." There may be little concrete data on budgets, resources, or any other analysis that would drive and support a change.

In order to *get the buy-in* you need to get things done successfully, you need to have direction, priorities, and plans that are complete, clear and communicated. Chapters 2 through 4 of *Getting Things Done* will help to facilitate your success.

Taking Decisive Action: Delivering on Your Commitments

Taking decisive action refers to the feelings, practices, and metrics for making changes to processes, structures, projects, and tasks.

Business best practices indicate that not only should you be a zealot for the changes you want to make, you should also have the kind of infectious enthusiasm that gets everyone to champion your cause and get engaged. You should know exactly who needs to be on your team to win, what they need to do, and how to play. You should have a “deep bench.” All of the players should know how they are doing, when and where they need to change midcourse. Everyone should know how they are performing—there should be no surprises.

Signs that you and/or your project, team or task members may not be taking decisive action are:

- you do not feel sincere about the changes you and your organization need to make;
- you may be hedging your bets against your own success; or
- you're not sure how to “keep score” of your goals, and who exactly is accountable for what.

As a result, you may take a “decide and announce” approach to action, fail to include key stakeholders in your decisions, or leave it up to others to figure things out, in effect distancing yourself from your tasks. Performance assessments may appear ad hoc, unfair, or both.

To *deliver on your commitments*, you need to be personally engaged and able to execute plans effectively, and you need have clear accountability for actions. Chapters 5 through 7 of *Getting Things Done* will facilitate your success.

Lecture: This section goes into an overview of the ideas in the chapter, and gives behavioral examples of how to get employees to take decisive action and make decisions on a project or task. The goal is to generate the second of two key success factors of successful implementation: to get a level of **commitment** from team members and stakeholders as you complete your project/task. Without commitment, no amount of vision, planning or influencing will ensure success. Time and again, it has been proven that measurable, accountable progress that is visible to all is necessary for success.

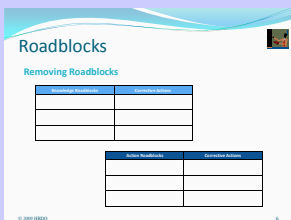
Most managers and employees know this, at least intuitively. *Getting Things Done*, specifically the sections on Engagement, Execution and Accountability, demonstrates the learnable behaviors that participants and their team members and stakeholders can use to ensure delivery on commitments.

Facilitated Discussion:

In this section, have participants reflect on the projects/tasks they identified earlier in the course. Specifically, they are to follow the instructions on this page and think of knowledge- or information-related barriers to success, along with any corrective action they could, in hindsight, have taken.

Similarly, participants are to refer to the projects/tasks they identified earlier and think of the actions, or observable behaviors, that inhibited success and any corrective action they could have taken.

It is important that participants keep in mind their real-world experiences of what worked and what got in the way of success on their past projects/tasks. As the course instructor, you will want to refer to these experiences and examples throughout the course.



Getting Unstuck: Roadblocks to Success

Instructions: In the spaces below, write down the “knowledge roadblocks” to your success: the information, facts and data you need to know—but don’t yet have—to be successful. Then write in the corresponding actions you are going to take to secure the knowledge.

Knowledge Roadblocks	Corrective Actions

Instructions: In the spaces below, write down the “action roadblocks” to your success: the timeframes, relationships and roles you need to know—but don’t yet—to take concrete steps forward. Then write in the corresponding actions you are going to take to secure the knowledge.

Action Roadblocks	Corrective Actions

“For you as a leader, moving from the concept to the critical details is a long journey.”
 -Bossidy and Charan, *Execution: The Discipline of Getting Things Done.*






Reproducible Training Library



DELIVERING HIGH-QUALITY, CUSTOMIZED TRAINING HAS NEVER BEEN SIMPLER.

The Reproducible Training Library offers a full suite of training solutions, in three formats:

-  Instructor-led Classroom programs with reproducible instructor and participant guides
-  Self-study e-Learning with freely distributable self-study module in Microsoft PowerPoint© format
-  e-Books in freely distributable pocket book Microsoft Word© format

All formats can be easily customized so it's your training, your way. Why spend the time when we've done the work for you?

Get started today!

Download the Info Kit hrdqstore.com/rtl-info or call our Customer Service Team at **800-633-4533**

ABOUT US

HRDQ is a trusted developer of soft-skills learning solutions that help improve the performance of individuals, teams, and organizations. We offer a wide range of resources and services, from ready-to-train assessments and hands-on games to facilitator certification, custom development, and more. Our primary audience includes corporate trainers, human resource professionals, educational institutions, and independent consultants who look to us for research-based solutions to develop key skills, such as leadership, communication, coaching, and team building.

At HRDQ, we believe an experiential approach is the best catalyst for adult learning. Our unique Experiential Learning Model has been the core of what we do for more than 30 years. Combining the best of organizational learning theory and proven facilitation methods with an appreciation for adult learning styles, our philosophy initiates and inspires.

**DOWNLOADABLE,
CUSTOMIZABLE, REPRODUCIBLE
& AFFORDABLE**

For more information or to place an order, please call or visit us at:

HRDQSTORE.COM | 800-633-4533