

Purepost Knowledge Center

Personal Development Series

Module 14

Action Planning:

Using the Outcomes-Methods-Resources (OMR) Model

Webinar Handouts

The OMR Action Planning Model

The **OMR Model** is a specific leadership thinking strategy that provides a leader with a systematic way to visualize, understand and structure the planning process.

Planning Defined

- **Planning** is the process of thinking about the activity required to achieve a desired goal.
- It is the first and foremost activity to achieve desired results.
- It involves the creation and maintenance of a **plan**, such as psychological aspects that require **conceptual skills**.

Purposes of Planning

The purpose of planning is to determine how the organization can get where it wants to go, and what it will do to accomplish its objectives.

The protective purpose of planning is to minimize risk by reducing the uncertainties surrounding business conditions and clarifying the consequences of related management actions.

Three Types of Planning

Leaders are normally responsible for three types of planning:

- 1. Strategic planning** – Conducted by top management and crucial to the ultimate success of an enterprise. These are typically 5-10-year plans that are crucial to the direction, growth, and transformation of the enterprise.
- 2. Intermediate planning** – Conducted by middle management and is vital to the success of a division or business unit. These are typically 1-3-year plans that are important to the operational improvement and growth of the organization.
- 3. Short term planning** – Conducted by middle and first-line management and is important to the success of a business unit. These are typically 3-6 month plans that are important to the policies, procedures and budgets of the business unit or team.

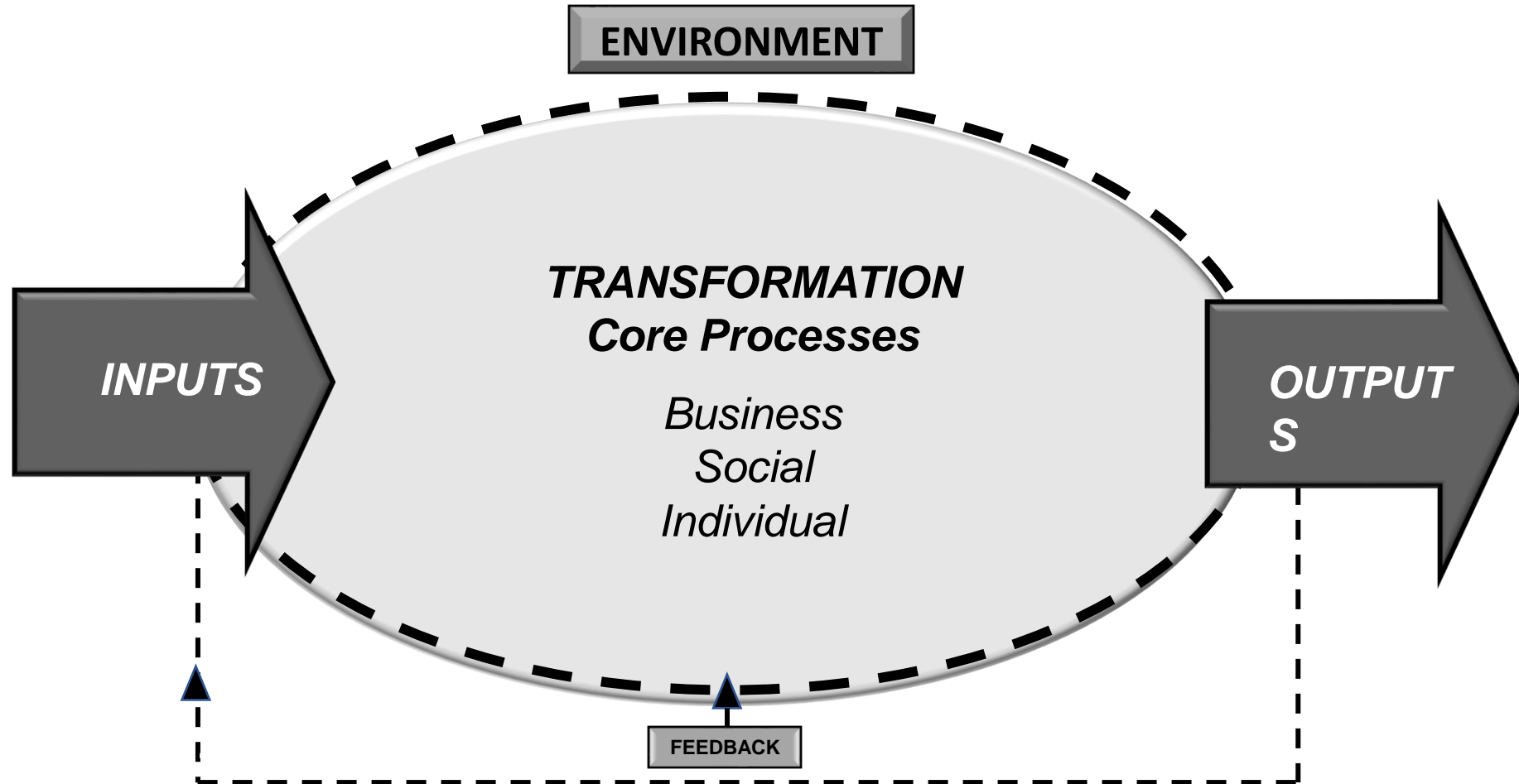
The OMR Action Planning Model

1. A fundamental principle of the OMR model is that you begin with the end in mind. Thus, you begin to plan by thinking about what the final result or ***outcome*** should be.
2. The next step in the model focuses on how you will get from where you are now to the desired outcome, the ***method***.
3. Finally, you look at the materials, money, people and other assets, the ***resources*** needed to carry out the plan.

The Systems Approach to Planning

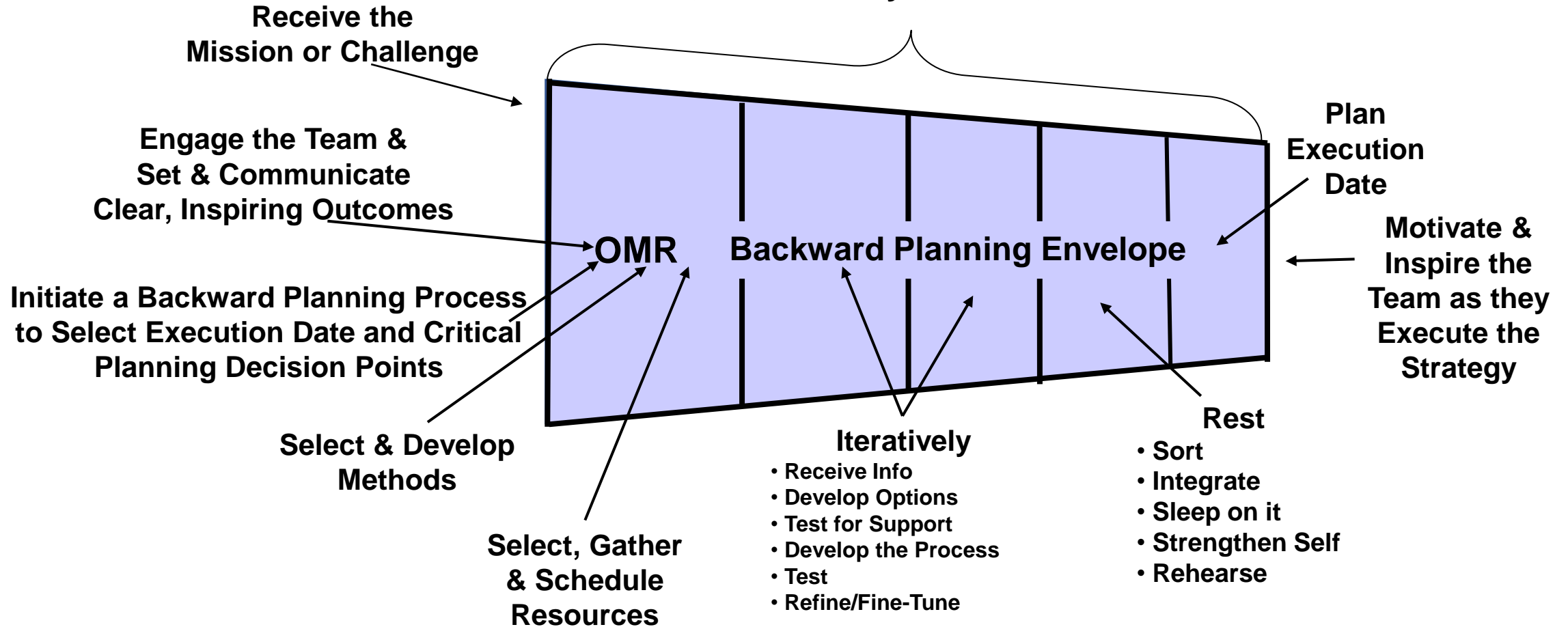
- The “Systems Approach” to action planning has been popularized over the 30+ years.
- This approach stresses the interactive nature and interdependence of external and internal factors in an organization. This refers to two basic concepts.
 1. Organizations are composed of several interlocking systems.
 2. As a planner, you must be aware of the impact your decisions in other area of the organization and other systems, if planning decisions are to be effective.

The Systems Approach to Planning

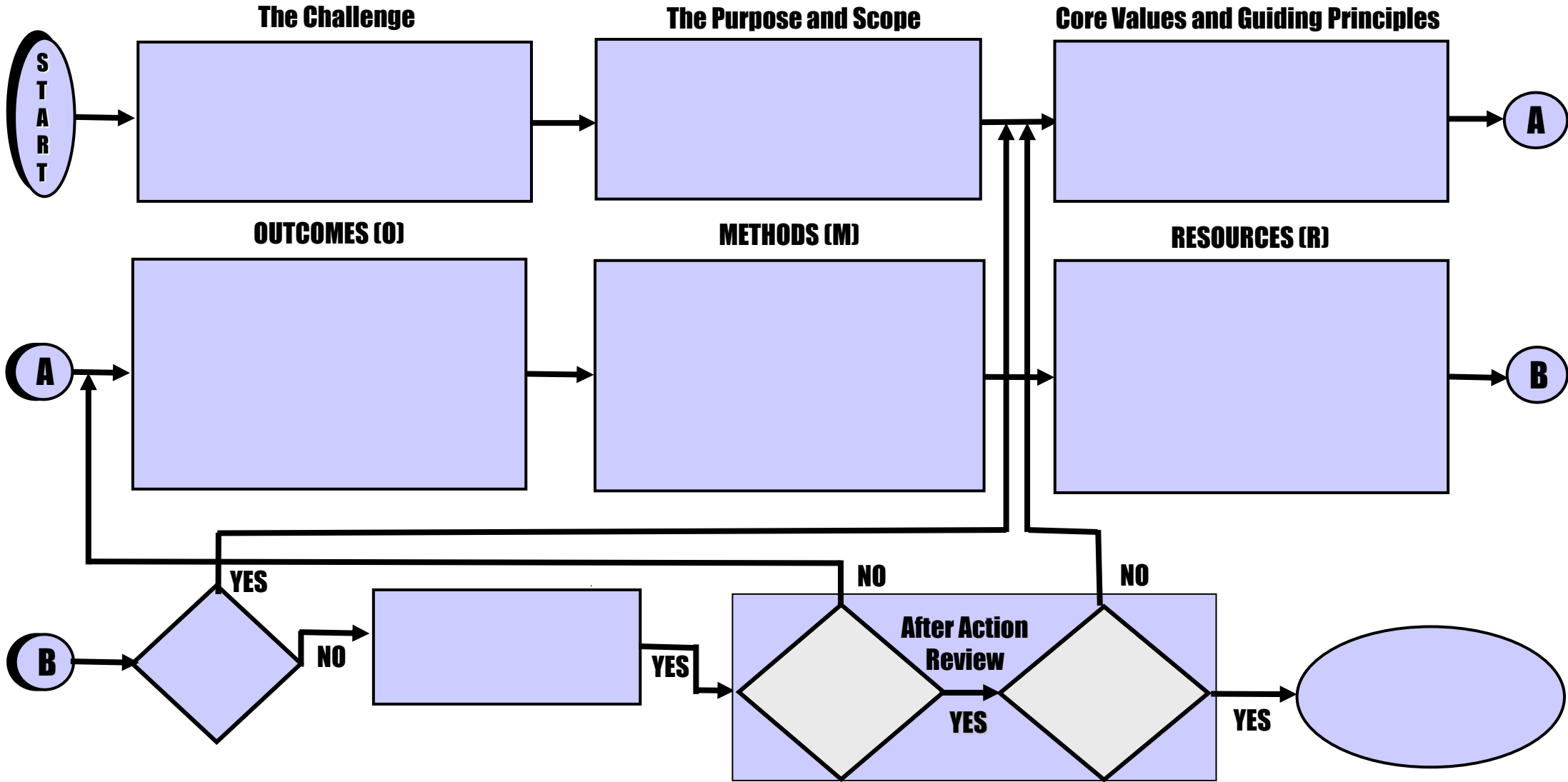


The OMR Action Planning Strategy Envelope

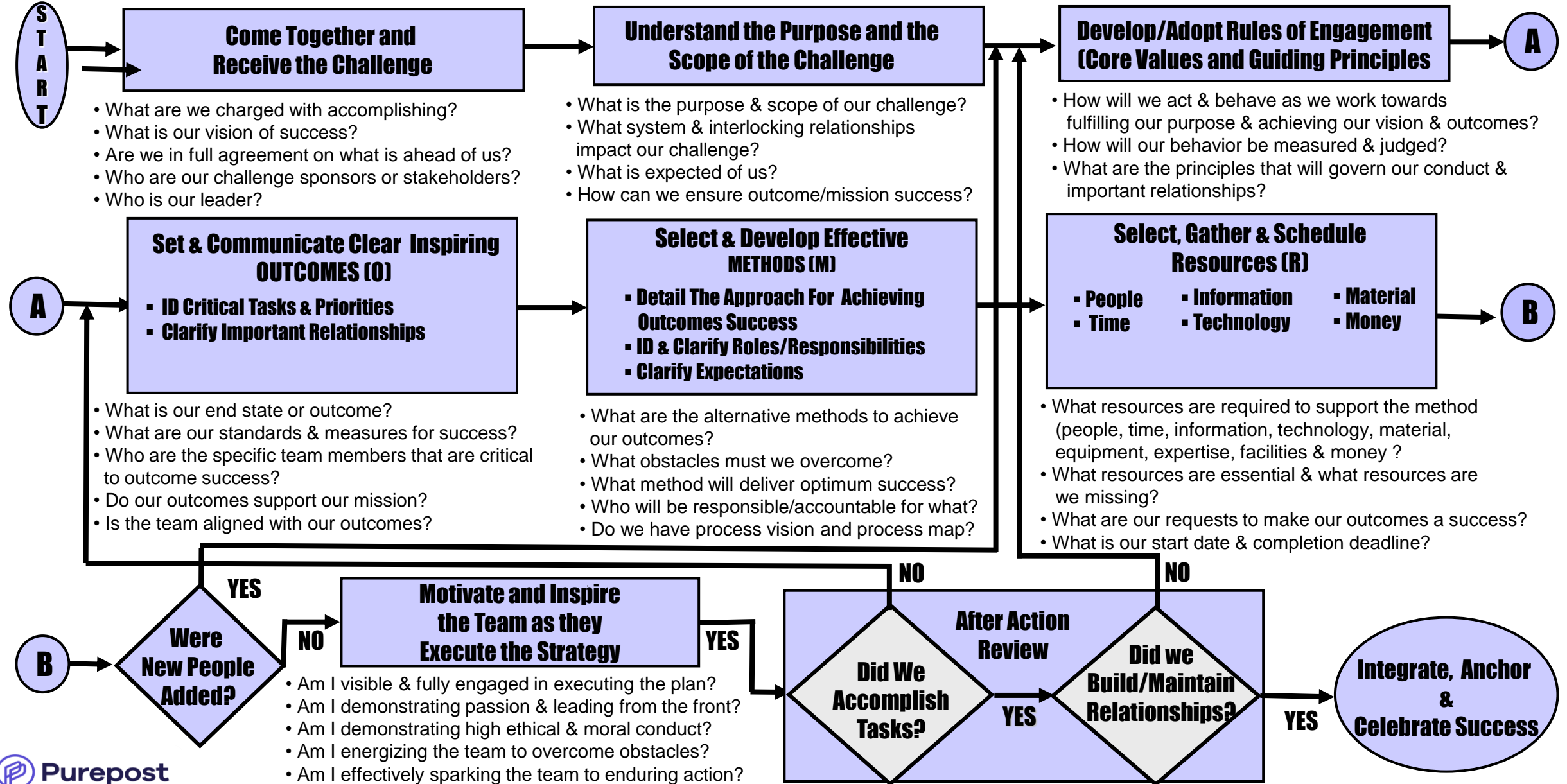
May be constructed in terms of
Years, Months, Days, Hours, Minutes



The OMR Action Planning Strategy Template



The OMR Action Planning Strategy



OMR Detailed Assignment Template

Team/Organization:	•	CORE VALUES & Guiding Principles
Team/Organization Leader:	•	
Team/Organization Facilitator:	•	
Date:	•	
The Mission/Challenge:		

O Outcomes	M Methods		R Resources	
Specific/Concrete/Measurable Outcome Statement	Specific Methods/Tasks or Action Steps	Dates Start / Complete	Who is responsible? What people, time, information, technology, materials, equipment & money are required?	Estimated Time Needed

Barriers & Obstacles to Success:

Who is accountable to log completion dates and evaluate effectiveness of tasks or actions?

The OMR Action Planning Strategy

Effective outcomes are specific about (a) time frames, (b) the people that must be involved, (c) the things that must be done or improved, (d) the things that do not need to be changed, (e) and the required results.

When finalizing *outcomes*, consider the following criteria:

- ✓ Does the outcome identify the specific tasks to be completed?
- ✓ Does the outcome identify the specific relationships that must be built or maintained (i.e., what are the core values and specific guiding principles that will lead to task and relationship success)?
- ✓ Does the *outcome* specify the time frame in which the tasks are to be completed? Does the *outcome* specify who is to be involved in what parts of the task? Are responsibilities clearly defined?
- ✓ Does the *outcome* state specifically what needs to be improved, altered, or reduced because of the effort?
- ✓ Does the *outcome* also state what should be maintained? In other words, what things should not be changed?
- ✓ Does the *outcome* state clearly and objectively the standards by which success will be measured or judged?
- ✓ What impact will this *outcome* have on the organization and its stated mission?

The OMR Action Planning Strategy

To help understand what *methods* might be more appropriate under different circumstances, high performing leaders draw from the following list of questions to help them generate alternative *methods* for accomplishing a project:

- ✓ How should the task or project be accomplished?
- ✓ Who are the decision makers for specific aspects of the task or project?
- ✓ Who will be accountable for what (i.e., clarity and full acceptance of roles and responsibilities)?
- ✓ What obstacles currently prevent the task or project from being completed at the prescribed success level? (restraining forces)
- ✓ What factors encourage *outcome* achievement at the prescribed level? (driving forces)
- ✓ How can leaders increase encouraging factors and decrease inhibiting factors?
- ✓ What are the alternative methods?
- ✓ What is the best possible method?

The OMR Action Planning Strategy

To help understand what ***alternative resources*** are available or best suited to accomplish their *outcome*, *high performing leaders* typically ask the following questions:

- ✓ What specific expertise is required for the task or project and who has it?
- ✓ How many total people does the task or project require from start to finish?
- ✓ When should the task or project start?
- ✓ When should the task or project be completed?
- ✓ What is the timeline for each aspect of the task or project (i.e., detailed milestone chart)?
- ✓ What facilities, equipment and materials are needed and available?
- ✓ Is money available to cover all costs?

Motivating and Inspiring the Team to Execute the Strategy

- During the strategy execution stage high performing leaders repeatedly ask themselves a series of questions to keep themselves focused and grounded on their vital leadership role.

These questions are:

1. Am I visible, involved and fully engaged as the team or organization executes the strategy?
2. Am I demonstrating passion, leading from the front and being a role model that team, or organizational members want to emulate?
3. Am I demonstrating high standards of ethical and moral conduct?
4. Am I energizing team or organizational members to overcome obstacles by satisfying their basic human needs?
5. Am I effectively sparking team or organizational members to enduringly enthusiastic action that achieves outcomes, rather than the self-interests of team and organizational members?