

# Hybrid Planning

## Business planning processes for teams working in hybrid arrangements



The harder it is to get people together, the more important it is to get them involved. Our hybrid approach is designed for everyone to participate

In recent years many were finding it harder to bring teams together for business planning and development. This challenge escalated with the arrival COVID, the uptake of hybrid work arrangements, and the growth in geographically distributed teams. These brings added risks to team cohesion, process improvement, personal buy-in, and improved customer service.

Here are some design principles for planning in current conditions, drawn from our deep experience helping teams to plan and develop. There is also an example hybrid planning process to illustrate them. Note, these principles focus on the process structure. They don't address the team building dynamics that often go with planning.

Whether you work with us or go it alone, we hope these help you in the important work of bringing your team together to help people collaborate and aim for their best.

### Design Principles

1. **It's about voices:** Focus on enabling a conversation with many voices rather than holding an event or workshop.
2. **It's a sequence of activities:** A workshop is not a single activity but a sequence of activities. This sequence of activities does not have to happen on the same day or at the same location.
3. **It has limited scope:** Group planning processes usually focus on the vision and goals of the organisation's work, areas to improve or adapt, or about how to manage ongoing work. They do not reinvent all of an organisation's work, which is mostly stable year on year.
4. **It's about decisions:** Planning processes are about enabling decisions. These are about what information and ideas are important for the plan (data, brainstorming, scenario exploration, experience, feedback) and decisions about future actions (priorities, key relationships, roles and responsibilities, resources, methods, risk management).
5. **It's about guiding the plan:** Group planning processes don't write the plan but produce information to use in the preparation of the plan. The plan is written after the group process.
6. **It's about supporting decision makers:** The decision about the final plan goes to the relevant delegate or group, which may include participants, depending on the organisation's internal processes and the types of decisions involved.

#### ***We can help***

Grevillea Consultants can help you to explore options for a hybrid business planning process that suits your conditions. Contact our consulting director, Paul Hegerty, to start the conversation.

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# Example Hybrid Planning Process

## The operating conditions

1. The participant group size is 35. It is a mix of executives, managers, supervisors and staff.
2. Staff work from home or in the office, working some days per week at either location
3. Their current social distancing policies combined with the size of available facilities prevent whole of group sessions with all 35 people.
4. The group already has an active vision and direction. This is an operationally focused planning process.

## The team planning process

