

Defining and Delivering Measurable Value: A Mega Thinking and Planning Primer

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ABSTRACT

Mega planning has a primary focus on adding value for all stakeholders. It is realistic, practical, and ethical. Defining and then achieving sustained organizational success is possible. It relies on three basic elements:

1. *A societal value-added “frame of mind” or paradigm:* your perspective about your organization, people, and our world. It focuses on an agreed-upon focus on adding value to all stakeholders.

2. *A shared determination and agreement on where to head and why:* all people who can and might be impacted by the shared objectives must agree on purposes and results criteria, and

3. *Pragmatic and basic tools.*

This article provides the basic concepts for thinking and planning Mega in order to define and deliver value to internal and external partners.

The Societal Value Added Perspective and Frame of Mind

The required frame of mind for Mega thinking and planning, one’s guiding paradigm, is simple, straight forward, and sensible. It puts a primary concern on adding measurable value for external clients and society using one’s own job and organization as the vehicle. From this shared societal value-added frame,¹ everything one uses, does, produces, and delivers is linked to achieve shared and agreed-upon positive societal results. This societal frame of reference, or paradigm, I call the Mega level of planning.²

If you are not adding value to our shared society what assurance do you have that you are not subtracting value?³ Starting with Mega as the central focus is strategic think-

ing and provides the data based for strategic planning.

A central question that each and every organization should ask and answer is:

If Your Organization is the Solution, What’s the Problem?

This fundamental proposition is central to thinking and planning strategically—using a Mega focus—represents a shift from the usual focus only on oneself, individual performance improvement, and one’s organization to making certain you also add value to external clients and society.

An Overview of the Basic Concepts and Tools for Mega Planning

There are three basic guides, or templates, that will be helpful to de-

fine and achieve organizational success. Each is defined in much greater detail in several books (see the references), but for our entry into Mega Planning and strategic thinking, following is the short introduction to these three guides.

Guide One: The Organizational Elements Model (OEM)

Table 1 defines and links (aligns) what any organization uses, does, produces, and delivers with external client and societal value added. For each Element, there is an associated level of planning. Note that *Strategic planning* (and thinking) starts with Mega while *Tactical planning* starts with Macro and *Operational planning* at Micro.

These elements are also useful for defining the basic questions every organization must ask and answer as provided in Figure 1.

Guide Two: Six Critical Success Factors

Following are what provides a vital framework of this approach and for Mega planning. Unlike conventional “critical success factors,” these are factors for successful planning, not just for the things that an organization must get done to meet its mission. These are for Mega planning, regardless of the organization.

*Six Critical Success Factors (CSFs) for any organization.*⁴ Six critical success factors for Mega planning (not targeted for any one organizational business but only for the planning process and concern) are shown in Table 2.

Guide Three: A Six-step Problem Solving Model

Figure 1 includes (1.0) Assess needs (identify problems based on

needs), (2.0) Analyze needs (determine detailed solution requirements and identify, but not yet select, solution alternatives), (3.0) select solutions from among alternatives, (4.0) implement, (5.0) evaluate, and (6.0) continuous improvement (at each and every step).

Each time you want to identify problems and opportunities and systematically get from current results and consequences to desired ones, use the six-step process.

New Realities for Organizational Success

To be successful—to do and apply Mega Planning—you have to realize that yesterday’s methods and results often are not appropriate for tomorrow. Most planning experts agree that the past is only prologue, and tomorrow must be crafted through new patterns of perspectives, tools, and results.⁵ The tools and concepts for meeting the new realities of society, organizations, and people are linked to each of the Six Critical Success Factors.

The details and how-to’s for each of the three guides are also provided in the referenced sources. The three basic “guides” or templates should be considered as forming an integrated set of tools—like a fabric—instead of only each one on their own.⁶

Mega Planning

A Mega Planning framework has three phases: Scoping, Planning, and Implementation/Continuous Improvement. From this framework, specific tools and methods are provided to do Mega Planning. It is not complex, really. If you simply use the three guides you will be able to put it all together.

When doing Mega planning, you and your associates will ask and an-

Table 1
The Five Levels of Results, the Levels of Planning,
and a Brief Description

Name of the Organizational Element	Name of the Level of Planning and Focus	Brief Description	Type of Planning
<i>Outcomes</i>	<i>Mega</i>	Results and their consequences for external clients and society (shared vision)	Strategic
<i>Outputs</i>	<i>Macro</i>	The results an organization can or does deliver outside of itself	Tactical
<i>Products</i>	<i>Micro</i>	The building block results that are produced within the organization	Operational
<i>Processes</i>	<i>Process</i>	The ways, means, activities, procedures, methods used internally	
<i>Inputs</i>	<i>Input</i>	The human, physical, financial resources an organization can or does use	

6.0 Revise as Required

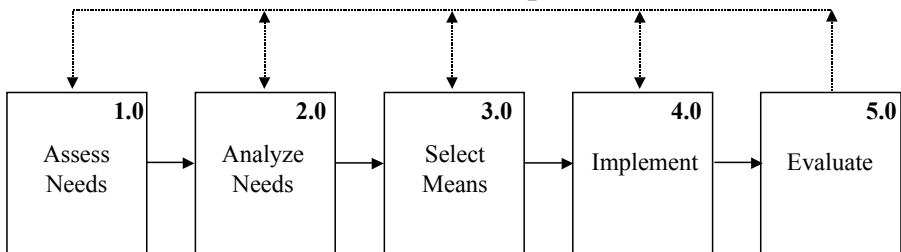


Figure 1. The six-step problem solving process:
A process for identifying and resolving problems
(and identifying opportunities).

Based in part on Kaufman, 1992, 1998, 2000

Table 2
The Six Critical Success Factors for Mega Level Strategic Planning (and Strategic Thinking)

CRITICAL SUCCESS FACTOR 1
Don't assume that which worked for you and others in the past will work in the future.
CRITICAL SUCCESS FACTOR 2
Differentiate between ends (what) and means (how).
CRITICAL SUCCESS FACTOR 3
Use all three levels of planning and results (Mega/Outcomes; Macro/Outputs; Micro/Products).
CRITICAL SUCCESS FACTOR 4
Prepare all objectives—including the Ideal Vision and mission—to include precise statements of both where you are headed as well as the criteria for measuring when you have arrived. Develop "Smarter" Objectives.
CRITICAL SUCCESS FACTOR 5
Use an Ideal Vision (what kind of world, in measurable performance terms, we want for tomorrow's child) as the underlying basis for planning and continuous improvement.
CRITICAL SUCCESS FACTOR 6
Defining "need" as a gap in results (not as insufficient levels of resources, means or methods).

swer the following questions shown in Table 3.

A "yes" to all questions will lead you toward Mega planning and allow you to prove that you have added value—something that is becoming increasingly important. These questions relate to Guide One. It defines each organizational element in terms of its label and the question each addresses. If you use and do all of these you will align everything you use, do, produce, and deliver to adding measurable value to yourself, your organization, and to external clients and society.

Mega planning is proactive. Many approaches to organizational im-

provement wait for problems to happen and then scramble to respond. But there is a temptation to react to problems and never take the time to plan so surprises are fewer and success is defined—before problems spring up—and then systematically achieved.

The Six Critical Success Factors in Brief

Let's briefly look at each of the Six Critical Success Factors (Guide Three)—each will form the basis of a chapter following this Introduction—to get a feel for the frame of mind (or paradigm) Mega planning provides.

Table 3
The Basic Questions Every Organization Must Ask and Answer

QUESTIONS	SELF ASSESSMENT		ORGANIZATIONAL PARTNERS	
	NO	YES	NO	YES
1. Do you commit to deliver organizational results that add value for all external clients AND society? (Mega/Outcomes)				
2. Do you commit to deliver organizational results that have the measurable quality required by your external clients? (Macro/Outputs)				
3. Do you commit to produce internal results—including your job and direct responsibilities--that have the measurable quality required by your internal partners? (Micro/Products)				
4. Do you commit to having efficient internal processes?				
5. Do you commit to acquire and use quality—appropriate—human capital, information capital and physical resources? (Inputs)				
6. Do you commit to evaluate/determine 6.1 How well you deliver products, activities, methods and procedures that have positive value and worth (Process Performance) 6.2 Whether the results defined by your objectives in measurable terms are achieved. (Evaluation/Continuous Improvement)?				

Critical Success Factor 1

Don't assume that which worked for you and others in the past will work in the future.

There is evidence just about everywhere we look that tomorrow is not a linear projection—a straight-line function—of yesterday and today. Examples include car manufacturers that squander their dominant client base by shoving unacceptable vehicles into the market and airlines that focus

on shareholder value and ignore customer value. An increasing number of credible authors have been, and continue to tell us that the past is, at best, prologue and not a harbinger of what the future will be. In fact, old paradigms can be so deceptive that Tom Peters suggests that “organizational forgetting” must become conventional organizational culture.⁷

Times have changed, and anyone who doesn't also change appropriate-

ly is risking failure. It is vital to use new and wider boundaries for thinking, planning, doing, and delivering. Doing so will require getting out of current comfort zones. Not doing so will likely deliver failure.⁸

Critical Success Factor 2

*Differentiate between ends and means. Focus on “what” (mega/outcomes, macro/outputs, micro/products) before “how.”*⁹

People are “doing-types.” We want to swing right into action and in so doing we usually jump right into *solutions* (means) before we know the *results* (ends) we must deliver. Writing and using measurable performance objectives is something upon which almost all performance improvement authors agree. Objectives correctly focus on ends and not methods, means, or resources.¹⁰ Ends—“What”—sensibly should be identified and defined before we select “How” to get from where we are to our destinations. If we don’t select our solutions, methods, resources, and interventions on the basis of what results we are to achieve, what do we have in mind to make the selections of means, resources, or activities?

Focusing on means, processes, and activities is usually more comfortable as a starting place for conventional performance improvement initiatives. Starting with means, for any organization and performance improvement initiative, would be as if you were provided process tools and techniques without a clear map that included a definite destination identified (along with a statement of why you want to get to the destination in the first place). Also, a risk for starting a performance improvement journey with means and processes

would be the fact that there would be no way of knowing whether your trip is taking you toward a useful destination or the criteria for telling you if you were making progress.¹¹

It is vital that successful planning focuses first on results—useful performance in measurable terms—for setting its purposes, measuring progress and providing continuous improvement toward the important results, and for determining what to keep, what to fix, and what to abandon.

It is vital to focus on useful ends before deciding “how” to get things done. It also sets the stage for another related Critical Success Factor 3 (Use and Link all Three Levels of Results) through application of the Organizational Elements Model (OEM) and for Critical Success Factor 4 (Prepare objectives that have indicators of how you will know when you have arrived). The OEM relies on a results-focus because it defines what every organization uses, does, produces, delivers, and the consequences of that for external clients and society.

Critical Success Factor 3

Use and Align all three levels of Planning and Results.

As we noted in Critical Success Factor 2, it is vital to prepare all objectives that focus only on ends; never just on means or resources. There are three levels of results, shown in Table 4, that are important to target and link.

There are three levels of planning and results, based on who is to be the primary client and beneficiary of what gets planned, designed, and delivered. For each level of planning there are three associated levels of results (Outcomes, Outputs, Products).¹² *Strategic planning* targets

Table 4
The Levels of Planning and Results That Should be Linked
During Planning, Doing, and Evaluation and Continuous
Improvement and There Are Three Levels of Planning

PRIMARY CLIENT AND BENEFICIARY	NAME FOR THE LEVEL OF PLANNING	NAME FOR THE LEVEL OF RESULT	TYPE OF PLANNING
Society and External Clients	Mega	Outcomes	Strategic
The Organization Itself	Macro	Outputs	Tactical
Individuals and Small Groups	Micro	Products	Operational

society and external clients, *tactical planning* targets the organization itself, and *operational planning* targets individuals and small groups.

Critical Success Factor 4

Prepare objectives—including those for the ideal vision and mission objectives—that have indicators of how you will know when you have arrived (mission statement plus success criteria).

It is vital to state precisely, measurably, and rigorously where you are headed and how to tell when you have arrived.¹³ Statements of objectives must be in performance terms so that one can plan how best to get there, how to measure progress toward the end, and how to note progress toward it.¹⁴

Objectives, at all levels of planning, activity, and results, are absolutely vital. And everything is measurable, so don't kid yourself into thinking you can dismiss important results as being "intangible" or "non-measurable." It is only sensible and rational to make a commitment to measurable purposes and destina-

tions. Organizations throughout the world are increasingly focusing on Mega-level results.¹⁵

Critical Success Factor 5

Define "need" as a gap between current and desired results (not as insufficient levels of resources, means, or methods).

Conventional English-language usage would have us employ the common word "need" as a verb (or in a verb sense) to identify means, methods, activities, and actions and/or resources we desire or intend to use.¹⁶ Terms such as "need to," "need for," "needing," and "needed" are common, conventional, and destructive to useful planning. What?

As hard as it is to change our own behavior (and most of us who want others to change seem to resist it the most ourselves!) it is central to useful planning to distinguish between Ends and Means. We have already noted this as Critical Success Factor 2. In order to do reasonable and justifiable planning we have to (1) focus on Ends and not Means, and thus (2) use "need" as a noun. Need, for the sake

of useful and successful planning, is only used as a noun, as a gap between current and desired results.

If we use *need* as a noun, we will be able to not only justify useful objectives but we will also be able to justify what we do and deliver on the basis of costs-consequences analysis. We will be able to justify everything we use, do, produce, and deliver. It is the only sensible way we can demonstrate value added.

Critical Success Factor 6

Use an ideal vision as the underlying basis for all planning and doing (don't be limited to your own organization).

Here is another area that requires some change from the conventional ways of doing planning.

An Ideal Vision is never prepared for an organization, but rather identifies the kind of world we want to help create for tomorrow's child. From this societal-linked Ideal Vision, each organization can identify what part or parts of the Ideal Vision we commit to deliver and move ever-closer toward. If we base all planning and doing on an Ideal Vision of the kind of society we want for future generations, we can achieve "strategic alignment" for what we use, do, produce, deliver, and the external payoffs for our Outputs.

Conclusion

So? Mega thinking and planning is about defining a shared success, achieving it, and being able to prove it. Mega thinking and planning is a focus not on one's organization alone but upon society now and in the future. It is about adding measurable value to all stakeholders.

Mega thinking and planning has been offered for many years, per-

haps first formally with Kaufman's 1972 *Educational System Planning* and further developed in Kaufman & English, 1979, and continuing through 2005. In one form or another, using a societal frame for planning and doing has shown up in the works of respected thinkers, including Senge (1990) and more recently Prahalad (2005). For some reason, there continues to be some resistance to Mega thinking and planning; a resistance that seems to be increasingly evaporating as witnessed by the articles in this Special Issue of *PIQ* and indeed other professional contributions around the world. There is an emerging mainstream understanding of a requirement for a formal focus on societal added value, such as that from the worldwide managing director of McKinsey & Company (Davis, 2005). Social responsibility must be the central focus of strategic planning, not an "add on." It is gratifying that there continues this migration from individual performance as the preferred unit of analysis for performance improvement to one that includes a first consideration of society and external stakeholders; it is responsible, responsive, and ethical to add value to all.

Notes

¹The process for defining and using Mega relies on the democratic process of all persons who could be impacted by the definition of Mega coming to agreement.

²In some writings, "social value" formal considerations are limited to adding value to the associates working within the organization and thus might be missing the external social value suggested in Mega thinking and planning (January 10, 2005).

³Not all people see merit (and some even see danger) in using a Mega focus (Schneider, 2003; Winiacki, 2004). Along with others, including Brethower (2005) I find such objections to be either wrong or naive.

⁴Please realize that unlike many other presentations of critical success factors, these relate to any organization and should be generalized to any organization, public or private. Most “critical success factors” discussed in the management literature refer to organization-specific factors related to their unique business. These apply to any organization and are “above” any organizational-specific factors.

⁵Most planning experts now agree. I first proposed using a societal frame of reference as the primary focus for individuals and organizations in 1968 and 1969 (which brought alarm and suspicion on the part of many “old paradigm thinkers”). But I have recently been joined in this call for such new paradigms by many future-oriented thinkers including (but not limited to) those included in the references in this Introduction.

This shift in thinking to new paradigms—frames of reference that are radically different from the “conventional wisdom”—are sprouting as Joel Barker suggested that they would when seen by the “Paradigm Pioneers” of our world.

⁶Of course, each one is valuable. But used together they are even more powerful.

⁷Peters, 1997.

⁸Again, in Peters, 1997, he states that it is easier to kill an organization than it is to change it.

⁹It might seem as if there are a bunch of new words—jargon—flowing at you now. And there are. Please

be patient. Each will be defined, justified, and related on to the others. The distinctions are important.

¹⁰Bob Mager set the original standard for measurable objectives. Later, Tom Gilbert made the important distinction between behavior and performance (between actions and consequences). Recently, some “Constructivists” have had objections to writing objectives because they claim it can cut down on creativity and imposes the planner’s values on the clients. This view, I believe, is not useful. For a detailed discussion on the topic of Constructivism, please see the analysis of philosophy professor David Gruender, 1996: May-June.

¹¹Jan Kaufman provided this insight.

¹²It is interesting and curious that in the popular literature, *all* results tend to be called “outcomes.” This failure to distinguish among three levels of results blurs the importance of identifying and linking all three levels in planning, doing, and evaluating/continuous improvement.

¹³An important contribution of strategic planning at the Mega level is that objectives can be linked to justifiable purpose. Not only should one have objectives that state “where you are headed and how you will know when you have arrived,” they should also be justified on the basis of “why you want to get to where you are headed.” While it is true that objectives only deal with measurable destinations, useful strategic planning adds the reasons why objectives should be attained.

¹⁴Note that this CSF also relates to CSF#2.

¹⁵Kaufman, Watkins, Triner, & Stith, 1998: Summer.

¹⁶Because most dictionaries provide common usage not necessarily correct usage, they note that “need” is used as a noun as well as a verb. This dual conventional usage doesn’t mean that it is useful. Much of this book depends on a shift in paradigms about “need.” The shift is to use it only as a noun, never as a verb or in a verb sense.

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