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Creative Problem Solving with the RYG Awareness Indicator

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SUNY – Buffalo State
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Creative Problem Solving with the RYG Awareness Indicator

A Project
in Creative Studies
by
Shawn P. Kassirer

Submitted in Partial Fulfillment
of the Requirements
for the Degree of
Master of Science

May 2014

Abstract of a Project

Creative Problem Solving with the RYG Awareness Indicator

The purpose of this project is to show how Creative Problem Solving can be introduced into everyday processes and challenges through the use of business and project management monitoring tools. The project will review CPS facilitation experiences which explain how to integrate the CPS process alongside monitoring, controlling, and risk

assessment methods in order to optimize existing processes. As a part of this integration process the idea of why Creative Problem Solving facilitation could use tools and tactics which will provide awareness and motivation to keep the process on track until the goal is attained and success is met. The project will also explain awareness indicator tools such as survey questions and visual color coding and how they are effective in measuring success or failure based on driving momentum and monitoring risk. The finished product includes a 15 minute presentation on the RYG visual indicator tool, Pre and Post facilitation survey questions, as well as specific questions that are asked to heighten awareness around approach and process.

Key words: Project, task, awareness, measurement, risk, indicator

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_____
Date

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Dates of Approval

_____   _____

                                            Project Advisor: J. Michael Fox

_____   _____

                                            Candidate: Shawn P. Kassirer

                                            Table of Contents

Section 5

Authors Note:

Some context included within this text has been carried over from previous works written by the author while attending the Creative Studies Program at Buffalo State College.

Introduction

Facilitating and utilizing CPS (Creative Problem Solving) Tools for everyday operational problems and challenges contain a very broad range of research, theory and success stories. Most types of personal change or business challenges seem to need the aid of an objective leader or assessment tool to understand the problem, and to help define goals. Within a business context as well as on a personal level, the tools used within the CPS Facilitation process are the most effective after using them to resolve problems in both areas.

One major challenge consultants and change leaders often face would be introducing the CPS Facilitation process to those who are unfamiliar with Creativity tools. Selling the idea to those unfamiliar with CPS will usually mean showing proof. How do we prove the facilitation can be effective in moving an idea forward? How do we prove it will be effective

in staying on course and achieving the goal? How might we introduce our process without offending those who believe they already have a great process for change in place?

Description

These questions have been the focus of my challenge since I started the Creative Studies program in 1996. I originally left the Creative Studies Program to pursue Project Management. Project Management was then a documented and proven methodology used around the world. I quit my Creative Studies Master's Program in order to pursue a service which helped to clarify and complete projects in a more measureable and proven way.

At the time I did not quite know how to measure in a way which would show the effectiveness of facilitation. Practice CPS sessions helped me realize that the creation of a solid action plan along with showcasing progress with some type of indicator would mark the beginning of needed and measureable proof.

Even in 1996, I knew that CPS facilitation had proven systems that showed measureable results. Professional facilitators had all types of testimonials from local individuals to worldwide corporations indicating how effective the methodology was. My issue with the CPS process at the time was not its effectiveness, or whether it was too abstract. It certainly demonstrated effectiveness within all facilitations that I had played a role in. The recurring issue always seemed to be in presenting the idea to others---- those who were faced with the challenge- the potential client or *problem owner*.

Concept Testing

Those problem owners included individuals with issues on a personal level as well as those with business related issues at work. Even while going through the program at a younger age in 1996 I believed in the program fully, and presented all of the facts to potential CPS clients with the essential information. This included testimonials of those who achieved resolution after having gone through the facilitation. The experience showed that I could talk about creativity in a way that mattered to them. During my facilitation sessions I was able to utilize the Creative Problem Solving planning steps developed by Puccio, Murdock and Mance (2005, 2007). They describe their version of Creative Problem Solving as being "comprise(d) of three conceptual stages, six explicit process steps with six repetitions of divergence and convergence within each, and one executive step … to guide them all" (2007, p. 35).

Before facilitation took place, I generated the excitement, confidence, and facts of exactly what the process could attain for the potential client. When they were not convinced, further testimonials and articles were shown. Still there was skepticism. Later I would understand some of this skepticism as fear of change and taking risks, but all I could see at that time was doubt.

Everyone I approached with the subject seemed to have a great degree of skepticism towards facilitating, and an even greater degree of doubt when the word Creativity was introduced. There were many judgments about, and questions concerning creativity and its role in resolving a problem. I especially noticed this with potential clients who held industry-specific problems.

When an industry-specific problem was introduced by the client, I listened intently before introducing the idea of facilitation. Only when I had all of the facts did I present a problem statement back to the client or problem owner ensuring that I understood everything clearly. Two recurring problems that always ensued following my explanation were "How a generalist could resolve an industry specific problem*"*, as well as "How would I measure and show the progress made as a result of the CPS Facilitation?"

As a facilitator it is my role to explain how the CPS facilitation could take any problem and make it progress at some level in regards to clarity, gaining more ideas, and/or developing a plan of action. In most cases I was of the opinion that the CPS process was guaranteed to give the client more information (or clarity) than they had before the facilitation. The program gave me effective tools to work with, which could be brought into any industry for just about any problem. And I could do this as a general business person. I did not have to know any specific industry knowledge and did not have to consult for years to know how to resolve a problem no matter how technical or complex the idea presented was. This was the theory that I have always believed in as I had been on both sides and saw positive end results. There was still no easy way to display measureable performance from the time the problem is realized and presented at facilitation and put into a plan of action. Through experimentation with various approaches, I realized that I would need to present CPS in a way that interested the client and made it pertain specifically to the challenge that they were facing. The challenge would not only involve the introduction of a simple way to measure, but also involve finding a way to weave the CPS process into the current problem owners' process.

The question of how this could be done was an overwhelming one. The first part of my challenge would be defining and acknowledging the current process set in place by the problem owner. The introduction of a new process to the problem owner would need to be delicate. CPS would be introduced as an enhancement rather than a system since the problem owner could be offset if they thought their current process was being replaced, or just viewed as inadequate. Although my presentation will explain a couple of suggestions, I need to emphasize that the question on how to approach an existing individual or group about enhancing their existing process with CPS is a question that cannot be fully addressed within the scope of this project.

My first attempt at measuring progress within the CPS framework involved only a quantitative measurement survey. This survey measured results based on a percentage scale. I soon realized that a quantitative measurement system such as a visual health indicator or progress scorecard would provide immediate responses from potential clients, rather

than measuring with numbers and percentages only. The visual measurement actually produced immediate status results based on responses to project status questions. The visual indicator seemed to also provide a picture as overall project health. (See Appendix for examples of visual indicators)

After briefly introducing the visual indicator system and its purpose, I was then able to introduce the indicator surveys which attempted to measure process awareness. Part of my first process awareness testing included quantifying results before and after A CPS facilitation within a corporate setting.   Using an odd- numbered scale numbered one through nine (1 feeling the weakest and 9 feeling the strongest), I could quantify positive variance by totaling the numbers to each survey question, and eventually subtract them from the results of a post-facilitation survey.   This tool met some of the criteria such as establishing a baseline relative to how much was known about the initial idea in its discovery stage. However, final results collected from actual facilitations and as a result of prospecting for facilitations revealed two issues.

First, the problem owner could claim that they knew more about their problem and how to overcome all of the obstacles surrounding it than they really knew. This would affect survey results and prevent proper gap identification. Still, the problem owner would be made aware of some of the issues that were unknown before the questions were answered. The survey questions established that a problem owner may be too stubborn to change their process or admit that additional knowledge is needed; and answering the questions would reinforce this finding. The questions proved to serve as an awareness indicator whether the numbers backed this finding or not.

The second issue was the survey results themselves and how the results were output as numbers. The numbers were cold and impersonal. The process was also found in some cases labeled as "drawn out". In short the results needed too much explanation. I found that the approach would work in a business or organizational setting in most cases. Adjustments to how survey results were presented needed to include personal perspectives and individual contexts as well.

Since the CPS process helps individuals and is very personal, the measure and awareness surveys should be as well. I still needed a way to present, measure and convince which contained a simple process as well as attracting and retaining attention long enough to understand the value of Creativity.   Not until experimenting with several facilitation sessions did I find an effective and simple tool called the Red, Yellow, and Green Health Indicator.

I had been introduced to the Red, Yellow, Green Health Indicator system, or RYG, within the Project Management world at various Corporate Industries. My challenge would be in integrating this effective tool which needed to showcase problems and the path that would lead to their resolutions. Could RYG be used to weave CPS into everyday challenges and processes? How would it integrate alongside the six steps of the CPS process?

Momentum & Risk Indicators

During the 1990's, Information Technology had been expanded into multiple layers of specialty software and technical support areas which were measured by status meters (aka scorecards) whose aim was to quantify and report on task progress. Managing all of the tasks associated with installing new software systems within an IT department had become my responsibility. Industries everywhere were turning to a scientific process to manage the complexities of big IT projects. Tasks needed to be measured in order to report on resources, time and material used during the project or program. The most important part of the project for me however was always the status, or momentum of the project. How was it progressing? As indicated in Appendix B, an idea will move forward in three ways. They are:

1) *No Movement*- progress or momentum is completely stopped. The task and even entire project is now (at least temporarily) derailed.

2) *Moving with caution*- some obstacles seen ahead which would create friction (as indicated in The Momentum Framework (Michailidis, 2009)) and slow or stop the current momentum. Also take into account unforeseen obstacles which may hinder or cause current direction to stop.

3) *Moving along well* – no known issues or at least none detected

The indicators above can be defined into 3 simple labels:

Red, Yellow, Green (RYG)

The indicators above also represent not only status and momentum assessment, but can also show how we get to that specific point which is *the process*. The indicator monitors the speed, direction, and resource status and serves as an indicator in which to prioritize risk to the project. I would first like to speak about the process and how it relates to attaining optimal momentum as noted in The Momentum Framework cited above.

We all have a way that we accomplish tasks and the only way to accomplish any task is through a process. Some processes are more efficient than others, some are much defined, and others very random or seemingly non-existent.

How would one go about choosing and executing a process in order to keep momentum going? The Momentum Framework validates that CPS will give us the planning tools and action plan which will allow implementation. The continuing implementation process might be derailed where resources, speed, or direction cannot maintain their course. This challenge led me to the introduction of Project Management Methodology (PMM) into the CPS process.

Process

PMM is a practice accepted worldwide by organizations and industries. It allowed me to keep project task momentum going each day and would eventually drive my goals into completion. Without it, I had a subpar process which would leave tasks incomplete, overdue or over budget. My field testing would reveal how PPM would affect process, momentum, and measurement. I would first like to provide a background on PMM.

PMM Process

PMM has been incorporated, modified and implemented for as long as there have been projects to perform, and is thought to have originated in the field of ancient construction. The term "Project Management" is a fairly modern term and applies directly to standardized processes and procedures used around the world. These processes and procedures are part of what makes up the subset called PMBOK (Project Management Body of knowledge). The PMBOK term is inclusive and describes the sum of knowledge within the profession of Project Management. According to the Contributors of the PMBOK Guide: "The body of knowledge actually rests with the practitioners and academics that apply and advance it" (PMBOK Guide 2004)

It took a number of months to understand the purpose of each part of the Methodology. I would always think back to CPS Facilitation tools and how straight forward the purpose of each of the tools were. I could not help but make comparisons between CPS and Project Management methodologies- both the tools and the applications. The biggest question was "How such a large and complex methodology, could be accepted   as a Universal Standard, while CPS was practically dismissed?

I wondered if I could find the answers and somehow bring them into CPS Methodology. A large part of the doubts and concern surrounding potential clients relate to Creativity not having a popular track record. Within the PMBOK, I found an informative passage about worldwide recognition:

For those leaders involved in everyday Operational challenges "Seeking the help of people who have a track record of original thinking, those outside the normal workgroup, experts from other disciplines, and contributors with different backgrounds, cultures, and perspectives can all create a collective synergy that will yield a beneficial solution (Crowe 1994, p.19).

The argument that Creative Change and Creative Problem Solving methods are not popular due to lack of need would not be a valid one according to Crowe.

The need for the CPS Model is growing every day. It contains Universal appeal and is easier to relate to than the Project Management Model. It would seem that the entire array of CPS planning and process tools could be adapted and integrated into everyday challenges at a much higher rate.

Project Management has a reputation for setting standards and accomplishment worldwide. It is known to be concise, well defined, all continuously evolving within a centralized nine-step methodology process. These reasons may explain the credibility and recognition behind Certified Project Managers who sell their services around the world every day. The Creative Studies based FourSight Certification will add credibility to the facilitator's credentials, but the current doubters of creativity will want something more tangible in order to believe in the progress and effectiveness of creativity tools.

Before change leaders and CPS facilitators can showcase proven track records and universal appeal to potential clients, they must display an efficient way of measuring progress. The survey questions will first establish an awareness around status (how far or close the client is to implementing an idea), and next create a baseline which is a point that RYG can begin to measure.

Measuring Progress

Creating a baseline for the client is a tangible way for the client to see where they are with the issue and where they need to go, hence clarifying goals before the facilitation occurs. A Pre-Facilitation Survey should be given to the potential client in order to measure how close they:

1) understand the problem in its entirety,

2) Have enough solid ideas/alternative ideas to start developing a plan of action, and

3) Have obtained enough information and structure to finalize and implement a plan of action.

My proposed questions might develop awareness of their current process by asking, "How satisfied are you with understanding the nature of the issue?" Another asks, "To what level of satisfaction do you feel you have all of the requirements which surround this issue?"

Awareness Indicators

The details of the CPS Measurement Pre-facilitation survey would need to include all of the elements associated with the CPS model including stages of the problem- as it is clarified (or re-defined), and generating ideas as alternatives including risk mitigation plans. The RYG indicator would also be introduced and coincide along with the structured implementation plan.

When combined with the RYG indicator all answers to Pre-survey clarifying questions should allow the problem owner to be more aware of the current assumptions, risks, and process they are using to in attempting to attain their goal.

This level of awareness should allow the problem owner to see choices in how their process might be adjusted in order to overcome their challenge and start making progress towards the goal. Alternatively, the problem owner may realize that they need more information than previously thought. At this point, the problem owner could be assessed under the yellow indicator within RYG. Any type of ambiguity which impacts the speed or direction of the idea should be categorized as risk, as it could impact the goal. Even though this stage still represents discovery and idea finding, the problem owner should be made aware of the current status, especially one that poses risks to the initiation of a plan. Success will be met only the problem owner is:

a) Aware of the current state and,

b) Actively assessing for risks.

Awareness Survey Questions

Once clarification is obtained, building a need around the concept of brainstorming would be my goal in the second part of the survey. Survey statements such as "I feel that I have taken adequate time to assess and understand the problem above" and "I feel that I could invest more time in looking for alternate solutions to the problem" would fall under the Idea Generating section.

At this stage the problem owner (potential client) will need to be made aware of tools such as Ideating or Brainstorming to produce more ideas. During the discovery of an idea and before the facilitation is even planned, the survey awareness questions can start to introduce risk awareness into the process. Task specific RYG indicators will then reinforce risk awareness after the facilitation. Yellow indicators (and green indicators which may turn yellow due to impending risks) will be the signal which will allow for plan adjustment or the building of additional plans where needed. This process awareness is also known as Monitoring and Controlling and should continue to keep the process at optimal momentum.

Producing additional plans should also make the client feel more confident about their original concept, or at least allow them to strengthen it as they realize that there may be more to consider. Alternative plans are generated in order to offset risks and other obstacles. CPS idea generation was used to include multiple alternate plans and sub-plans in which to overcome obstacles which prevented momentum (speed) being greatly reduced.

When speed or direction is changed, our health indicator should point to yellow, as we are facing risk of derailment. The yellow status should indicate an automatic assessment and adjustment within the plan. Without alternative plans or risk mitigations ledgers, there cannot be any adjustment or course correction and thus we lose speed, direction, or both. Concept derailment will most likely follow. By using the RYG system to indicate the status of future issues, we are able to adjust our course ahead of time and avoid any impending derailment.

Managing Fear of Risk

Concept derailment may also occur due to the fear of risk. Avoiding change can be traced to fear (Gelman, 2013 p.1). The overcoming of fear or risk is essentially started with attaining clarity of the issue as well as the goals. This holds true for any company that goes through an innovative or change process. In the past, new ideas may have been developed and executed without much thought given to risk analysis and a risk response plan. Today, executive leaders and board members can no longer dismiss the risks as something that can be dealt with when the risk occurs. By then it is too late and the board members/leaders will be held accountable. As stated in the passage from Risk (McCarthy 2004, p.54).

The solution is not only to make sure that you learn of adverse risk conditions, but that you are sufficiently attuned

to the environments that generate these conditions in the first place, and in time to take preemptive action. Understand what red flags can derail your strategy and, just as important can derail the execution of that strategy. Then make sure you have a mechanism in place to alert you if those flags start waving.

The red flags or indicators will be a yellow or red status indicator placed on a chart next to the risk event. This chart (see Appendix B) will appear different depending on the type of project, and thus project plan. A client with a personal issue or little to lose in implementing a plan will not really need to consider much risk analysis and have no need to use an RYG indicator to help see progress. For other clients, hundreds of line items could be assessed with RYG indicators flagging all sub tasks monitoring for potential derailments.

Overcoming concerns will need to address initial fear of risk, whether the risk is time, investment, capital investment or both. More detailed analysis on how to overcome rejection can be found within Min Basadur eight-step process (Basadur, M., Pringle, P., Speranzini, G., and Bacot, M. 2001). This reference is important to overcoming obstacles and risks that the RYG indicator can help identify.

One question which probes deeper but is not part of the current awareness survey utilizes fear as a motivator: "What is the risk and consequences if this idea is not implemented, or if the goal is not obtained?"

This question can be used to gauge not only dedication to the idea, but also shift thoughts to types of risks that may ensue if no corrective action is taken.

Results

Other questions that I have left out of the awareness survey, but may start to include:

"What is the worst thing that could happen as a result of not reaching the goal?" and "What is the best thing that could happen if the goal is attained?"

Through the awareness indicator measurement survey, I hope to alleviate some fear from those potential clients who are not growing their idea. Additional time to overcome concerns and risks could be expanded to include breakdowns of each risk. My awareness survey attempts to identify concerns and identify hesitation on behalf of the problem owner by inquiring:

"I feel I have all of the essential information in which to initiate my plan at this moment."

The above is the need to shift the potential client's doubt on the fact that more information may be needed before a plan can be properly executed or even developed. I have also tailored the following statements according to needs which might relate to all (corporate, personal, non-profit) groups.

"I feel that I have properly identified any risks associated with my ideas", or

"I feel I have properly identified and corrected any risks associated with my action plan."

"I feel I have all of the information needed including alternative plans which will allow me to attain my goal and achieve success."

Key Learnings

In my attempt to establish the RYG health indicator as a way to introduce the CPS process to co-workers and potential clients in more convincing and streamlined way, I soon realized that I was involved with more than process integration. The RYG indicator was used not only as a monitoring tool which tracked progress from the implementation stage, but it also became an indicator to help with awareness and focus at the idea/concept stage.

The RYG and Awareness survey questions have both proved that effective Monitoring and Controlling can be integrated into the CPS process starting with the Pre-facilitation and into implementation and attaining the goal. Of course, as my theories were put into practice, I found that my approach to introducing the process would need to be tailored, depending on how firmly the client feels the need to hold on to the current process.

The awareness question survey along with RYG attempts to make the client aware of both project momentum as well as where they are in relation to obtaining their goal. The awareness and monitoring tools do this by exposing risks. The risks may then be identified, prioritized, and mitigated as they are integrated within the CPS process tools.

I found that challenges with resources, speed, and direction of the project tasks will always be imminent. The survey questions which ask why the goal was set were used to repurpose direction. This along with the survey question which addresses what will happen if failure to reach the goal is realized, will also help to repurpose direction and keep momentum moving toward the goal.

This third area for Monitoring and Controlling will be speed. Where RYG indicates yellow trending on an imminent red, progress may come to a halt if a deadline date is not met. This could bring existing momentum and the entire project to a stop. . Consider extending the deadline, where possible. Also, consider breaking down larger tasks into smaller ones in order to preserve momentum.

Conclusion

In summary this project has been a three-year culmination of experiences involving my career as a Project Manager, helping friends by holding brainstorming facilitations, as well facilitating non-profit CPS meetings.   Introducing the tools at their various stages into the facilitations allowed me to gain an understanding of the great benefits of CPS, as well as what still needs further development. I like to think of CPS as a dynamic construct in progress. This is where great minds are always working and researching in order to contribute their unique findings. It is an unexplainable feeling to know that I am part of a group which makes the CPS process their main area of study and focus.

One question that started to surface during the integrating of the PMM process within the CPS framework is in

regards to methodology and centralization. Could CPS gain the worldwide recognition, acceptance, and respect that the Project Management Methodology receives by becoming a "Methodology" itself?

What requirements will the CPS process need to fulfill before it might be classified as a methodology? Will additional certifications need to be created? Another consideration would be any requirements which would position the main CPS materials as centralized and within a "Body of Knowledge".

These questions relate to how CPS might continue to gain recognition on a wider scale. My next steps are to continue enhancing the Awareness Monitor and Control techniques in order to make them more accessible for individuals, consultants and those who are trying to implement solutions and obtain their goals each day. I have personally found these solutions to be of great benefit in my career as well as with my personal challenges.

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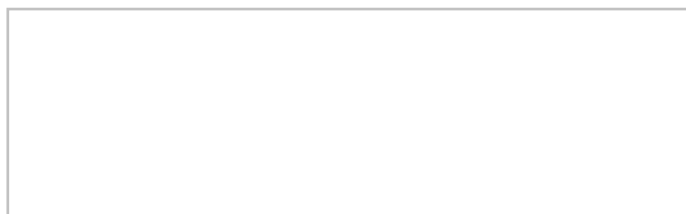
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Appendix A
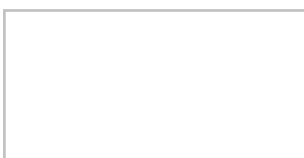
I1) Basic RYG Gauge
(Measuring/defining overall
Project progress or small set of
tasks)

I2) RYG indicating high level status by key categories

Guide to colors

Strong probability item will meet dates and acceptable quality.

Good probability item will meet dates and acceptable quality. Schedule, resource, or scope changes may be needed.

Probable that item will __NOT__ meet dates with acceptable quality without changes to schedule, resources, and/or scope.

Appendix B

Issue	Status	Action	Assigned to	Target	Needed by
My Learning Module	AT RISK	**Need E-learning product scope and how content will be used**	Course Master	Need to clarify and ideate on how it should look	In 2 days
New area of study Training		Training Materials (agenda, objectives)			yesterday
SMS Springboard Modules	ON COURSE	Contact vendor	S. Kassirer	modules will need to be evaluated (80% are useful, 20% need clarification)	3/7
Skill soft	ON COURSE	• **Need a list of all apps that need to be hosted**	Dianne Dzygun	working on dividing module into sections that would meet the needs of pilot	3/12
Training materials (administrator guide)	ON COURSE	Lower priority	Dianne Dzygun	Documentation needed for call with solution vendor (Found on client community) Need to administer access	4/30

I3) RYG listed in a spreadsheet indicating status. This Scorecard format can be used for larger projects involving multiple or complex tasks.

Note Scorecard Targets: A Scorecard may be used to display multiple measures of key performance indicators . They measure the current status of your plan against the desired target.

Note on Red status: turning one task indicator red will not necessarily turn the project status meter (top of page) to red. The task in question is of a lower priority and thus not bring the project to a complete halt. However, immediate adjustments will need to be made in order to reconcile the status and establish an acceptable completion date in order to keep project momentum in check.

Note on Yellow status: Yellow status is indicating a risk or potential risk and should indicate that one or more will need review and possible adjustment on speed, direction, and/or resources in order to maintain optimal momentum as noted within The Momentum Framework

Note on Green status: Indicator for on target or in progress. This is the optimum time to start assessing/re-assessing for potential risks. Brainstorming techniques should be used to generate list of all possible risks surrounding the task, followed by mitigation plans for each found.

Appendix C

Status Item	Prior Status	Current Status	Trend	Status Notes
Overall Status:				Last Minute Checks this weekend – Ready for Opening Day on Monday
Budget:				Adjustment made, funding approved
Schedule:				Monday March 31st - Gates Open 1:10pm EST, 1st Pitch 4:10pm
Scope:				
Resources:				
Vendor Resources:				Vendor Support Cancelled due to lack of skill set
Infrastructure:				Currently have in place new Shift4 UTG 2230 with Offline Resiliency Settings

I4) Status by trends on Key project areas

These scorecard formats can be formatted

Appendix D

their project goal

Survey Plan Questionnaire

Idea Owner:			Date:	

Purpose

To attain a personal readiness score by measuring your plan or idea's: Clarity, Strategic Readiness, Organization and

Risk Mitigation process.

This template is divided into the following question sections:

Objective

1. Briefly describe your idea or plan and its objective.

   (2–3 sentences)

Please answer the questions below using the rating scale 1-9, by typing the number underneath the score key.

A rating indicator of 1= least level of comfort or satisfaction. A rating of 9 = the highest level of comfort or satisfaction.

Example:
Do you agree with the objective statement?

1	2	3	4	5	6	7	8	9

5

| Strongly Disagree | Somewhat Agree | Strongly Agree |

Typing '5' within the box indicates you somewhat agree with the score for this question.

CLARIFICATION

2. I fully understand the objective of my idea and all of the underlying goals that my idea is trying to obtain.

1	2	3	4	5	6	7	8	9

| Strongly Disagree | Somewhat Agree | Strongly Agree |

3. I feel that my idea contains all of the essential requirements and information needed to build a successful strategic plan.

1	2	3	4	5	6	7	8	9

Strongly Disagree   **Somewhat Agree**   **Strongly Agree**

EVALUATE

4. I feel that I have spent an adequate amount of time generating alternative ideas and approaches which allow my plan the flexibility needed to ensure success.

1	2	3	4	5	6	7	8	9

Strongly Disagree   **Somewhat Agree**   **Strongly Agree**

5. Part of my strategy includes the development of a risk management plan which identifies potential obstacles and pitfalls.

1	2	3	4	5	6	7	8	9

Strongly Disagree   **Somewhat Agree**   **Strongly Agree**

6. I feel that I have properly identified risks and have generated adequate risk responses which could mitigate potential threats and concerns.

1	2	3	4	5	6	7	8	9

Strongly Disagree   **Somewhat Agree**   **Strongly Agree**

SOLIDIFY

7. I feel comfortable with identifying, prioritizing, and estimating all constraints that may serve to work against my objective.

1	2	3	4	5	6	7	8	9

Strongly Disagree   **Somewhat Agree**   **Strongly Agree**

8. I feel comfortable in identifying, prioritizing, and estimating all constraints that may serve to work against my timeline and budget.

1	2	3	4	5	6	7	8	9

Strongly Disagree   **Somewhat Agree**   **Strongly Agree**

9. While thinking about moving forward with my plan:
I feel comfortable in knowing that at times I will need to measure *plan progression* which ensures that I am meeting my original goals.

1	2	3	4	5	6	7	8	9

Strongly Disagree   **Somewhat Agree**   **Strongly Agree**

10. While thinking about moving forward with my plan:
I feel comfortable in knowing that at times I will need to measure plan progress to ensure that I am on target and avoiding any paths that may lead to disruptions or failures.

1	2	3	4	5	6	7	8	9

Strongly Disagree   **Somewhat Agree**   **Strongly Agree**

11. At this time I feel that I am fully ready to write a proficient plan of action which will allow my idea to attain a very high level of success. I feel that this can be accomplished within my known budget and time constraints.

1	2	3	4	5	6	7	8	9

Strongly Disagree   **Somewhat Agree**   **Strongly Agree**

12.   I feel that my idea contains none of the needed requirements needed to build a successful strategic plan.

1	2	3	4	5	6	7	8	9

Strongly Disagree   **Somewhat Agree**   **Strongly Agree**

SCORE INDICATOR

Stage of Plan	Score
Clarification	%
Evaluation	%
Solidification	%
Total:	%

Appendix E

Optional Awareness Questions

Purpose: to assist with controlling the process and steer momentum toward attaining the goal

1. What is the worst thing that could happen as a result of not reaching the goal?

2. What is the worst thing that could happen if the goal is attained?

Also consider:

3. What is the best thing that could happen if the goal is attained?

4. How will your personal plan or group mission improve if the goal is obtained?

5. How will the mission be impacted if the project fails and the goal is not obtained?

6. How will your future be impacted if the goal is not obtained?

7. How might delaying goal attainment for a little while impact your life?

8. What are all of the things that might happen if the new goal is not obtained and things continue to run as they are?

Appendix F