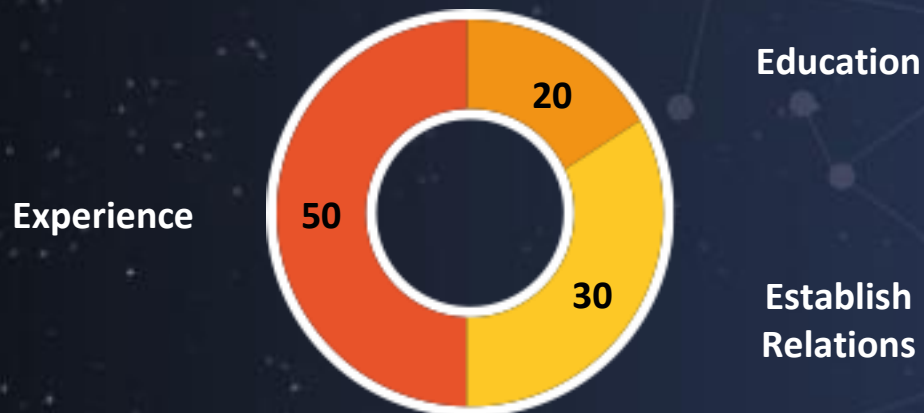


## APPLICATION

Planning and  
Organization



Setting the goal and defining the goal to be achieved is step number 1 of all processes. Planning is that process that begins with the establishment and guides you step by step to achieve the final result.

To carry out effective planning, it will be necessary that you always take a moment to identify and define each of your tasks, as well as setting priorities, as all tasks are important, but not all are critical to the goal.

Once the tasks have been defined, it is possible to define the time that will be devoted to each one of them to fulfill the work. Remember that many of the tasks will be related only to what you can directly do, however, many others will depend on the work of others, so this point takes more relevance as you will have to schedule your activities depending on the time of those who give you or those who serve, with the intention of avoiding conflicts.

Now, be prepared for the job, make sure you have the equipment and materials to meet each of the objectives and make the most of each available resources (people, processes, tools, etc.) to achieve efficiently with the goal that you proposed.

And lastly, do not forget to stay focused, use your time and resources and prevent those issues that may distract you from the tasks or that can cause the course of work to go in a different direction than the one initially defined.

It is time to put into practice all the knowledge learned, the purpose of the application exercises is to support you to integrate the knowledge to your responsibilities and job functions, as well as improve your performance and continue to develop new skills to boost your growth.

## REFLECT

- What was the most relevant learning during the planning and organization module?

- How can you integrate the experience shared by the sponsors to your day to day? Mention 3 ideas to implement.

## APPLY

### Worksheet

Choose one of your goals or projects that involve timely follow-up.

What we are looking for is that we can describe and disaggregate a goal or a project that is the driving force of your functions. You will need to follow each of the points described below.

**A) GOAL**

Write your goal:

Diagnosis of the goal:

Now you will need to divide your goal into particular tasks. Take into account the following points:

1. Description of the task.
2. Priority. According to the following nomenclature, assign the importance of the task (1= Very high, 2=High, 3= Intermediate).
3. Customer / Supplier. Mark in the box that corresponds, if you are the client of this task or you are responsible for delivering a service to another person.
4. Service Agreement. Depending on the role you play in this activity, define what the promise of service is and when it should be delivered.
5. Necessary resources, whether people, tools, etc.
6. Finally, in each task you will have to describe what is the follow-up given to the task, as well as the points that will allow you to know if your activity is within the established margins or at risk of reaching the goal.

**B) TASKS/ACTIVITIES**

**TASK 1:**                      **PRIORITY**                      **CLIENT**                      **SUPPLIER**                      **SERVICE AGREEMENTS  
(WHAT AND WHEN)**                      **NECESSARY  
RESOURCES**

				AGREEMENT:	PEOPLE:
				DELIVERY:	TOOLS:
				RECEPTION:	OTHERS:

**Tracking and checkpoints:**

**TASK 2:**                      **PRIORITY**                      **CLIENT**                      **SUPPLIER**                      **SERVICE AGREEMENTS  
(WHAT AND WHEN)**                      **NECESSARY  
RESOURCES**

				AGREEMENT:	PEOPLE:
				DELIVERY:	TOOLS:
				RECEPTION:	OTHERS:

**Tracking and checkpoints:**

**TASK 3:**

**PRIORITY**

**CLIENT**

**SUPPLIER**

**SERVICE AGREEMENTS  
(WHAT AND WHEN)**

**NECESSARY  
RESOURCES**

TASK 3:	PRIORITY	CLIENT	SUPPLIER	SERVICE AGREEMENTS (WHAT AND WHEN)	NECESSARY RESOURCES
				AGREEMENT:	PEOPLE:
				DELIVERY:	TOOLS:
				RECEPTION:	OTHERS:

**Tracking and checkpoints:**

**TASK 4:**

**PRIORITY**

**CLIENT**

**SUPPLIER**

**SERVICE AGREEMENTS  
(WHAT AND WHEN)**

**NECESSARY  
RESOURCES**

TASK 4:	PRIORITY	CLIENT	SUPPLIER	SERVICE AGREEMENTS (WHAT AND WHEN)	NECESSARY RESOURCES
				AGREEMENT:	PEOPLE:
				DELIVERY:	TOOLS:
				RECEPTION:	OTHERS:

**Tracking and checkpoints:**

Before you can establish an action plan, you will need to conduct a SWOT analysis (Strengths, Opportunities, Weaknesses and Threats) of your goal and activities you contemplate.

**OPPORTUNITIES**

**THREATS**

**SWOT**

**STRENGTHS**

**STRATEGIES SO:**

How do I seize opportunities using my strengths?

**STRATEGIES ST:**

How do I minimize threats using my strengths?

**WEAKNESSES**

**STRATEGIES WO:**

¿De qué manera elimino mis debilidades, aprovechando mis oportunidades?

**STRATEGIES WT:**

What do I do to eliminate my weaknesses and minimize my threats?

From this moment, you must establish a plan of action that will help you achieve each of the objectives, make the plan based on what was reviewed during your SWOT analysis and each of the above points.

As a reference, you can consult the Focus on results application to accompany you in the action plan.

## GET READY

Identify the 3 actions you will take in your daily work the next time you face this challenge.

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## WE SUGGEST YOU:

- Take the time to plan each of your goals, projects and activities at your expense.
- Establish priorities and deadlines for achieving objectives. Establish partial objectives and important points of control, whose compliance is verified as projects progress.
- Document the agreed upon goals and objectives in matrices or tables that allow you to follow up.
- Distribute monetary, material, human and personal resources, energy will allow you to dedicate more time and effort to those activities that need more detail and follow up.
- Make a diagram or calendar of activities to help you follow up; rely on tools such as Outlook, Microsoft Project or any agenda.
- Look for or adapt your workspace to help you be more productive and reach your goals. The more organized and cleaner it is, the better your approach.
- Analyze how you use your time. Use a blog to keep track of what you do and how long it takes. Identify your most productive hours and your areas of waste and inefficiency, and then work on decreasing them until eliminating them.
- Do not interrupt in the middle of a task to take care of another.
- Take into account all available resources (people, processes, departments and tools) to complete your work.