

# Planning Calendars...

Use them to save time, money and stress

## Complexity

Service organizations and retailers worldwide embrace strategies for managing projects. Even secondary projects are part of a larger plan, where success depends on many completed elements. Typically employees serve on multiple teams, where projects can involve numerous departments or divisions as well as vendors.

*Most projects mean managing concurrent activities affecting several departments, participants, documents and budgets.*

Projects require resourceful and comprehensive planning, with clear priorities, accountability and communication throughout. A tool is needed to meet deadlines, allocate resources, spot bottlenecks, and eliminate risk of failure.



## 5 Reasons for Late Projects

1. Delayed start
2. Inadequate resources
3. Poor schedule estimating
4. Uncertainty and risk
5. Time to obtain approvals

## Implications

The likelihood of project failure increases through:

- Lack of agreement and collaboration among team members
- Inability to see the entire effort's scope, needs and changes from a single, high-level viewpoint.

The planning calendar resolves these issues -- assisting with consensus and focus.

## Purpose

Planning calendars fill this need to organize, set priorities and define successful outcomes. Much like a well disciplined sports team, the planning calendar serves as the playbook, used by all team members to:

- Confirm their role
- Define objectives
- Know the role of others
- Establish timing.

With today's multiple budgets, overlapping resources and conflicting deadlines, success is directly related to a defined process. Planning calendars support this by clarifying phases, logistics, responsibilities and expectations.

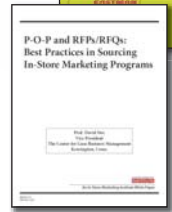
## Planning Resources

*Every (P-O-P) project involves custom manufacturing processes -- and folks, they all...take...time. Banging your shoe on a conference room table will not change certain laws of physics.*

P-O-P Times Supplement (2006), "Strategies For Success, Buying Custom P-O-P," [www.eastman.com](http://www.eastman.com), p.25, accessed January 2007

*Vendors will more willingly participate in the time-consuming and costly efforts to prepare bids if they understand the selection criteria and if buyers plan reasonable deadlines for responses.*

In-Store Marketing Institute (2005), "P-O-P and RFPs/RFQs: Best Practices in Sourcing In-Store Marketing Programs" White Paper, [www.instoremarketer.org](http://www.instoremarketer.org), p.7-8, accessed January 2007



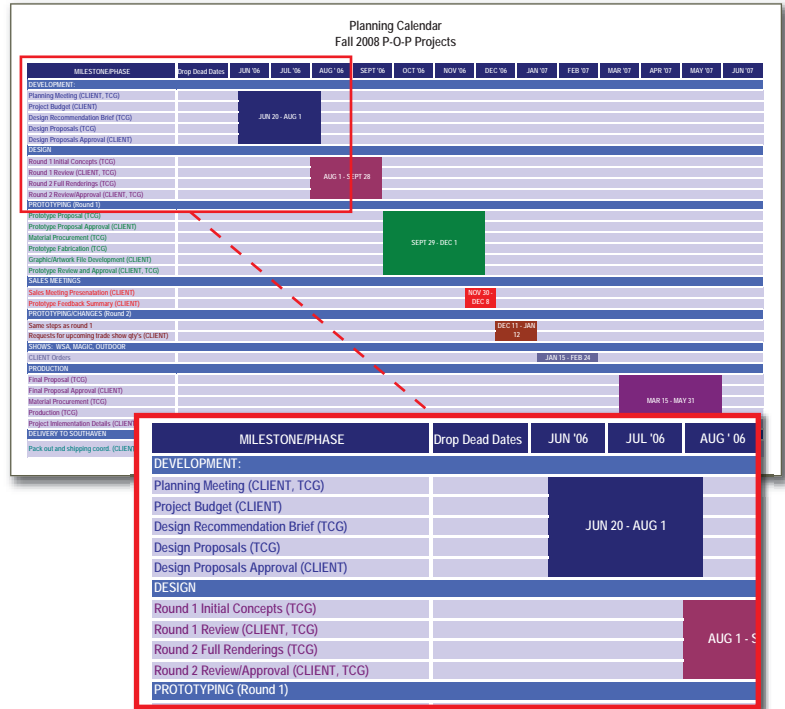
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## Examples

A planning calendar specifies action plans that assign accountabilities up front and bring groups together as a finely tuned team. These projects, for example, would benefit from a planning calendar:

- A construction job requires a manager as the main point of contact. Multiple suppliers and subcontractors constantly coordinate through this manager to complete the project. Raw materials, consisting of hundreds or thousands of inventory items, must be accounted for during many phases. Deliverables -- including contracts, permits, budgets and technical documentation -- must be adjusted and communicated continuously.
- An advertising agency, when executing an ad campaign, puts in place an account executive as project manager to review goals, oversee budgets, track schedules and work with internal and external resources. Multiple employees have input, decision-making power and requirements, such as copywriters who interface with clients on ad content and creative directors who approve strategy, copy and design. Vendors -- including production companies, printers and photographers -- are hired, each with specific contracts requiring approval. Constant customer input, shifting schedules, document revisions and fluctuating expenses call for immediate action. The whole team needs to stay updated.



## From Start to Finish

In summary, planning calendars help projects be on time, stay within budget and meet goals by:

- Keeping the team organized
- Communicating details and changes
- Aligning work with strategic objectives
- Applying workflow, budget, scheduling and other measurements
- Detecting and avoiding obstacles
- Increasing consistency and decreasing stress



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Jon Nedland has over 17 years of experience working with global brands in the financial, retail and consumer markets. He is an architect who has designed and implemented multi-channel programs in 7 countries. He leads the organization in identifying and creating selling environments that speak from the soul of a brand, working with a deep understanding of what motivates consumers.

The Carlson Group is a global, in-store retail marketing services company that offers targeted design, engineering, store planning, program development and installation of custom store environments, fixtures, P-O-P displays and graphics/signage.

### Other Resources:

Fundamentals of Developing P-O-P Programs  
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