



MANAGEMENT FOR CHEMICAL ENGINEERING (0905401)

07 – PLANNING

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## Planning Ahead — KEY TAKEAWAYS

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- Identify the importance of planning and steps in the planning process.
- List and give examples of the types of plans used by managers.
- Discuss useful planning tools and techniques.
- Explain how goals and participation influence planning success.



## Outline

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### 1. Why and How Managers Plan

- Importance of planning
- The planning process
- Benefits of planning

### 2. Types of Plans Used by Managers

- Long-range and short-range plans
- Strategic and tactical plans
- Operational plans



## Chapter 8 outline

### 3. Planning Tools and Techniques

- Forecasting
- Contingency planning
- Scenario planning
- Benchmarking
- Use of staff planners

### 4. Implementing Plans to Achieve Results

- Goal setting
- Goal alignment
- Participation and involvement

## Why and How Managers Plan

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### ■ Planning

- The process of setting objectives and determining how to accomplish them.

### ■ Objectives and goals

- Identify the specific results or desired outcomes that one intends to achieve.

### ■ Plan

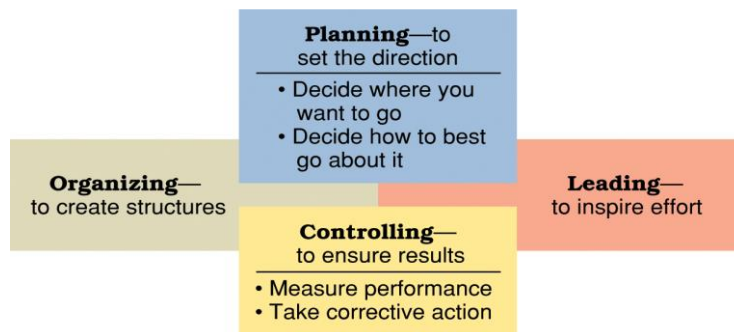
- A statement of action steps to be taken in order to accomplish the objectives.



## Why and How Managers Plan: Steps

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- Define your objectives.
- Determine where you stand vis-à-vis objectives.
- Develop premises regarding future conditions.
- Analyze alternatives and make a plan.
- Implement the plan and evaluate results.



## Benefits of Planning

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- Improves focus and flexibility.
- Improves action orientation.
- Improves coordination and control.
- Improves time management.



## Personal Time Management Tips: Do's and Don'ts

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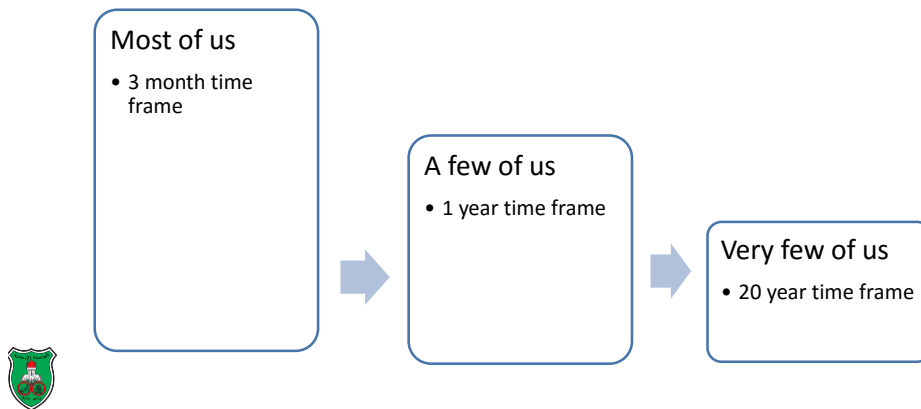
- DO say “no” to requests that distract from what you should be doing.
- DON'T get bogged down in details that can be addressed later.
- DO screen telephone calls, emails, and meeting requests.
- DON'T let drop-in visitors instant messaging use up your time.
- DO prioritize your important and urgent work.
- DON'T become calendar bound by letting others control your schedule.
- DO follow priorities; do most important and urgent work first.



## Types of Plans

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- Long-term plans look three or more years into the future.
- Short-term plans typically cover one year or less.



## Types of Plans Used by Managers

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- Strategic plans — set broad, comprehensive, and longer-term action directions for the entire organization.
- Vision — clarifies purpose of the organization and what it hopes to be in the future.
- Tactical plan — helps to implement all or parts of the strategic plan.
- Functional plans — indicate how different operations within the organization will help accomplish the overall strategy.
- Operational plans — identify short-term activities to implement strategic plans.



## Functional Plans

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- ■ Indicate how different operations within the organization will help accomplish the overall strategy.
  - ■ Production plans.
  - ■ Financial plans.
  - ■ Facilities plans.
  - ■ Logistics plans.
  - ■ Marketing plans.
  - ■ Human resource plans.



## Operational Plans

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- ■ Identify short-term activities to implement strategic plans
  - ■ Policies are standing plans that communicate guidelines for decisions.
  - ■ Procedures are rules that describe actions to be taken in specific situations.
  - ■ Budgets are plans that commit resources to projects or activities.
  - ■ Zero based budgets allocate resources as if each budget were brand new.



## Planning Tools and Techniques: Forecasting

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- Attempts to predict the future.
- Qualitative forecasting uses expert opinions.
- Quantitative forecasting uses mathematical models and statistical analysis of historical data and surveys.



## Planning Tools and Techniques: Contingency Planning

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- Identifying alternative courses of action to take when things go wrong.
- Contingency plans anticipate changing conditions.
- Contingency plans contain trigger points.



## Planning Tools and Techniques: Scenario planning

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- A long-term version of contingency planning.
- Identifying alternative future scenarios.
- Plans made for each future scenario.
- Increases organization's flexibility and preparation for future shocks.



## Planning Tools and Techniques: Benchmarking

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- Use of external and internal comparisons to plan for future improvements.
- Adopting best practices: things people and organizations do that lead to superior performance.
- Staff planners assist in all steps of the planning process.

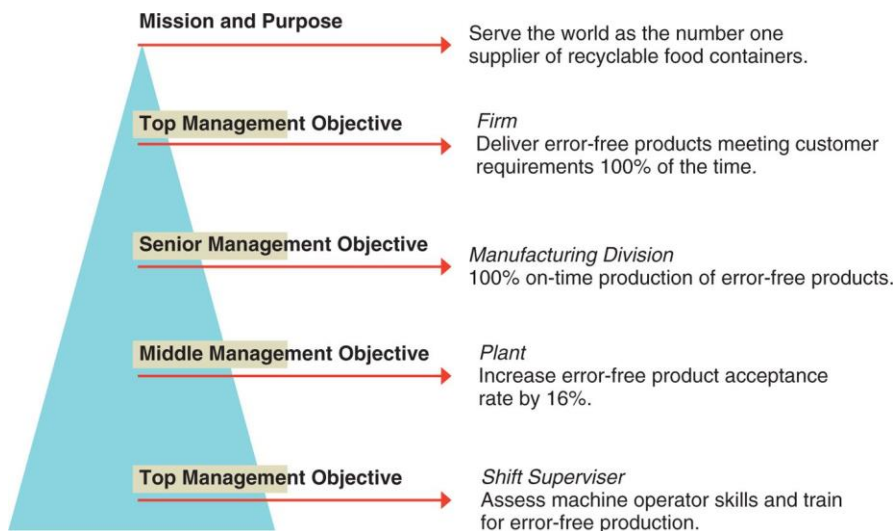




## Implementing Plans to Achieve Results



## A sample hierarchy



## Implementing Plans to Achieve Results

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### ■ Goal Alignment Between Team Leader and Team Member

- Jointly plan: set objectives, set standards, choose actions.
- Individually set: perform tasks (member), provide support (leader).
- Jointly control: review results, discuss implications, renew cycle.

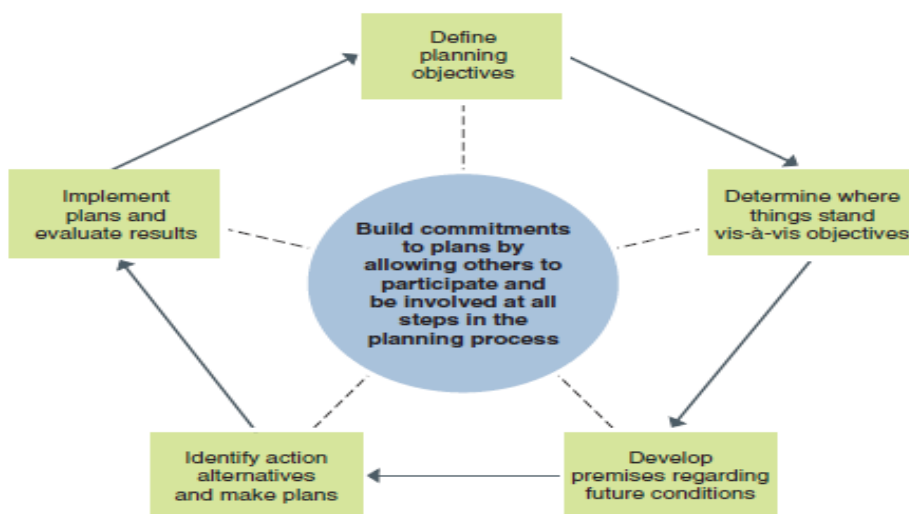
### ■ Participatory Planning

- Unlocks the motivational potential of goal setting.
- Management by objectives (MBO) promotes participation.
- When participation is not possible, workers will respond positively if supervisory trust and support exist.



## How Participation and Involvement Help Build Commitment to Plans

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