Quick Reference Guide to Planning Tools

Tool Name	How To Use It	When to Use It
AFFINITY DIAGRAM	1. State the issue for consideration. 2. Brainstorm ideas. 3. Randomly place idea cards on a flat surface. 4. Arrange into affinity groups (columns) 5. Clarify with authors meaning of words on remaining cards. 6. Consolidate. 7. Create Header Cards.	1. Any time you need to generate ideas on a given subject. 2. Any time you need to arrange things into affinity groups. HKC MM#2 CORE VALUES HKC MM#3 VISION
NOMINAL GROUP TECHNIQUE	1. State the question for consideration 2. Brainstorm ideas. 3. List ideas from group members. 4. Give members "hot dots". 5. Have members place hot dots by items they believe are most important. 6. Add up number of dots by each item and write that number by the item. 7. Items with the greatest number of dots become priorities	1. Any time you need to generate a list of ideas and narrow it down to a prioritized list. 2. Can be used in an abbreviated manner to prioritize or narrow down any list. To do this start at Step 4 in the "How to Use It" column (left). HKC MM#2 CORE VALUES HKC MM#3 VISION

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S.W.O.T. – STRENGTHS, WEAKNESSES, OPPORTUNITIES, THREATS	1. Have team members brainstorm ideas one quadrant at a time 2. Get at least one idea from every team member. 3. Write ideas on a flip chart for everyone to see.	Whenever you need to consider the various aspects of something. **HKC MM#4**
SPIDER DIAGRAM	1. Draw a circle on a flip chart and place affinity header cards around circle. 2. Put a dot in the center of the circle. 3. Draw a line from the center to a header card. 4. Have team members rate where you are today in regard to the item represented by the header card. The center of the circle is zero, the edge is ten. 5. When the team has arrived at a consensus number, put a dot on the line at that spot and write the consensus number by the dot. 6. Repeat as needed until all header cards have been rated. 7. Connect the dots with lines.	Whenever you need to get a perspective of how you are currently doing in regard to those things under consideration. **HKC MM#4**

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INTERRELATIONSHIP DIGRAPH	1. Draw a circle on a flip chart and place affinity header cards around the circle 2. Consider two header cards at a time 3. Ask the team, "Is there a relationship between these?" "If so, which one causes, drives or influences the other?" 4. Draw an arrow from the one that drives to the one that is driven. 5. Repeat as needed until all header cards have been considered. 6. For each header card count the arrows in and out and write these numbers beside the card. 7. The *primary driver* is the card with the greatest number of arrows going out. 8. The *primary effect* is the card with the greatest number of arrows going in.	Whenever you need to determine where to focus your efforts for maximum effect. By focusing on the primary driver you will achieve the greatest return for your efforts. **HKC MM#4**

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TREE DIAGRAM	1. Place a SMART goal in the left-most box of the tree diagram. 2. Ask the team, "What needs to happen to achieve this goal?" 3. Place answers in a column to the right of the goal. 4. Repeat Step 3 for each level of the diagram. 5. Check the tree diagram for logical flow by asking, "If we do this, will it help us accomplish our goal?" NOTE: Use sticky notes as you build the diagram.	Whenever you need to map out the steps that need to be taken to accomplish a goal. **HKC MM#5**
RESPONSIBILITY MATRIX	1. List all items from the tree diagram on the left-hand side of the matrix template. 2. List all people involved with accomplishing the goal across the top of the template. 3. Using symbols, note on the matrix who has primary, and who has secondary responsibility for each action. Also note who needs to know what is going on with each action. 4. Place the due date for each action on the far right column.	Any time you need to clearly note who is responsible for each action step to be taken to accomplish a goal. **HKC MM#5**