MAKE A LIST AND CHECK IT TWICE
To Do List
Plan Your Work

Respond to endless streams of request letters, make millions of high-quality products—according to exact specifications—364 days a year, package toys so they arrive in perfect condition, and deliver the exact right gift to the exact right person in the exact right house millions of times in one single night. That’s what we do every year. We do it flawlessly, and none of it happens by accident!

We begin by breaking down our one huge annual goal (our mission) of “delivering the goods” into a series of manageable, bite-size subgoals. We have them
for the shop in general, the teams within the shop, and individuals within the teams.

Whether in direct production and delivery, or a “behind the scenes” support function, **EVERYONE** has goals—including me. Our goals are specific yet flexible—allowing for changing conditions and circumstances. And because staff “buy-in” and commitment are so important to achieving our objectives, I make sure that everyone has input in the goal-setting process.

Once our individual and group goals are identified, we move into the planning (making “the list”) phase. Plans provide us with the direction, focus, and organization we need to stay on task. And since none of us
here at the Pole have perfect memories, we make sure they’re *written* action plans.

We develop our plans by answering six questions for each set goal:

1. **WHAT** needs to be accomplished?

2. **WHY** does it need to be done? (How does it contribute to our overall mission?)

3. **WHEN** does it need to be accomplished?

4. **WHERE** am I/are we now in relation to this goal?

5. **WHO** will be involved in accomplishing this?

6. **HOW** will it be accomplished? (What specific steps and activities are involved, and what resources are required?)
After answering these questions with as much detail as possible, we perform the last of the planning activities: adding contingencies. We do our best to anticipate the unexpected by asking “but what if…” questions. 

But what if the snowfall is way above or below normal this year? But what if a flu bug works its way through the shop during peak production time? But what if
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the computer with our delivery address book crashes? Certainly we can’t predict all the obstacles we may face, but combining some thought with past experiences does enhance our readiness to deal with Murphy’s Law.

Work Your Plan

None of us here at the workshop are particularly fond of negative surprises—especially me. They take the twinkle right out of my eyes. Fact is, we face enough challenges already without manufacturing any more on our own. So we don’t wait until estimated completion dates to see if we’ve reached our goals. Once we make our list (plan), we check it twice. Actually, we check it a lot more than twice.

We schedule (as in, set specific times on our calendars) frequent progress checks as part of the work-planning process. I meet with teams and individuals—and they meet amongst themselves, without me—to measure the status of our goals against predetermined progress
“benchmarks.” At those meetings, we ask the following:

- **Is each goal still valid and doable?**

- **Are we where we should be in terms of attaining each goal?**

- **Have any conditions or circumstances changed since we originally set each goal?**

- **Do we need to make any changes to our goals, our action plans, or our performance levels?**

The answers to these questions provide the intelligence we need to guide us in bringing our important mission to life.

As the sign on our workshop wall says:
If We Want to Hear Jingle Bells
Ringing on the 24th, We Need to Set
and Live by Goals...All Year Long!

Make the Most of What You Have

There’s another sign hanging in our workshop. It reads:

So Many Toys, So Little Time

It serves as a reminder for us (and a clue for you) about
overcoming big challenges and accomplishing big goals: you have to maximize the resources available to you.

Goal setting—planning your work and then working your plan—not only leads to effectiveness, it also fosters efficiency: it helps you minimize waste. And if there’s one thing we hate around here, it’s waste. Considering the volume of orders and deliveries we deal with annually, we’d quickly go out of business if we didn’t make the absolute best use of our resources: time, money, materials, and the talents of our elves and reindeer.

Because resources are so important to us, we’ve gone well beyond merely relying on goal action plans to ensure efficiency. The best example of this is a workshop-wide team we created called “Waste Watchers” (no connection to my “bowl full of jelly” belly!). The sole purpose of the group is to identify and eliminate inefficient or wasteful business practices. The following presents just a few of the strategies they’ve come up with to help us do more with less.
MAKING THE MOST OF TIME

- Prioritize tasks (do the most important things first) and use “to do” lists to organize daily activities.
- Start and end meetings promptly—and issue agendas in advance.
- Teach time-management skills and techniques.
- Take advantage of timesaving technology.

MAKING THE MOST OF MONEY

- Buy in discounted bulk whenever appropriate.
- Shop for the best prices on materials, supplies, equipment, and services.
- Communicate electronically to reduce long-distance charges.
- Think pennies as well as dollars—a few cents saved here and there add up quickly.

MAKING THE MOST OF MATERIALS AND EQUIPMENT

- “Measure twice, cut once.”
- Reuse and recycle whenever possible.
- Be religious about preventative maintenance.
- Invest in extended warranties.
MAKING THE MOST OF EMPLOYEE TALENT AND EXPERTISE

* Involve the people with the knowledge in the decisions.
* Match jobs with worker skills and interests.
* Enhance employee expertise through training and developmental assignments.
* Encourage employees to share their knowledge with others.

SANTA SUMMARY:
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- Plan Your Work
- Work Your Plan
- Make the Most of What You Have