



## Using CPS For Logistics Planning

by Keith Kaminski

Logistics is defined as “the managing of the details of an undertaking.” When these behind the scenes details are managed correctly, they are nearly invisible to your clients. Poor logistics planning makes you and your organization look unprepared and inefficient. Managing these details is a basic and fundamental component in almost any type of work. However, they may be easily overlooked by only focusing on the highest priority tasks (i.e. landing a keynote presenter for your conference or marketing to increase attendance in your training course).

As a Program Manager for CPS-B, one of my responsibilities is to manage logistics for the services we provide to our clients. Provided in this article are some general logistics tips through the use of Creative Problem Solving (CPS). I have found that the following techniques for using common CPS tools is a practical and easy way to accurately prepare for the details.

This process is especially useful when preparing for complex events such as a conference or training course. Assuming you have the design in place for what needs to be accomplished (i.e. we are offering our training course in nine months), generate options for tasks that need to happen to ensure success. (CPS is also useful for developing your project). Be sure to use the guidelines for generating options (defer judgment, strive for quantity, seek combinations, freewheel). Here, I recommend the use of a modified Morphology Matrix. Some sample options for each parameter are included in the figure below.

### Logistics Planning Matrix

Before	During	After
Gather supplies	Meet with John Doe	Create summary report
Book travel arrangements	Take pictures of event	Send thank you letters
Have team briefing meeting	Ensure break food and coffee are ready by 10:30 each day	Submit expenses to accounting
Edit John Doe article	Manage registration table	Debrief experience
Send products to hotel	Inventory materials	Team celebration party

During this generation phase, it will be helpful to call on the support of your colleagues. Their suggestions for what needs to be done may reveal very important “to do’s” you might have missed. If you are fortunate enough to have

this support, create three flip chart pages and label them: Before; During; and After. Use Post-it® notes to generate your tasks. This technology allows you to generate at a faster pace when using a group.

Once you feel that you have a significant number of details in front of you, choose all the options that must get done to make your project a success. Be sure to follow the guidelines for focusing options (use affirmative judgment, be deliberate, stay on course and consider novelty). It is possible that each option generated is a task that must get done. However, some of the options may be too general (i.e. gather supplies). Pull out these important, but general, options from the matrix and expand on them. If “gather supplies” needs to get done, then generate a list of supplies that need to be collected. Once you have chosen the supplies that you need, be sure to create a checklist. This helps to avoid asking yourself the question: “am I forgetting anything?”

Now you have three long lists of tasks that need to be accomplished before, during, and after the event. You’ve expanded and further developed the tasks that need more detail. Now what? To further refine your logistics plan, I recommend prioritizing the tasks in each parameter (before, during, and after) using the Short, Medium, and Long (SML) tool. When using the SML, it is important to designate time frames. This clarifies time deadlines for when tasks need to be completed. If you have used Post-it® notes for your generation, you can easily transfer them to an SML created on a flip chart. The table below provides an example of how the SML tool might be used to prioritize tasks before the event.

### Logistics Planning: “Before the Event”

Short Term (1-3 months)	Medium Term (3-6 months)	Long Term (6-9 months)
Book travel arrangements	Buy supplies using checklist.	Send products to hotel
		Edit John Doe Article

For very large and complex projects (i.e. conferences with over 1000 people in attendance), you may need to go one level deeper in your logistics planning. Here, using the Goal Directed Project Management (GDPM) method may be helpful (see reference for ordering information).

You have spent the time to plan out the details. Your project was a success - you truly met your client’s needs. What now? *After the project, debrief the experience.* Being explicit and deliberate about debriefing your experience deepens your learning. You will be better able to reach new levels of success next time you prepare for a project. This is a helpful way to get ready for the next project and/or to help a colleague with his/her project. Following the ALUo

(Advantages, Limitations, Unique Qualities, and Overcome Limitations) tool format provides a simple structure. Write down your personal thoughts along with your team's (if applicable) of what worked well (advantages). After you've generated a good list, move on to discuss what needs to be improved (limitations). When phrasing limitations, state them in the form of a question like "How to..." or "In what ways might I (we)..." This invites you to problem solve the options. Next, record what happened that was unexpected (unique qualities) and lastly, describe what you would do to improve next time (overcoming limitations).

For those readers who are familiar with CPS, I hope this article provided you with some insights into another way, which CPS can be customized to meet a challenge. For those readers who are unfamiliar with CPS, and want to learn more, visit our web site at: <http://www.cpsb.com>. Click on "Services" and follow the link to "Upcoming Courses". Here you'll find the up-to-date schedule of CPS training. I wish you the best of luck in planning all of your events!

**References:**

- Isaksen, S.G., Dorval, K.B., Treffinger, D.J. (1998). *Toolbox for Creative Problem Solving: Basic Tools and Resources*. Creative Problem Solving Group-Buffalo. Williamsville, NY
- Nuefeldt, V., Guralnik, D.B. (1988). *Third College Edition: Webster's New World Dictionary of American English*. Webster's New World. New York, NY.
- Andersen, E.K., Grude, K.V. (1984). *Goal Directed Project Management: Effective Techniques and Strategies*. Kogan Page Limited. London, UK.