

## Planning, Prioritization & History Records

*Boston, Massachusetts (USA)*

*25 - 29 August 2025*

UK Training

# PARTNER



## Planning, Prioritization & History Records

Code: LM28 From: 25 - 29 August 2025 City: Boston, Massachusetts (USA) Fees: 5700 Pound

### Introduction

This training course equips participants with the essential skills for effective planning and prioritization while highlighting the value of maintaining historical records for continuous improvement. Participants will gain expertise in creating strategic plans, prioritizing tasks based on urgency and impact, and utilizing historical data to inform future decisions and avoid past errors.

### Course Objectives

By the end of this course, participants will be able to:

- Develop comprehensive strategies for short-term and long-term planning.
- Prioritize tasks effectively based on their urgency and significance.
- Leverage historical records to inform decisions and improve outcomes.
- Implement tracking systems for maintaining and analyzing historical data.
- Recognize the impact of planning and prioritization on achieving organizational goals.

### Course Outlines

#### Day 1: Introduction to Planning and Prioritization

- Definition and importance of planning and prioritization.
- How planning and prioritization contribute to organizational success.
- Types of plans: strategic, tactical, and operational.
- Key factors that influence effective planning.
- Tools for prioritization, such as the Eisenhower Matrix and ABC analysis.

#### Day 2: Strategic Planning Techniques

- Steps in creating a strategic plan.
- Setting SMART goals Specific, Measurable, Achievable, Relevant, Time-bound.
- Identifying and tracking key performance indicators KPIs.
- Aligning resources with priorities.
- Adjusting plans in response to internal and external changes.

#### Day 3: Prioritization Frameworks and Tools

- Overview of prioritization techniques, including the MoSCoW Method and Pareto Principle.

A graphic of a chessboard with several chess pieces (a king, a queen, a rook, and a pawn) in gold and silver. The text 'UK Training PARTNER' is overlaid on the board.

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- Practical application of the Eisenhower Matrix for task prioritization.
- Using scoring models for effective decision-making.
- Managing conflicting priorities in projects.
- Balancing long-term goals with immediate needs.

#### Day 4: Importance of Historical Records and Data

- The role of historical records in driving business success.
- Best practices for maintaining accurate and accessible records.
- Learning from past successes and setbacks.
- Incorporating historical data into planning and decision-making processes.
- Case studies of effective use of historical data for improved outcomes.

#### Day 5: Implementing Planning and Prioritization in Practice

- Creating actionable work plans based on prioritization frameworks.
- Tracking progress and adapting plans as needed.
- Establishing systems for recording and analyzing historical data.
- Group activity: solving a real-world scenario using planning and prioritization tools.
- Review, feedback, and closing discussions.

A graphic of a chessboard with several chess pieces (a king, a queen, a rook, and a pawn) on it, set against a background of concentric circles. The text 'UK Training PARTNER' is overlaid on the right side of the board.

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