

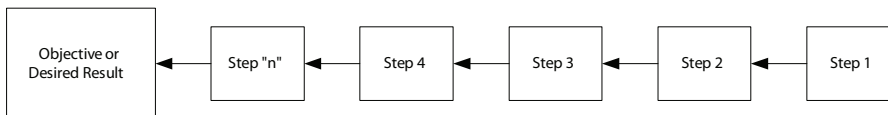


Action Plan Writing Instructions

An Action Plan is a simple tool for managing an implementation or change in a process or organization. It includes a statement of the objective and the detailed action steps needed to achieve that objective.

To create an action plan, the following steps might be useful:

- 1) Describe what your current situation is – the starting place
- 2) Envision in a broad sense what the outcome is when that project is complete including what some of the actual deliverables will be.
- 3) Review the objective; this is what you are trying to achieve. It can be a strategy from a strategic plan that you may have been assigned. In addition, the objective can come from any improvement objective that may come up.
- 4) Review the key measure is what you use to determine whether you have completed your strategy or not. It should also try to capture the effect of the strategy's implementation. The key measure can be as simple as "it's done" or "it's not".
- 5) Identify the project manager; by the way that might be you.
- 6) To identify the action steps that go into the "What" column of the action plan form, start by asking yourself, "what do I have to do get accomplish this objective and the associated deliverables specifically?" Brainstorm a list of those potential action steps. Put these ideas on a notepad or flip chart.
- 7) Once you have your brainstormed list and have "pruned it" a bit, put your action step list in sequential order



Another method for putting the action steps into the right order is to create a process flow diagram of the activity. Look for the critical path, the activity that needs to occur to accomplish the objective. Also look for the contingencies and not which activities are dependent on other action before they can happen.

- 8) Evaluate your action steps and edit as needed.
- 9) Now move your action steps from your notepad and place each step into the "What" column of your action plan form.
- 10) Identify any dependencies or contingencies between action steps and reorder the steps if needed.
- 11) For each action step listed in the "What" column, identify whether you or someone else will perform that step. List in the "Who" column who will be responsible for that step.
- 12) Identify significant resource needs if needed for the activity. These resources can be tools, time, training, other people, etc.
- 13) Identify when each action step is to be finished by or due by.
- 14) Talk with the people you need to assist you and gain their commitment.
- 15) Gain agreement with your boss or leader that your action plan is ready to implement.

Custom vs. Canned Action Plans

Action Plans are not always custom made for any objective that is out there. Sometimes we have similar objectives face us and we use the same old action plan we did before to work the project.

Custom action plans are made for things like building a custom fireplace, for a specific person's, presentation skill development, or when someone is getting married action plan.

In other situations, the same action plan can be used repeatedly. It becomes a "canned" or "off the shelf" action plan because of its wide use and application. 7 step problem solving, SMED, constraint analysis and removal, SOPs, etc. are all "canned" action plans. However, the very first 7 step problem solving action plan was custom. Now because of its wide use, it is used repeatably and has become a "canned" action plan.

Tips for Action Plan Creation

1. Get a bunch of people involved in helping identify what the project's activity should be.
2. When you brainstorm the list of activity, don't worry whether they are in the right order. It's easier when you don't try to brainstorm and put things in chronological order at the same time.
3. If you have multiple deliverables for the project, brainstorm the activity per deliverable. When you have the first one done, move to the second deliverable. This ensures that you have captured activity the produces all the required deliverables. You can combine the lists later.
4. Have a least a dozen action steps. If you can't come up with at least a half a dozen, maybe you don't need an action plan. But, if your activities are too broad, you may be able to break the broad activity into steps. For example, "bake cookies" might be a broad activity. And it can be broken down into small steps to help those who have no idea what that means.
5. If your activity list is really long, consider creating multiple action plans. Maybe your project can be broken into sub objectives with action plans for each. For example, if your objective is "build a house", your action plan might be a huge list. If you break "build a house" into sub objectives like "get a house plan", "prepare the building site", "build the foundation", "frame, roof, and install windows/doors", "side the house", etc. you would have a separate and shorter action plan per sub objective. It's easier to create and manage as a result.
6. Let me repeat this, if you can't figure out the action steps yourself, get a group of people to help you brainstorm the items and put them in the right order. There is nothing wrong with asking people to help you figure it out.

Keep in mind that when you start a project, you don't know what you don't know. As the project progresses, you learn things that will impact your action plan; you will have to adjust the plan as you learn.

What you assumed to be a simple project, can grow into something that is more complicated and costly than what you had originally expected. The opposite is also true – sometimes we assume that something will be complex and difficult and find that it was much simpler to complete than we had imagined. And that is not only OK, it is to be expected. It's normal to learn and to adjust.