

Action Plans

Small Scale Planning

So, you know that you need to produce a newsletter, organize a team-building session, put together a bid for a new piece of work, or organize moving Jenny's team up to the second floor. Exactly what do you need to do to achieve this?

None of these are major projects. In fact, you can probably think of all the steps in your head right now. But how do you ensure that you really have covered everything? Would anyone else know where you'd got to with the work if you were unexpectedly off sick for a few days? And are you quite clear about when you need to start if everything is to be done and dusted by the deadline?

An Action Plan is a simple list of all of the tasks that you need to carry out to achieve an objective. It differs from a 'to-do-list' in that it focuses on the achievement of a single goal.

How to Use the Tool:

Wherever you want to achieve something significant, draw up an Action Plan. This helps you think about what you need to do to achieve that thing, so that you can get help where you need it and monitor your progress.

To draw up an Action Plan, simply list the tasks that you need to carry out to achieve your goal, in the order that you need to complete them. This is very simple, but is still very useful!

Tip:

A useful mnemonic that you can use to help you check that you've remembered all the types of task that might be needed to meet your goal is SCHEMES. This stands for:

Space
Cash
Helpers/people
Equipment
Materials
Expertise
Systems

You may not need all of them to meet some goals: a small internal project to streamline the format of your team's reports, for example, only requires "people", "expertise" and "systems".

Keep the Action Plan by you as you carry out the work and update it as you go along with any additional activities that come up.

If you think you'll be trying to achieve a similar goal again, revise your Action Plan after the work is complete, by changing anything that could have gone better. Perhaps you could have avoided a last-minute panic if you'd alerted a supplier in advance about when and approximately what size of order you would be placing. Or maybe colleagues would have been able to follow up on the impact of your newsletter on clients if you have communicated with them about when it would be hitting clients' desks.

Tip:

Action Plans are great for small projects, where deadlines are not particularly important or strenuous, and where you don't need to co-ordinate other people.

As your projects grow, however, you'll need to develop project management skills. This is particularly the case if you need to schedule other people's time, or complete projects to tight deadlines.

Key points:

An Action Plan is a list of things that you need to do to achieve a goal. To use it, simply carry out each task in the list!