

How to use the Action Plan Template

Here's how you can use the Action Plan Template:

1. Brainstorm and identify specific tasks

Brainstorm the tasks you will need to accomplish in order to achieve your goal. For many teams, it can help to start at the beginning and work your way toward the end. What's the first step? Once you finish the first step, what's the second? Think about timelines and stakeholders, and build in time to iterate and review.

2. List the tasks and identify what's needed to complete them

Drawing on your brainstorm document, think about how you can work more efficiently. Have you listed a task that isn't necessary to complete your goal? Is there something that you can delegate? Do you need more resources?

3. Use SCHEMES to double-check your action plan.

SCHEMES is an acronym that allows you to verify that you have everything you need to complete a plan. It stands for Space, Cash, Helpers, Equipment, Materials, Expertise, Systems.

4. Prioritize the tasks

With all of your necessary tasks laid out, it's time to put them in order and prioritize. That means identifying which tasks need to be completed first for the later ones to be possible, and also which are most important and integral to achieving the end goal.

5. Set deadlines and milestones

An action plan is all about action and getting things done, so it's crucial to set deadlines for each task and overall milestones for your project. This will keep you on schedule and focused on achieving your goals.

6. Complete each task with the end goal in mind

Remember, the purpose of your action plan is to achieve a goal or implement a strategy, so every part of the plan should be geared towards that. Don't just mindlessly churn out tasks; complete tasks in a way that will make later tasks easier and that is geared towards what you're trying to accomplish.

FAQ about action plans

How do I write an action plan?

Action planning simply requires listing each task step-by-step that is necessary towards achieving an overall goal or strategy. Identify the goal, create actionable tasks, and give yourself a specific time frame or due date to achieve each task.

What is a smart action plan?

A SMART action plan is simply a variation of the traditional action plan with a focus on goal setting and creating more actionable and specific goals (“SMART goals”). SMART is an acronym that stands for several variations. Here’s an example: S: Specific M: Measurable A: Actionable R: Realistic T: Time-bound