



Action Planning

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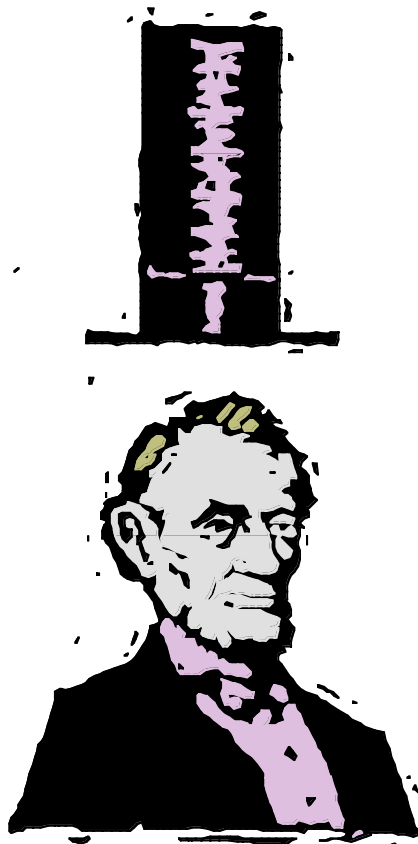
Definition

- action plan: a tool that transfers working ideas into a map
- the map is employed to:
 - solve problems
 - overcome adversity
 - improve performance
 - achieve a goal
 - lots more!

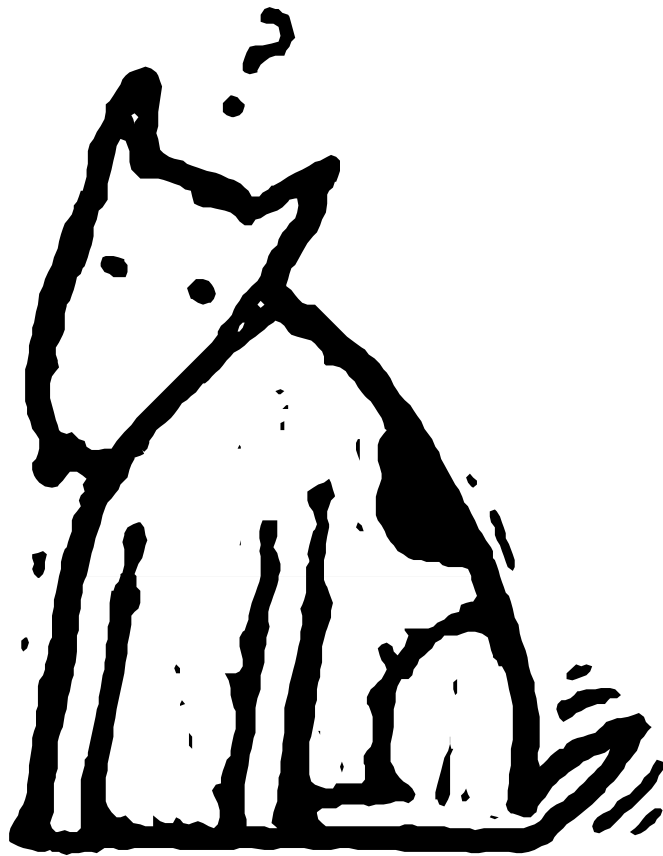


Purpose

- provide a positive link between problem identification and problem correction



Philosophy: Before Action Planning, Ask.....



About the situation

- what is expected to happen because of this plan?
- what is the simplest way to accomplish my objectives?



About the end goals

- will this plan improve:
 - job performance?
 - work processes?
 - customer service?



About the setting itself

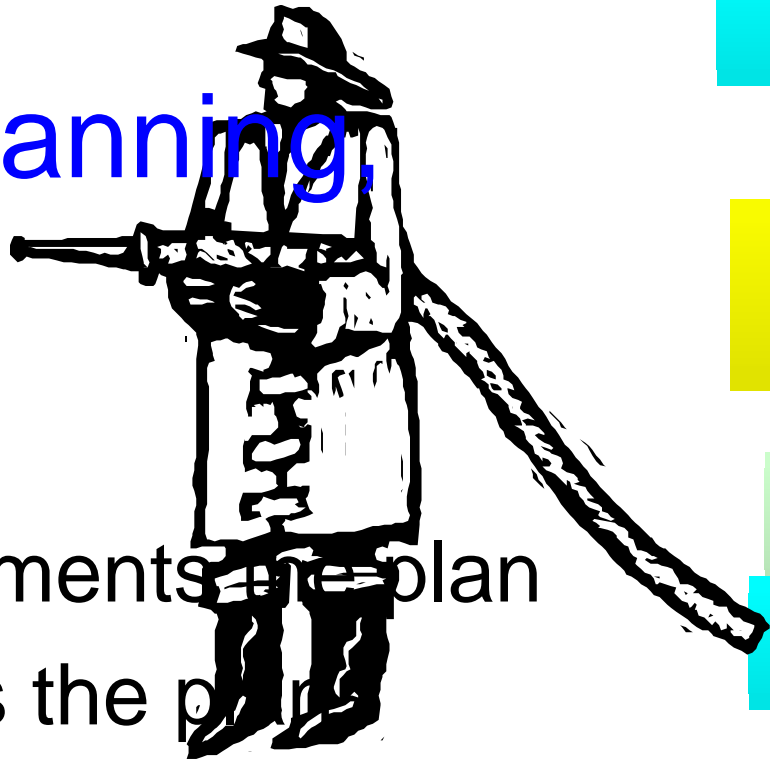
- does the organization support the requirements for this action?
- does the organization have the energy and assets to carry the plan through to success?
- will this plan be supportive of local TQM programs?

Who needs action plans?

- individuals
- work groups
- departments
- applied to a certain level of people (all case managers, etc.)



Before planning, decide...



- who implements the plan
- who tracks the progress
- who reviews the plan
- how to forward the plan up through the chain of responsibility first
- how various levels of responsibility can view, add to, critique the plan

When reviewing an action plan ask if it ...

- is in line with my perceptions?
- coincides with audits, reviews ?
- builds on recent training, TQM, important organization needs?
- suggests realistic assets, plan, milestones, schedule?
- builds on the strengths of the group?

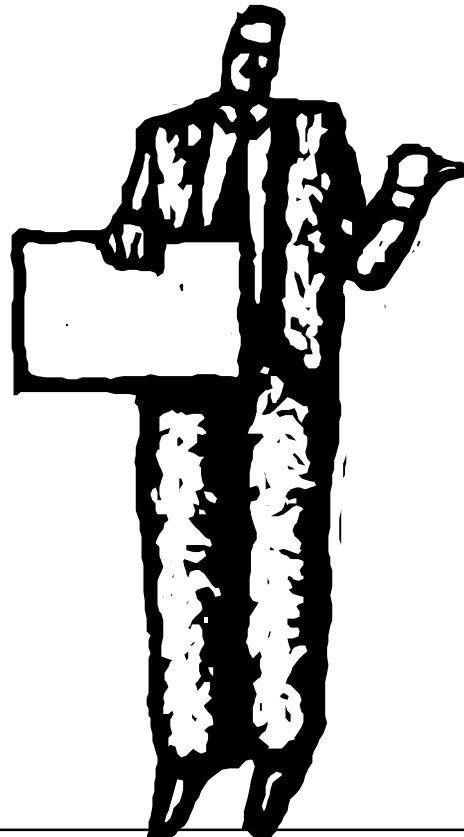
Drafting an action plan

- heavily involve the person/group covered by the plan
 - they'll be more receptive if they had input
 - they know more about the problem
 - they'll see someone cares about it



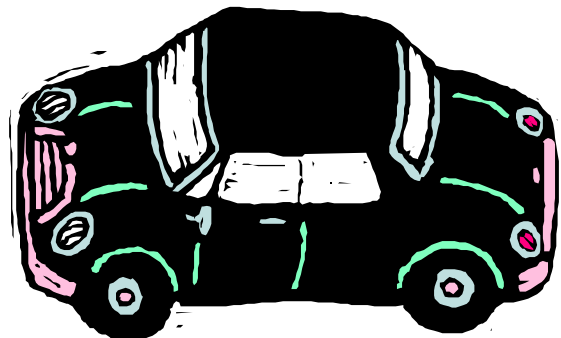
Research the topic

- nature of the problem
- how long
- who/what is involved
- what are the costs
- what has been tried here
- tried elsewhere
- possible solutions
- best solution



Action planning questions

- what is the best solution to the problem?
- when does the plan begin?
- what are the check and completion times?
- what will the person(s) do?
- how can I support this
 - directly or with outside resources
- resources?



A few more points...

- number of plans in force governed by...
 - ability to execute, track, complete
 - important problems first
 - safety? production? quality? customer service?
- ensure skills, knowledge, material
- one person responsible for the execution of the plan

What if people fail to follow the plan?

- some people indeed do not cooperate
- consider a 'special review' if the plan is not being carried out
- assess barriers to continued action
- obliterate (barriers, not people)



Action plan advantages

- initiated by a supervisor
- deals with one problem at a time
- documents a project from the beginning
- offers redirection if fails

Action plan format

- Name & Department
- Action Area
- Reason for Action
- Responsible Person
- Team Members
- The Actions
- Assets Required
- Potential Barriers
- Milestones
- Check-back Date
- Completion Date
- Additional Action

Action Plan

Name:
Department:
Phone:

Today's Date:

Action Area:

Assets Necessary:

Reason:

Person:

Plan:

Milestone Dates:

Check-back Date:

Completion Date:

Action plan example

- Name: Carmen
- Action Area: presentation
- Reason: CEO request
- Person: Audrey
- Plan: literature review; compose slides; present
- Assets: books; software; six hours
- Milestones: 8/1 research; 8/15 draft
- Check-back: 9/1
- Completion: 9/26
- Add'l Action: 10/15 assess evals and restructure

Action plan exercise

- Use your handout
- Choose a situation
- Construct and action plan
- Put your name on it
- Send it forward
- We'll talk about some of them

Critique the plans

- as a plan evaluator
- as one who will implement the plan



Bibliography

- Johnson, R. & Kazense, L. (1993). TQM: The Mechanics of Quality Processes. Milwaukee, WI: ASQC Quality Press, pp. 219-226.
- Plunkett, L. & Fournier, R. (1991). Participative Management. New York: John Wiley & Sons, Inc. p. 217-218.