
Action Planning

Training Module

Mapping the action steps to victory

This training module was developed by ICA colleagues Jim Troxel and Karen Snyder when they were part of Millennia Consulting, circa 2007, and was used in the DePaul University Facilitation Certificate Program.



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Mapping the action steps to victory by the team that will be implementing the plan

With Action Planning a team or workgroup is interested in putting into action an agreed upon course of direction. In other words, it works best when there is already a significant degree of consensus about what is needed – what the objectives are. The question remaining is one of how to do it. With the objectives in mind, the team can now build an action plan to realize those objectives.

Having an action plan for a team is similar to “project management.” Many project teams work without any guidance on how to create a realistic and useful project plan, how to monitor project progress, or how to respond to necessary changes in the plan. Action planning provides project teams with a process that helps them coordinate their efforts so they can create the right response to their project – at the right time and within the resource limits established. Project Action Planning includes many kinds of projects of a broad range, from simple to very complex. One does not have to be a trained project manager to lead and work on team projects. All the members of a project team are expected to understand, participate in, assist in building, and carry out a project action plan.

A common misunderstanding of many project teams is to think that once they have shaped a vision for their project and perhaps have created some recommendations and suggestions for its implementation, their work is through. However, their work is only half done. The next phase of the process is the actual implementation of the vision; and lastly the team will measure what difference their project’s implementation has made compared to where things were at the beginning.

But it is Project Planning that gets the team from vision to implementation. That’s why it is the most critical stage for the team. Everything up to this point has been “prelude” to the real work of putting into place a series of actions that will result in a new state of affairs. The techniques in this module will help team members clarify action components, align team resources, designate roles and responsibilities for implementation, and build team trust and support.

Learning Objectives

- To learn the steps to build an action plan.
- To gain practice in the action planning process with the team.
- To feel confident in having the skills necessary to complete a project or action plan
- A common misunderstanding of many project teams is to think that once they have shaped a vision for their project and perhaps have created some recommendations and suggestions for its implementation, their work is through. However, their work is

Steps in the Action Planning Process

There are five basic parts to building an action plan:

- Opening: Setting the Context
- Step One: Clarifying the End Result and Major Deliverables
- Step Two: Brainstorming the Key Actions
- Step Three: Creating a Timetable of Actions and Assignments.
- Closing: Reflecting on the Implications of the Work

Generally, it takes about two hours for teams of 6-10 people to build a project action plan together.

Opening

Setting the Context

One of the Co-Leaders (or Team Members), playing the role of facilitator, sets a context for the purpose of the time together. The facilitator outlines the time and the steps in the process the group will be going through together. The facilitator explains what is already known or has been decided about the project, such as who, what, when, where, and/or how. These might be posted on a butcher paper or newsprint.

Step One

Clarifying the End Result and Major Deliverables

In the previous step of the project process, the team decided on a Measurable Goal. The Action Planning process begins with an elaboration of what that measurable goal will look like. The facilitator might ask such questions as:

- What will it look like when we complete this project?
- Imagine what will be different the day we get this project in place.

The objective is to get as many specific images as possible of the desired result. All these responses should be written on the newsprint. The end-date should be clear to everyone.

Now it's time to do a "reality check." The facilitator leads the group in a quick brainstorm of the SWOT analysis – Strengths, Weaknesses, Opportunities and Threats. With newsprint ready, divided into four columns with the labels of the four categories already written., the facilitator asks the SWOT questions and records the responses.

The point here is to do a reality check before simply beginning to brainstorm actions. The facilitator might ask, "What does the current reality reveal about our objective?" It is possible, based on this analysis, that the team may opt to make revisions in the originally agreed upon vision.

SWOT QUESTIONS

Strengths – "What do we have going on our side as a positive as we begin to implement our goals?" (advantages, capacities, assets)

Weaknesses – "What are our shortcomings as we proceed to implement our plan?" (deficiencies, frailties, liabilities)

Opportunities – "What will be the benefit to us and the students whom we serve if we were to put this project in place successfully?" (gains, profits)

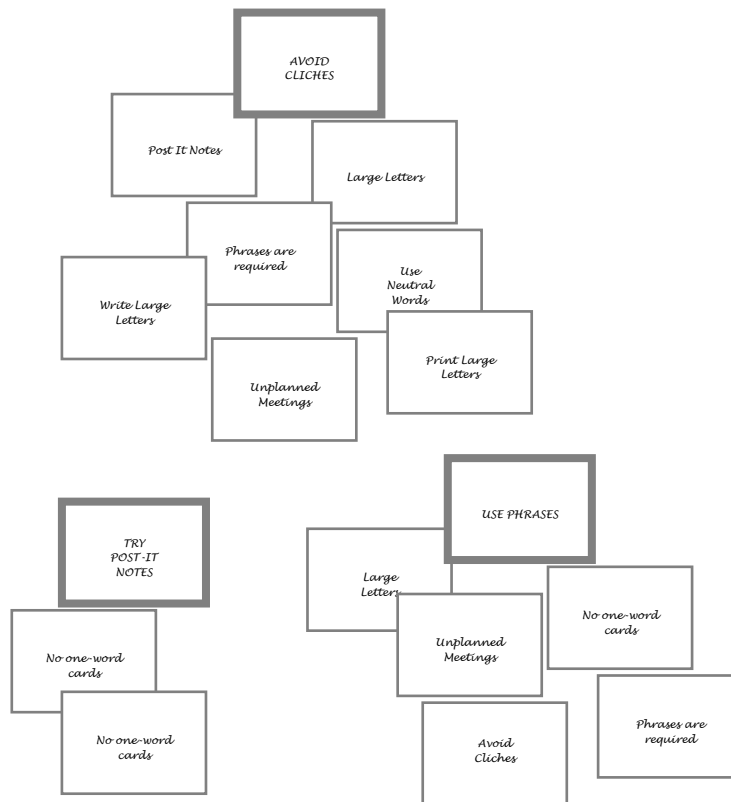
Threats – "What are some potential landmines we need to avoid or circumvent as we begin to move forward? (hazards, pitfalls)

Step Two

Brainstorming Key Actions

For Step Two your team may either use the Workshop Method or the Affinity Process. Procedures for the Affinity Process can be provided. The focus question is: “What are the action steps we need to take as a project team to implement our measurable objective in light of our analysis of the current reality?”

The facilitator needs to have all the ideas from all the team members grouped according to similar action and to name or title those similar groups with the name of the general action title, such as “Train Employees in New Method”, or “Build Support for our Idea”. Each title should start with an action verb. Titling the actions in this way will greatly enable the next step in the process.



Step Three

Creating a Timetable of Actions and Assignments

Now the fun part begins. Normally, the team will end up with about 4 to 6 categories. The facilitator needs to ask the team members which category they want to work on. Each cluster of actions should be assigned to a person or small team (2-3 people) who will actually do the implementation of those brainstormed ideas. Every team member needs to be associated with at least one (and maybe just one) action arena. Make sure that all the tasks are assigned to some individual or group that is present at the time of this exercise.

While the smaller groups are doing this work, the facilitator is rearranging the front of the room so that a wall-sized time-line is created beginning with the current date and ending with the deadline date of the project. The completion date is on the right and the current date is on the left. The time difference might be two or three months or it might be longer. It should not be longer than six months. In any case, the facilitator should have place cards arrayed across the top indicating the appropriate time segments, such as "May, June, etc."

When the small groups are ready, have them come to the front and mount their cards sequentially underneath the time header cards. When each subgroup's actions are on the calendar, each group reports to the whole team on its actions. The group reviews the whole calendar, looking for points of conflict or convergence involving time or personnel. A coordinator for each action thread might be chosen.

INSTRUCTIONS TO SUB-ACTION GROUPS

- ✓ Take all the ideas that were brainstormed.
- ✓ Add, discard, combine or modify the ideas to "round-out" the plan of action for your arena.
- ✓ Stage them sequentially in a logical progression.
- ✓ Put a specific deadline on each action card.
- ✓ Write the person or group's name that is going to actually do that step.

Closing

Reflecting on the Implications of the Work

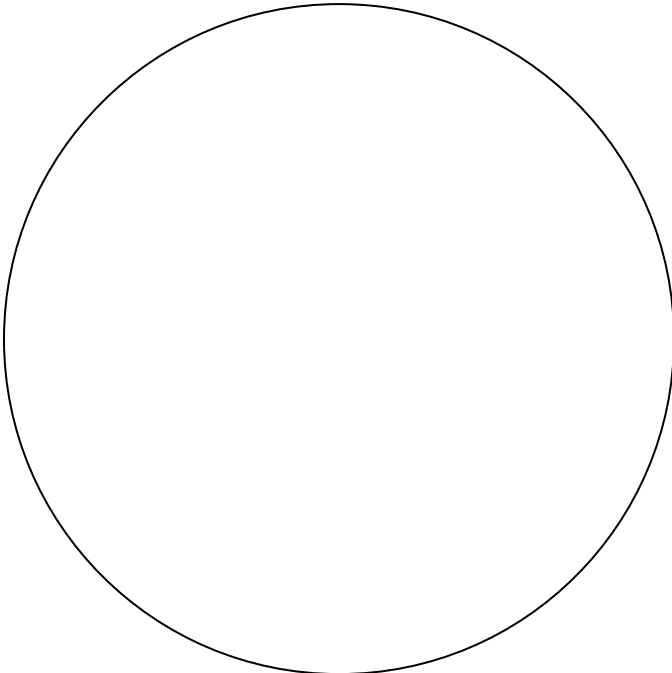
A brief reflection on the action planning process itself allows the group to step back from the timeline and reflect upon their activity as a group and the implications the completed project will have for their organization. This broadens the group's perspective, reminding them that there are several key actions to accomplishing the victory. It takes them back to where they were when they began the process, reminding them of why they decided it be a part of the process in the first place.

Some questions the facilitator might ask include:

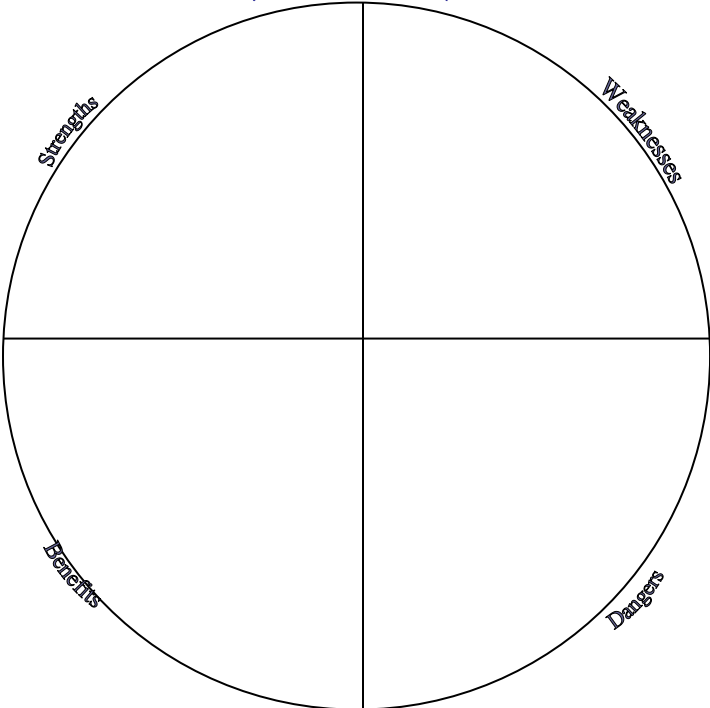
- What stands out for you from our time together building our Action Plan?
- Where do you sense we had a breakthrough in our thinking?
- What are you personally looking forward to as we begin to implement this plan?
- If we were going to give this effort a catchy title, campaign name or visual image of the task ahead, what might we create?
- What will be the significance of accomplishing these actions?

Action Planning Worksheet

Victory Circle



Reality Check



Calendar of Actions and Assignments

SUB GROUP ACTION ARENA	MONTH 1 MILESTONE	MONTH 2 MILESTONE	MONTH 3 MILESTONE	MONTH 4 MILESTONE	MONTH 5 MILESTONE	MONTH 6 & VICTORY CIRCLE
A						
B						
C						
D						
E						
F						

KEEP THE ACTION PLAN ON TRACK

Build and Sustain Momentum

- Establish rhythm of planning, accomplishments, celebration
- Plan an early, easy, visible success
- Keep the purpose before the team

Keep Everyone Informed

- Report regularly on progress
- Have someone document each meeting to keep all members informed
- Keep wall calendar updated and posted; use as decor


Update the Plan Regularly

- Each meeting check off action steps taken
- Adapt the plan in response to new information or changes in situation
- Keep ongoing record of accomplishment to remind of progress
- Focus the team's attention on places where plan is blocked

Motivate the Team

- Acknowledge all the little accomplishments and efforts
- See that everyone has an assignment
- Use failures as learning opportunities

ACTION PLANNING PROCESS

	Rational Objective: To build a plan focused on implementing the vision of the project	Experiential Objective: To have everyone feel they have buy-in to the planning		
<p>OPENING Set the Context</p> <p>Have three flipchart pages on wall:</p> <ol style="list-style-type: none"> 1) focus question 2) victory circle 3) reality check <p>State:</p> <ul style="list-style-type: none"> - purpose - process - product - time 	<p>STEP ONE Clarify the Victory and Reality</p> <p>Create a Victory Circle: Brainstorm vision in relation to the focus question, writing responses on victory circle</p> <p>Dialogue about Current Reality: Brainstorm strengths, weaknesses, opportunities and threats on third newsprint</p> <div style="text-align: center;">  </div> <p>Ask, "What does the current reality reveal about our anticipated victory?"</p>	<p>STEP TWO Brainstorm Key Actions</p> <p>Ask, "What are the key actions we can do to move toward the victory of dealing with the focus question?"</p> <p>Have individuals write xx actions BOLDLY on cards</p> <p>Ask individuals to SILENTLY group actions on wall.</p> <p>As a group quickly title columns.</p> <p>Prioritize 3-5 goal areas to work on during the coming year.</p>	<p>STEP THREE Create Action Timeline and Assignments</p> <p>Create timeline on wall</p> <p>Put goals on left and measurable accomplishments on right</p> <p>Volunteer for goal teams:</p> <ol style="list-style-type: none"> 1. Write each implementing step on a card. 2. Phase cards across the timeline. 3. Create a catchy title, campaign name or visual image of goals 4. Designate a team coordinator and write names of team members on timeline <p>As a total group, report actions on each goal and make refinements</p>	<p>CLOSING Reflect on Work</p> <p>Time permitting, reflect on implications of this work together. Possible questions include:</p> <p>What stands out for you from our work together?</p> <p>Where do you think we had a breakthrough?</p> <p>What are you looking forward to?</p> <p>What will be different as a result of implementing these goals?</p> <p>What are clearly some next steps to implementing this plan?</p>
5 minutes	15 minutes	20 minutes	15 minutes	5 minutes