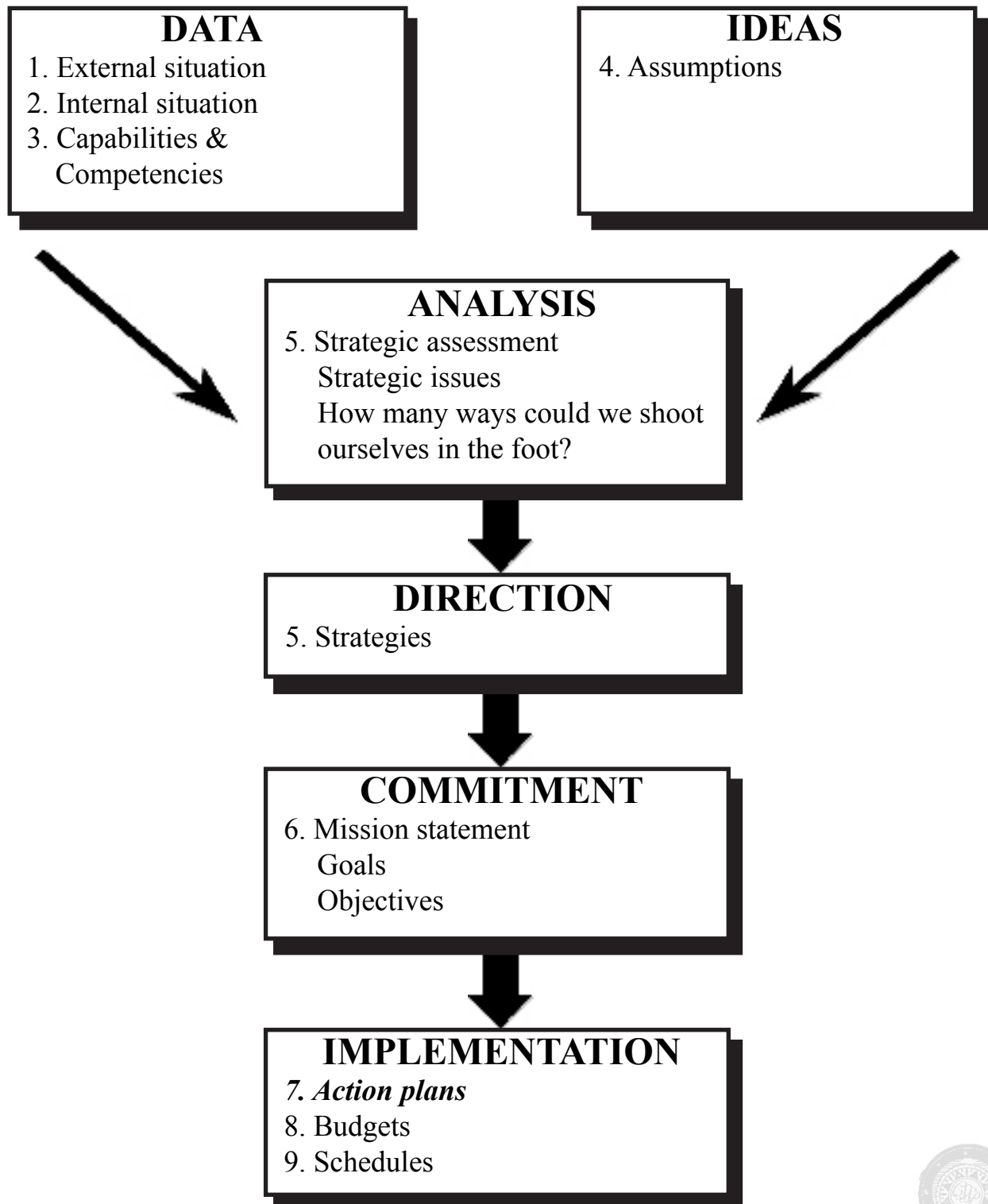


# SIMPLIFIED STRATEGIC PLANNING PROCESS FLOW





ACTION PLANS translate the vision and intentions laid out earlier in the process into results. This is a critical point in the process. An ACTION PLAN is to be written for each OBJECTIVE (6.3), and it must be carefully crafted in order to achieve the result stated in the Objective.

**Action Plans**

Page 7.n

**Action Number:**

The action number is a unique number that identifies each step of an action plan. The first number corresponds to the action plan number and the second identifies the particular step (e.g., 3-4 refers to action plan #3, step #4).

**Status:**

The status indicators are summarized in the table at the bottom of the page. They are used to track the progress of the plan. Steps will begin as approved (A) indicating that the team has reviewed them and authorized the action. As steps become Underway and then are Completed the indicator should be changed to “U” and then “C”.

**Action:**

In this column you should describe the action to be undertaken at this stage of the plan. The description must be written so that anyone involved in executing the step has a very clear understanding of what is to be done. Each step should begin with a strong action verb (avoid stating outcomes). Vague verbs such as “plan” and “implement” should be avoided. Do not write a plan to plan.

**People Involved:**

Identify the people involved in the action step. If acronyms are used (i.e., Exec Com), a key with specific individuals initials should appear at the bottom of the page.

**Time (Days):**

This should be an estimate of the time the individuals listed will require to complete the step. This should be time spent directly working on this action step, not start-to-finish elapsed time (i.e., If two days will be spent over a one week period, 2 days should be indicated, not 5 or 7 days).

When all people listed have the same time involvement, a short hand notation (“x”) can be used to indicate the time required (i.e., “0.5 x” means all people listed have a half day of time required). When individuals have different time requirements, then the individual times must be listed separately for each person on the step.

All measurements should be in days (not hours). Assume one day is equal to 10 hours. Rounding off to half day increments is usually sufficient precision.

If you find individual steps take more than 5 days to accomplish, consider breaking them down into smaller steps for greater clarity and more manageable increments.

**Money (\$):**

In this column estimate all non-budgeted expenditures required to complete the step. Money which is already built into the current budget need not be listed. Do not list salary for people already on the payroll.

**Start and Complete Dates:**

In these columns list the date when an activity is scheduled to start and be completed. Do not fill in these columns with the first draft of the action plan. These dates should be filled in at the last planning meeting after individuals have developed Personal Annual Schedules (9.2) and the Budgets have been reviewed. The dates indicated should be based on realistic estimates of available time and money necessary to complete the step.

**Action Plan Team**

Each Action Plan should be written by an Action Plan Team (typically 3-5 people). Two of the members (the leader and back-up) should also be members of the strategic planning team. Other members should be those who will have extensive involvement in execution of the Action Plan. This Action Plan Team will have responsibility for writing the action plan, managing the plan throughout its duration, and assuring attainment of the Objective.

**Writing Action Plans**

The following process should be used for writing all Action Plans. It is critical to the development of good Action Plans that time for careful thought and multiple revisions be built into the drafting process.

**Action Plan Writing Process:**

1. Assign responsibility (leader and a back-up) for writing the plan when the Objectives (6.3) are developed.
2. Leader and back-up should write a brief outline or flow chart of the action plan.
3. Create the Action Plan Team by selecting others who will have significant involvement in the execution of the plan based on the approved outline. This assures solid input and commitment.
4. Identify action items. On a separate piece of paper, flesh out the outline by listing all the things which must be done in order to accomplish the Objective. Do not worry about the sequence or resources at this time, just capture the ideas in a brainstorming session with the Action Plan Team.
5. Place actions in sequence order and assign resources; people, time, and money.
6. Write first complete draft using the form provided and described above.
7. Let the plan sit for one week. It is important to get some distance from the plan to be able to see it in perspective before you begin revisions.
8. Inspect the plan to assure;
  - a. all necessary steps are included and clearly understandable as to exactly what is to be done,
  - b. no unimportant or inappropriate steps are included,
  - c. the proper amount of the proper resources are applied,
  - d. the sequencing is properly coordinated,
  - e. completion of the ACTION PLAN as written will result in the achievement of the stated OBJECTIVE (including consideration of things that might prevent the achievement of the OBJECTIVE).
9. Distribute the revised draft to the entire strategic planning team for review and comment.
10. Revise action plan once more based on the input from the entire strategic planning team and distribute in preparation for final planning meeting.

# ACTION PLAN

Objective No:  
Objective:  
Priority:  
Team Leaders:

Action No.	Status	Action	People Involved	Time (days)	\$	Start Date	Completion Date

**STATUS: C = Complete; U = Underway; A = Approved**





## ACTION PLAN

**Objective No:** 1  
**Objective:** Have a new CRM system linked with e-commerce on line by \_\_\_/\_\_\_/\_\_\_.  
**Priority:** 1  
**Team Leaders:** RPB / HLR

Action No.	Status	Action	People Involved	Time (days)	\$	Start Date	Completion Date
1-1	U	Review software needs	MGRS	.5x	-		
1-2	U	Layout detail design and distribution requirements	BKS RPB HLR	2.5 1.5 0.5	-		
1-3	A	Analyze vendor proposals	RPB,HLR	-	-		
1-4	A	Take delivery on software	RPB	1	\$20,300		
1-5	A	Design/write/debug distribution software	RPB,AHD	2x	\$90,000		
1-6	A	Analyze outside software	RPB,HLR	3x	-		
1-7	A	Select personnel to evaluate software developed for operations	HLR	-	\$200		
1-8	A	Select outside software	HLR,JWB	.5x	-		
1-9	A	Select hardware and peripherals	HLR,JWB	.5x	-		
1-10	A	Define finance options	HLR	.5	-		
1-11	A	Order hardware	HLR	-	?		
1-12	A	Order Datamax	HLR	-	-		
1-13	A	Order outside software	HLR	-	-		
1-14	A	Prepare site	AHD,RSA	2x	-		
1-15	A	Train Newark personnel (parallel)	AHD,RPB	3x	-		
1-16	A	Hardware delivery and installation	AHD	1	-		
1-17	A	Software delivery and installation	AHD,RPB	1x	\$225,000		

**STATUS: C = Complete; U = Underway; A = Approved**







# ACTION PLAN WRITING PROCESS

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1. Assign responsibility
2. Write outline or flow chart of action plan
3. Create action plan team
4. Identify action items
5. Place actions in order and assign resources: people/time/money
6. Put action plan together...first draft
7. Let plan sit for one week
8. Review and revise action plan
9. Distribute plan to strategic planning team for feedback
10. Review, revise, and redistribute for final strategic planning meeting





## ACTION PLAN

**Objective No:** 5  
**Objective:** EDI  
**Priority:** 1  
**Team Leaders:** RPB / BKS

Action No.	Status	Action	People Involved	Time (days)	\$	Start Date	Completion Date
1	U	Customer requirements	Sales Team	20	-	9/1	9/10
2	U	Identify turn-key vendors of EDI solutions			-		9/10
3	A	Request proposals and schedule presentations	BKS	-	-		9/15
4	A	Analyze vendor proposals	BKSMgrs	1	\$20,000		9/20
		Negotiate					9/25
5	A	Plan installation	RPB	5			9/30
6	A	Test and debug new hardware and software	BKS	1 week	-	10/3	10/10
		Write procedures	RPB,BKS	3			9/30
	U	Acme trial		30			10/30
		Review	Mgrs	1x			10/30
		Train	RPB Cust Serv		-		10/20
		Fine tune procedures	RPB	.5x	-		12/1
	C	Implement EDI with Acme and Jones		-	-		on going

**STATUS: C = Complete; U = Underway; A = Approved**



