Action Planning Tool

An Action Plan is a list of tasks that you need to do to complete a simple project or objective. There are different ways of approaching an Action Plan, but we think the tool developed by Mindtools is useful for change initiatives (see www.mindtools.com for further information).

To draw up an Action Plan, simply list the tasks that you need to complete to deliver your project or objective, in the order that you need to complete them. There are three steps to follow:

**Step 1: Identify Tasks**

Start by brainstorming all of the tasks that you need to complete to accomplish your objective.

It’s helpful to start this process at the very beginning. What’s the very first action you’ll need to take? Once that task is complete, what comes next? Are there any steps that should be prioritized to meet specific deadlines, or because of limits on other people’s availability?

**Step 2: Analyze and Delegate Tasks**

Now that you can see the entire project from beginning to end, look at each task in greater detail.

Are there any steps that you could drop, but still meet your objective? Which tasks could you delegate to someone else on your team, or could be dealt with by a freelancer? Are there any deadlines for specific steps? Do you need to arrange additional resources?

Once you have done this, you can fill in the Action Plan template (over the page).

**Step 3: Double-Check with SCHEMES**

Use the SCHEMES mnemonic to check that your plan is comprehensive.

SCHEMES stands for:

- Space.
- Cash.
- Helpers/People.
- Equipment.
- Materials.
• Expertise.
• Systems.
Name of Initiative: ____________________________

Version: ___________  Date: ___________

Objectives:

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<thead>
<tr>
<th>Key actions to build</th>
<th>By whom?</th>
<th>By when?</th>
<th>Resources required</th>
<th>Review date</th>
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