**Action Plan Template**

*This Action Plan Template will assist you in developing and implementing a formal action plan for any goal you have. Simply fill in the green boxes below and then put your plan into action.*

**Define your goal** – make sure that it meets the SMART criteria; it must be:

Your goal should be clear to everyone involved.

Specific

You should be able to use a specific agreed upon set of metrics to measure whether or not you are making progress towards your goal.

Measurable

No matter how big or small your goal may be, it is vital that your team can actually achieve it.

Achievable

Relevant

The goal should align with your project’s or organization’s values, purpose, and long-term goals.

Time-based

The goal should follow reasonable timeline. This helps create a sense of urgency, provides motivation, and helps to prioritize tasks.

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**Identify the specific tasks and resources that need to achieve the goal** – work with a team of your employees to break down the entire process into a list of tasks to complete. Assign each task a timeframe for completion. Then, review each task and determine what resources you’ll need to complete the task.

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| Specific Tasks that must be completed in order to achieve our end goal | Date task begins | Target completion date | Resources need to accomplish this specific task |
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**Create a visual representation of the entire process and delegate** – organize your tasks into one complete timeline, flow chart, or other type of visual aid. Work with your team to prioritize the tasks and agree to realistic deadlines for each task. Then, determine who is best suited to complete each task, and outline for them the timeframe they should begin working on their task and when they would be expected to complete their work.

[**FLOWCHART TEMPLATE**](https://www.smartsheet.com/workflow-templates)

[**TIMELINE TEMPLATE**](https://templates.office.com/en-us/four-week-project-timeline-tm00000005)

**Create milestones** – Identify and set milestones as a team. Milestones are short-term goals or critical tasks that must be completed at a specific time/date. Milestones act as signposts demonstrating your progress towards your goal, helping to motivate and keep your team on track.

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| Milestone | Date milestone should be completed by in order for goal to be achieved on time. |
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**Monitor, evaluate, and update as needed** – schedule regular meetings with your team to check the plan’s progress, evaluate what is and what is not working, and modify the plan as needed. Create a visual aid to show the team’s progress towards the end goal, such as a gauge chart or thermometer chart. Make sure to include your milestones on your chart.

[**VIDEO: CREATING A THERMOMETER CHART**](https://www.youtube.com/watch?v=s0Jk_VGw2Ng)

[**VIDEO: CREATING A GUAGE CHART**](https://www.youtube.com/watch?v=f6c93-fQlCs)

As you develop your action plan, make sure to get input and feedback from not only the people involved in putting the plan into action, but also those affected by the plan’s outcome. Make sure that you include a wide variety of people in the planning and brain storming parts of the plan. Remember, change is difficult for many people. Involving as many people as you can in the process will ease much of the pain caused by the change you are hoping to implement.