

# 10 Minute ACTION PLANS

By Dr Neil Miller  
CEO TASKey

An action plan is a simple way to develop a list of the actions required to complete a task. It takes into account the situation (including the goal), the stakeholders and the resources required.

Most productive people use some form of an action plan to sort out what they need to do and to guide them when they are doing the work. They appreciate that working without an action plan is taking a risk.

Whilst people generally agree that they need an action plan, they often feel that planning takes too long and it is easier just to get on with the job.

A plan should provide an agreed list of actions with the names of the people who need to complete each action. This makes it easy for each contributor to know the actions they need to add to their ToDo list, so nothing is forgotten.

This article explains how to develop powerful action plans in less than 10 minutes using a simple one page action plan template.

## Table of Contents

10 Minute Action Plans .....	1
TASKey® Me2Team Action Plan Template.....	2
Example 1 - Completed Example of a simple TASKey® Me2Team Action Plan Template.....	3
Example 2 - Completed Example of a Field Repair TASKey® Me2Team Action Plan Template.....	4
Example 3- Completed Example of more detailed TASKey® Me2Team Action Plan Template.....	5
Action Lists from Many TASKey® Me2Team Action Plan Templates.....	6
Online Me2Team Action Plan Template Software .....	6

## 10 Minute Action Plans

Most productive people use some form of action plan to manage their tasks.

A task is usually done more efficiently when a plan is followed.

Over 15 years ago, TASKey developed a simple one page action plan template that has been used by thousands of people in over 175 countries to develop fast powerful plans. This article contains a free copy of the blank action plan template for your personal use (page 2), instructions (below), completed examples (pages 3 to 5), and a brief explanation of how to create bigger plans (page 6).

The goal of the template was to provide a simple means that enables anyone to develop an understandable and workable action plan in less than 10 minutes. The logic was that few people could argue that they didn't have 10 minutes available to develop a plan that will enable them to get their work done in a way that minimizes costs, risks and stress.

It has been our experience that most people can fill in the action plan template in less time than many people take just thinking about a plan. Plus key information that is written down makes it easier to achieve a common understanding of what needs to be done, by who and when.

The template has three main parts:

1. **The vision** that outlines the situation, what success looks like and boundaries/constraints (why)
2. **The actions required** to implement the plan (who, what, when, how)
3. **Stakeholders, responsibly, and resources** (who, with what)

The following is a brief explanation of each part of the template on the next page:

- 1a. **Task Name:** *Short name of the task*
- 1b. **Task Reference:** *If applicable, a reference number that relates to other action plans*
- 1c. **Goal:** *What the plan must achieve (including a completion date if possible).*
- 1d. **Assumptions:** *Any assumptions that if shown to be wrong affect the plan.*
- 1e. **Objectives:** *Deliverables or milestones that show progress towards the goal.*
- 1f. **Task Start & End Dates:** *Dates that show when the task is to be done.*
- 2a. **Actions:** *How the goal will be achieved – the list of actions is a simple workflow.*
- 2b. **Action Dates:** *Usually the date that the action will start (end dates can also be included).*
- 2c. **Action Team:** *The person responsible for the action & the people assisting.*
- 3a. **Person Responsible for the Task:** *Name of the person responsible for task completion.*
- 3b. **Other Stakeholders/People involved:** *People who need to complete actions and/or need to know about the task.*
- 3c. **Resources:** *Resources that need to be acquired for the task.*

This sounds like a lot of information, but it is usually readily available to someone about to initiate a work task. We have found that if some information is not readily available to the planner, simply asking other people involved will fill in most gaps.

The **SECRET TO SUCCESS** – TASKey has found that the fastest and easiest way to complete the action plan template is to first enter the task name and the goal. Then fill in the rest of the boxes in any order. You will find that information in one box will help you identify information for other boxes.

In the examples provided, you will see that only a small amount of relevant information is required for people involved to understand what they need to do. In most cases, action plans are completed in less than 10 minutes. When implementing the plan, progress can be easily shown by marking actions as complete as they are done.

## TASKey® Me2Team Action Plan Template

<b>Task Name</b>		<b>Task Reference</b>	
<b>Goal</b> (What is to be achieved)			
<b>Assumptions</b> (Key Assumptions affecting the Plan)		<b>Objectives</b> (What success looks like)	
<b>Task Start Date</b> (Anticipated/Estimated)		<b>Task End Date</b> (Target/Estimated)	
<b>Actions</b> (What has to be done)		<b>Action Dates</b>	<b>Action Team</b> (by who)
<b>Task Team</b> (People involved)		<b>Resources</b> (To be acquired)	
Responsible:			
Involved:			

**Notes:**

## Example 1 - Completed Example of a simple TASKey® Me2Team Action Plan Template

<b>Task Name</b>		<b>Task Reference</b>	
Demonstration of Work Management Software			
<b>Goal</b> (What is to be achieved)			
To demonstrate the benefits that work management software can provide to us			
<b>Assumptions</b> (Key Assumptions affecting the Plan)		<b>Objectives</b> (What success looks like)	
<ul style="list-style-type: none"> <li>Key people are available</li> <li>Relevant software experts are available</li> <li>Software experts can customize the demonstration so it is relevant to us</li> </ul>		<ul style="list-style-type: none"> <li>Show key people what work management software looks like</li> <li>Work through a relevant example</li> <li>Explain the benefits</li> <li>Highlight the differences between current practices and software solutions</li> </ul>	
<b>Task Start Date</b> (Anticipated/Estimated)		<b>Task End Date</b> (Target/Estimated)	
1 <sup>st</sup> October 2010		5 <sup>th</sup> November 2010	
<b>Actions</b> (What has to be done)		<b>Action Dates</b>	<b>Action Team</b> (by who)
1. Check attendees' experience with work management software		01 Oct 10	Peter Smith
2. Review available work management software with emphasis on relevant case studies		01 Oct 10	Peter Smith, Mary Manager
3. Choose two suitable products		08 Oct 10	Peter Smith, Mary Manager
4. Arrange back to back demonstrations		15 Oct 10	Peter Smith
5. Brief the presenters		22 Oct 10	Margaret Jones
6. Conduct the demonstration		29 Oct 10	Peter Smith + All
7. Seek approval from key personnel		29 Oct 10	Peter Smith
8. Debrief the presenters		05 Nov 10	Margaret Jones
9. Identify any followup actions		05 Nov 10	Peter Smith
<b>Task Team</b> (People involved)		<b>Resources</b> (To be acquired)	
Responsible: Peter Smith		<ul style="list-style-type: none"> <li>Suitable products</li> <li>Conference Room for Demonstration</li> <li>Internet Access for Demonstration</li> <li>Data projector for Demonstration</li> </ul>	
Involved: Mary Manager Margaret Jones David White Other stakeholders			

**Notes:**

Details of relevant software

## Example 2 - Completed Example of a Field Repair TASKey® Me2Team Action Plan Template

<b>Task Name</b>		<b>Task Reference</b>	
Customer Support in the Field			
<b>Goal</b> (What is to be achieved)			
To satisfy the customer's requirements			
<b>Assumptions</b> (Key Assumptions affecting the Plan)		<b>Objectives</b> (What success looks like)	
<ul style="list-style-type: none"> <li>Customer has requested support</li> <li>Customer will be available when visited</li> </ul>		<ul style="list-style-type: none"> <li>Fix the customer's equipment</li> <li>Show the customer how to avoid another service call for the same problem</li> <li>Check if the customer is interested in other products offered by your organization</li> </ul>	
<b>Task Start Date</b> (Anticipated/Estimated)		<b>Task End Date</b> (Target/Estimated)	
1 <sup>st</sup> July 2010		1 <sup>st</sup> July 2010	
<b>Actions</b> (What has to be done)		<b>Action Dates</b>	<b>Action Team</b> (by who)
<ol style="list-style-type: none"> <li>1. Confirm the details of the customer's problem</li> <li>2. Check availability and contact details</li> <li>3. Confirm directions and issues (eg dogs)</li> <li>4. Ensure that likely parts are taken</li> <li>5. Visit customer</li> <li>6. Confirm problem and fix if possible</li> <li>7. Check if customer is interested in other products</li> <li>8. Leave on a positive note</li> <li>9. Travel to next customer</li> </ol>		09:00 09:00 09:00 09:00 11:00  12:00 (Estimated) 13:00 (After lunch)	David Black David Black David Black David Black David Black David Black David Black David Black David Black
<b>Task Team</b> (People involved)		<b>Resources</b> (To be acquired)	
Responsible: David Black  Involved: Customer Parts Team		Anticipated spare parts	

**Notes:**

### Example 3- Completed Example of more detailed TASKey® Me2Team Action Plan Template

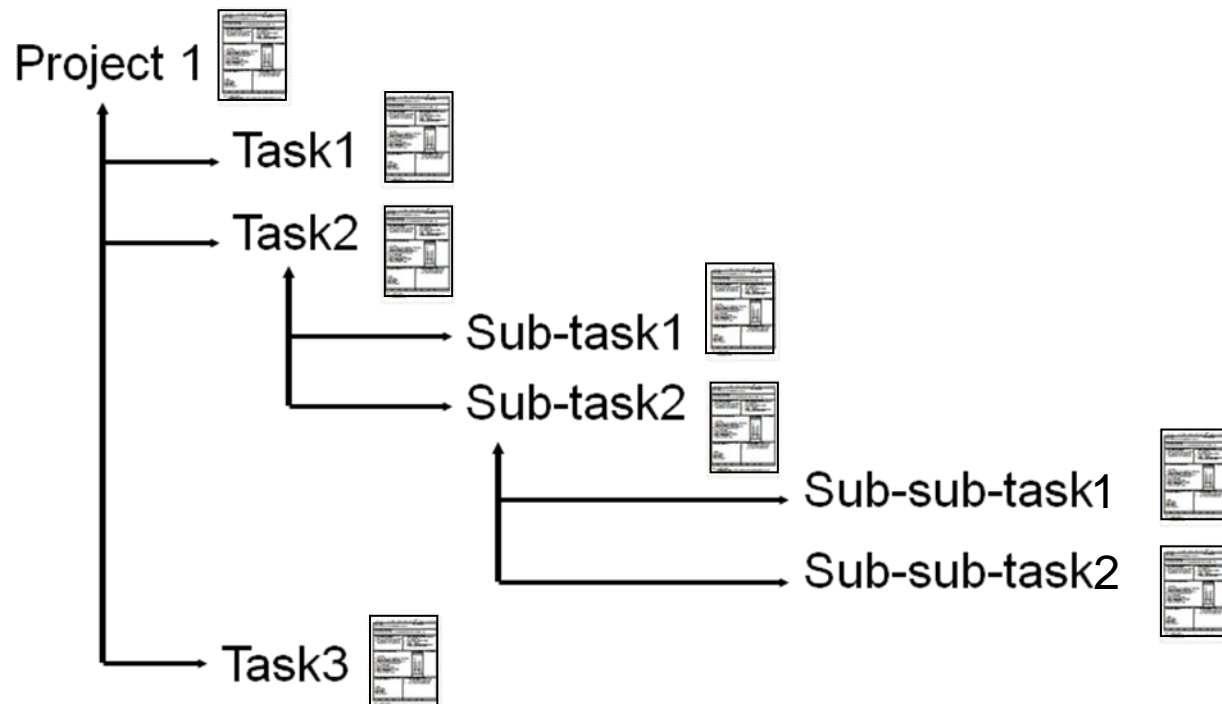
<b>Task Name</b>		<b>Task Reference</b>	
Introduce a New Management Process			
<b>Goal</b> (What is to be achieved)			
To be using the new management process in all relevant activities within 6 months of starting.			
<b>Assumptions</b> (Key Assumptions affecting the Plan)		<b>Objectives</b> (What success looks like)	
<ul style="list-style-type: none"> <li>• Top level management support</li> <li>• Consulting support is available</li> <li>• Task has priority</li> <li>• A Pilot will be conducted in a representative area</li> <li>• Existing processes to be used until cut-over</li> <li>• Relevant training will be conducted</li> <li>• People not needed for the new process will be redeployed</li> </ul>		<ul style="list-style-type: none"> <li>• Stakeholders involved in process design</li> <li>• Pilot completed and lessons learnt incorporated.</li> <li>• Relevant people trained</li> <li>• No legacy processes being used after cut-over</li> </ul>	
<b>Task Start Date</b> (Anticipated/Estimated)		<b>Task End Date</b> (Target/Estimated)	
To be confirmed		Start Date (SD) + 30 weeks	
<b>Actions</b> (What has to be done)		<b>Action Dates</b>	<b>Action Team</b>
1. Review existing management processes		SD	Peter Smith
2. Develop new process outline		SD + 1 wk	Peter Smith + others
3. Forecast resources		SD + 4 wks	Mary Manager
4. Seek stakeholder feedback		SD + 4 wks	Peter Smith + others
5. Agree new management process		SD + 6 wks	Margaret Jones
6. Conduct Pilot		SD + 10 wks	Peter Smith + others
7. Review Pilot and compile lessons learnt		SD + 14 wks	Peter Smith + others
8. Incorporate Pilot lessons learnt		SD + 15 wks	Peter Smith + others
9. Prepare training		SD + 16 wks	David White + others
10. Acquire resources		SD + 17 wks	Mary Manager
11. Conduct training		SD + 20 wks	David White
12. Cut-over to new processes		SD + 23 wks	Peter Smith + others
13. Conduct post implementation review		SD + 30 wks	Peter Smith + others
<b>Task Team</b> (People involved)		<b>Resources</b> (To be acquired)	
Responsible: Peter Smith		<ul style="list-style-type: none"> <li>• Online training materials</li> <li>• Training Rooms with computers</li> <li>• Printing of New Process documentation</li> <li>• Training team</li> </ul>	
Involved: Mary Manager Margaret Jones David White Other stakeholders			

#### Notes:

## Action Lists from Many TASKey® Me2Team Action Plan Templates

Action plans for single tasks are usually easy to develop in under 10 minutes. Teams can also use the one page action plan template to develop a team action plan for a task. This may take a little longer (due to discussions that usually take place), but the overall time required is considerably less than many other methods.

However as the number of tasks increases, they need to be organized. Related action plans can be joined through a work breakdown structure as shown below:



### Notes:

1. Each action plan is a complete action plan template that focuses each team member on their actions.
2. Consolidating the relevant actions from all action plans creates a comprehensive list of actions (ToDo list) for Project1 in this case.

## Online Me2Team Action Plan Template Software

TASKey has developed online software that uses the same layout as the paper based Action Plan Template. With the online action planning software, you can:

- Develop and implement an unlimited number of Action Plans
- Email anyone a pdf copy of an Action Plan or selected Actions
- Use a personalized ToDo list of the actions you need to do for one or many plans
- Receive email notifications about other users' changes that affect you
- Access relevant reports when required

The software uses the list of actions and action team information in task Action Plans to create personalized ToDo lists for every user.

For a **FREE online trial** of TASKey's Me2Team online planning and implementing software, visit [www.me2team.com](http://www.me2team.com). Me2Team makes planning and implementing plans easy for individuals, teams, and small, medium and large organizations.