

ACTION PLANNING WORKSHEET

Many business plans become static documents that collect dust in some executives' drawer. This is because 'more is less'. The secret is to reduce the bulky business planning document into a few focussed action plans, each of which are fully explained in a simple standardised format on a single page. The Action Planning Worksheet is your answer.

Organisation / Area		Plan Period (3-Year Strategic / 1-Year Operational)		
ISSUE		ASSUMPTION		
OBJECTIVE				
Strategies	Action Steps	Action Responsibility	Timetable	
			Begin	Completed
Performance Indicators	Specific Targets	Resource Requirements		

To complete the worksheet easily and completely, ask and answer the following questions.

Why is this an issue? Look for causes not symptoms. If you treat the cause, the symptoms disappear.

What assumptions are we making? Make them explicit as any one of them, if not true, could invalidate your strategy(ies).

What do we want to achieve (objective(s))? Ensure you conform to the rules for an objective.

How will the objective(s) be achieved (strategy(ies))? There are only 8 genuine strategic pathways, viz Fast response (effectiveness), low cost (efficiency), surprise (innovation) and loyalty (strong relationships) or valid combinations.

What sequential action steps are required to deliver the strategy(ies)?

Who will be ultimately be accountable for the results?

When can the results be realistically delivered?

What metrics will be used to measure our progress along the journey (performance indicators) and what are the specific targets?

What resources (people, money, technology, equipment etc.) will be required to deliver the expected results?

Finally, For a detailed step-by-step explanation of how to develop & use this worksheet, buy the Strategic Fit Taking Action Module.