# Running a Strategy Planning Session

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# Planning the session

## Some questions that are useful to answer before commencing the planning

- What is the purpose of the session?
- What are the outputs you need? This could be a physical action plan, or it could be a list of opportunities that individuals will explore.
- Who is invited?
- What will they need to know about the session? What information or knowledge do they need to ensure they can contribute?
- How will you determine whether the session has been a success?
- What will happen after the session to feed back the information built during the session?
- What will happen after the session that builds on the momentum gained?
- What will be required of the participants after the session?
- What assumptions underpin your planning? The most dangerous assumption is that everyone has the same understanding as you do.

## Thinking about the agenda

- What activities are required to achieve the objectives?
- What activities are required to produce the required outputs?
- How will the session be introduced?
- How will the session be concluded and next steps outlined?
- What is the flow of activities?
- Have you built in wiggle room (either extra time or an idea of how to rearrange if the activities take longer or shorter than planned)?

## Choosing the location and time/date

- What activities are you planning? What room space will be needed for these?
- What technology is required? Do you have people joining by Zoom?
- Will people know each other or will name tags be needed.
- What is the location? What is provided and what needs to be bought in?
- What is the most suitable date and time for the session?
- Do participants need a map?
- Do you need to order catering?
- At location – clarify emergency procedures, toilet placement, accessibility issues.

# Preparing your participants

Send a welcoming email that informs people about the purpose and their role. The email generally contains the following:

- Details about the purpose of the event, including what the aim of the session is and what you are hoping to gain from it.
- Ideas about their role as a participant. For example: *We have attached the relevant reports and we hope that you will contribute your ideas for how we can proceed.*
- Details about the location/time/date.
- Details about the agenda or topics for discussion.
- Any supporting information that will inform the discussion and ensure that the participants have all the information they need.
- Consider what questions would be asked by the reader and include that information in the email.
- If food is being served, a comment about dietary restrictions.

# The session

Prior to the session:

- Construct plan or agenda with tentative timeframes.
- Ensure everyone involved has been communicated with.
- Do all the participants know each other or do you need to have name badges etc.?
- Is it such a large group that microphones will be required?
- List all resources required and collate these. Do you need stationery, e.g. sets of pens, post it notes etc.?
- What is the technology setup and is it ready for the session. Never assume that the technology will work. It is a great confidence booster to have practiced beforehand.
- Set up room so that it provides a welcoming environment for participants. How will people be seated, how many tables etc.?
- Have a large poster available to place information that is outside the boundaries of the session but which still needs to be recorded. Parking lot poster.
- Consider the house keeping - are you familiar with the location of the toilets, evacuation procedures, first aid etc.
- Is there any other information that needs to be shared with participants?
- Consider the participants. Do you want them to mix in work groups or do you want to create an atmosphere of where different perspectives can be shared by mixing people up?
- Do you have any strong personalities that can overwhelm others?
- Do you have any really quiet people who can find it difficult to share their ideas?
- What room set up creates the atmosphere that you need? (Remember that a room set up can change over the session.

# Group facilitation techniques

People walk in with different expectations, objectives and ideas. As a participant, they will want to be heard and to contribute. Your role as a facilitator is to ensure that everyone has the same chance. As the facilitator you are responsible for how the participants work together, and you should be neutral and non-evaluating. Your role includes setting a positive tone, keeping the group focused and to the plan, and encouraging participation from everyone.

**Watch**

People may want to contribute but cannot find a space. If you watch the group, you will note hands going up or body language that suggests someone has something to say. Often I will nod to them so that they know I am aware. Then I build the space in: *It looks like there are some people with ideas around this topic... John, shall we hear you first and then Julie, we would like to hear your ideas next.* It is important that you don't forget to go to the people in the order you have suggested. Sometimes a different person will try to share their ideas – ask them to wait, but indicate that they will be next: *It looks like Michelle, you would like to go after Julie.*

**Listen**

People may express dissatisfaction with either the process or the content. As a facilitator, it is helpful to ask for more information. Do they need a space to share their idea, or do they have reservations about a part of it? By finding out what they are feeling, it is brought out into the open – others may be feeling the same way. If they are not, you could place it on the parking lot sheet and return to it after the session.

**Summarise**

At certain points during the session, it is useful to summarise the ideas and thoughts of the group and use that summary to move onwards. Sometimes the group cannot agree and the summary will include that fact. I use the phrase *It sounds like...* as you may have an incorrect sense of where the meeting is at.

# A general plan

The plan tends to include a strong introduction, activity flow, and a strong conclusion that includes momentum building. I have added some ideas below.

**1. Introduction and setting the scene**

- *Today we are going to be focusing on… and the purpose of the session is…*
- *We will work through by…*
- *We are going to… and then we will…*
- *After this, we will… and…*
- *Finally, we will…*
- Ground rules if required
- Housekeeping:
    - Toilets
    - Breaks
    - Emergency procedures
    - Phones

**2. Activities**

Explain each activity clearly and, if possible, have printed instructions as well. These can be on a PowerPoint slide.

It is equally important to debrief after the activity and provide a link to the next actions: *From this activity we have learnt… and our next step is to…*

**3. Conclusion**

This should follow the introduction and reiterate the purpose of the session and what has been produced.

Build on the momentum – a successful planning session can help team members bond and to get really motivated and excited about where the organisation is going. It is important to try to harness this enthusiasm, in order to get others behind your plan, and to help implement it successfully. If participants leave with no clear plans, it can leave them feeling a sense of deflation.

What are the next steps and what do you want participants to do next?

Thank the participants and provide an invitation for more information, as they may have ideas after the session.

# Some useful activities for planning sessions

## What is our core purpose?

In small groups, ask them to consider the purpose of either the unit or programme you are discussing.

This can provide a shared understanding as a basis for further activities and provide a point of reference. This allows discussion around what the purpose was/is.

**Here is a suggestion for an introduction that you may wish to use**

Thinking about … [topic]

I would like you to consider in your group – what is its purpose?

- Who is it designed for?
- What needs does it meet?
- What result does it create and for whom?

In your group:

Using Post-it notes, create a purpose statement that best reflects its purpose in the future. Use one Post-it note for each word.

I am going to ask you to spend 20 minutes on constructing a purpose statement that best reflects your group's ideas.

If the group is larger than seven people, split it into two or more groups, and have them complete the task as a small group and then together as the larger group.

Ask the group or groups to place the statements on the wall and have them create one statement from the many.

Gain agreement on the purpose.

## Where and who are we now? SWOT

This format supports the exploration of the strengths, weaknesses, opportunities and threats around an entity.

This can be constructed in small groups and then collated into one larger SWOT. The advantage of doing it in small groups is that it allows for different thoughts and ideas to be included.

| | |
|---|---|
| Strengths | Weaknesses |
| Opportunities | Threats |

Provide a blank template and ask them to complete one component at a time.

Strengths and weaknesses tend to focus on the internal environment, while opportunities and threats are externally focused. It is useful to quantify statements: *Our customer service survey indicates 84% satisfaction rate*, rather than *Our customer service is great*.

I ask the groups to work through the sections using the following questions as guided reflection. Once the SWOT has been completed, the opportunities can be developed and ideas to mitigate threats explored.

**Strengths**

Strengths describe the positive attributes, tangible and intangible, internal to your organisation.

Think about the **strengths** that your area of responsibility has in terms of resources and core competences. You may wish to consider:

- What physical, financial, and human resources do we have?
- What activities are we particularly good at?
- What competitive advantages do we have?
- What resources and competences do we have that are difficult for competitors to imitate?
- What specialist knowledge do our employees have?
- What do we do that is particularly innovative?
- Are any of the following strengths for us?
    - Our reputation
    - Strength of leadership
    - Employee engagement levels
    - Productivity levels
    - Efficiency of systems and processes

**Weaknesses**

Think about any **weaknesses** such as gaps in resources and competences that your area of responsibility may have, and which may hinder its competitiveness. You may wish to consider:

- What physical, financial, and human resources do we need?
- What additional skills/qualifications do our employees lack?
- What resources or competences do our competitors have that we don't?
- Are any of the following weaknesses for us?
    - Our reputation
    - Strength of leadership
    - Employee engagement levels
    - Productivity levels
    - Efficiency of systems and processes

**Opportunities**

Think about the **opportunities** currently facing your area of responsibility. Environmental factors may be present now, or may become apparent in the future, that may provide opportunities.

You may wish to consider:

- Developments in the market
- Changing industry or lifestyle trends
- External factors that may have an adverse effect on your competitors
- Technological advances
- Demographics
- Changing customer needs
- New product development
- New or niche target markets

**Threats**

Think about the **threats** that might affect your area of responsibility's ability to perform to the best of its ability, and to challenge its competitors successfully going forward. You may wish to consider:

- What changes to the political environment are possible, e.g. a change of government?
- How would economic changes, such as funding changes, impact our area?
- How would social changes, e.g. an ageing population, affect demand for our products or services?
- Are there any technological changes on the horizon, e.g. new computer software that is incompatible with your existing IT systems?
- What are your competitors' intentions and ambitions?
- Are there any threats to your existing key contracts/supplier relationships?
- Are you susceptible to certain types of risk, e.g. fraud, technology failure, intellectual property theft, extreme weather conditions, terrorist attack, etc.?

## Where and who are we now? TOWS

The TOWS matrix is simply SWOT in a different format. It follows directly on from a SWOT analysis by building on the information about the strategic position of the organisation in order to generate options for growth.

The TOWS matrix is used to analyse strategic options by examining an organisation's internal strengths (S) and weaknesses (W) against external opportunities (O) and threats (T). It takes SWOT analysis a step further, providing a structure for generating and analysing potential strategic options.

| **Internal factors** / **External factors** | **Strengths (S)**<br><br>List internal strengths here | **Weaknesses (W)**<br><br>List internal weaknesses here |
|---|---|---|
| **Opportunities (O)**<br><br>List external opportunities here | **Strengths and Opportunities (SO)**<br><br>Generate strategic options here that match strengths with opportunities | **Weaknesses and Opportunities (SO)**<br><br>Generate strategic options here that take advantage of opportunities by avoiding weaknesses |
| **Threats (T)**<br><br>List external threats here | **Strengths and Threats (ST)**<br><br>Generate strategic options here that use strengths to avoid or overcome threats | **Weaknesses and Threats (WT)**<br><br>Generate strategic options here that avoid both weaknesses and threats |

By matching internal strengths and weaknesses with external opportunities and threats, strategies can be formulated that build on strengths, improve upon weaknesses, capitalise on opportunities, and minimise threats.

**What to do**

Using the template**,** create a matrix with strengths and weaknesses along the top row and opportunities and threats in the left column.

Next, list all the strengths, weaknesses, opportunities and threats associated with the organisation (which would have been identified in the analysis stage) in the appropriate boxes. Then brainstorm options for each quadrant (without evaluating) which either:

- Capitalise on opportunities that fit with internal strengths (SO), e.g. targeting new markets
- Use internal strengths to reduce exposure to external threats (ST), e.g. by staying ahead of the competition by developing a wide range of products or services
- Overcome internal weaknesses to pursue opportunities (WO), e.g. by recruiting new employees with the skills the organisation currently lacks
- Defend against external threats (WT, e.g. by training existing employees to develop new products to differentiate the organisation from new competition

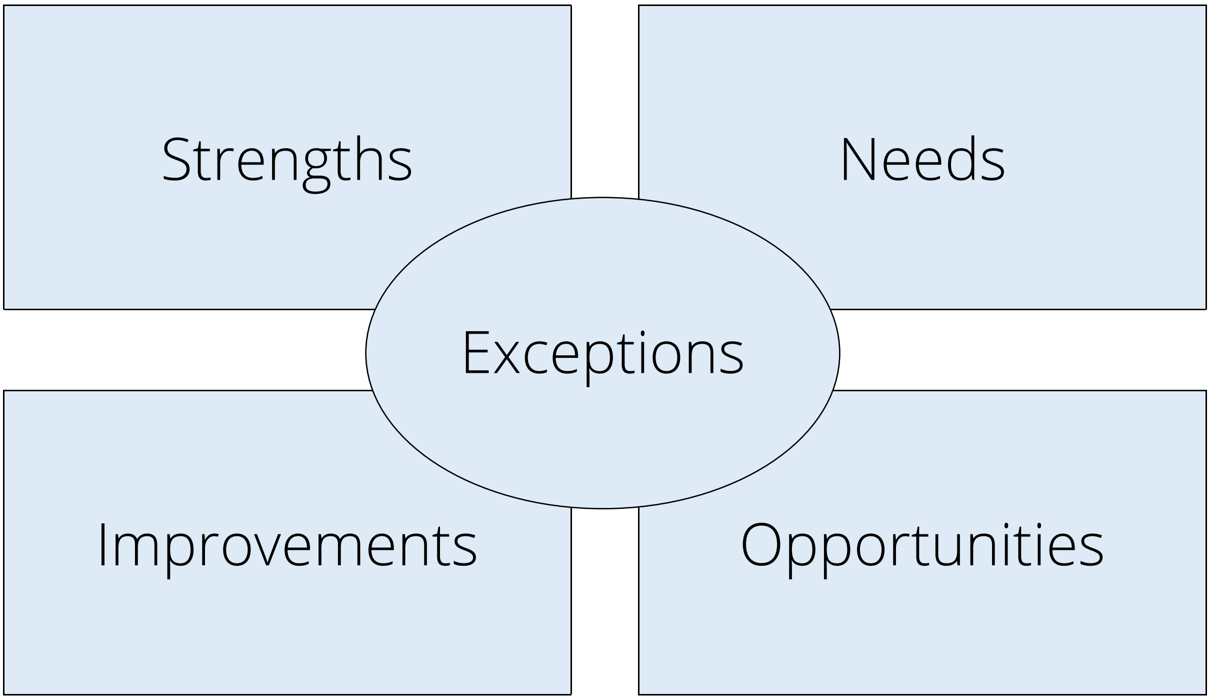
An effective strategic option is one that takes advantage of opportunities, avoids threats (or transforms them into opportunities), builds on internal strengths, and minimises internal weaknesses (or takes steps to eliminate them).

## Where and who are we now? NOISE

*From https://mikecardus.com/noise-alternative-swot*

This tool allows a group to look at what is working and to identify roadblocks, and it can support the exploration of opportunities.

It starts with the strengths and then moves to needs, opportunities, improvements, and finally exceptions. I have found that this format seems to support people to focus and think about the future, rather than concentrating on past strengths. By encouraging people to consider the strengths first and then look at the future, the opportunities and improvements tend to be more future-orientated.




**Some questions to ask**

Start with **strengths**:

- What is good about what you are looking at?
- What are its strengths?
- What is currently working well?

I often get asked about the difference between *strengths* and *exceptions*. It is a matter of perspective – strengths are written before people consider what is needed, what opportunities are available, and what improvements are required. Exceptions are focused on these factors, and so eliminate aspects that people are proud of but may not be so relevant now.

Next are the **needs**, and some questions might be:

- What are the needs of the stakeholders?
- What is the organisational need?
- What are the needs of the customer?
- A good way to look at needs is to complete this sentence: *When it does… it will be fit for purpose.*

Then the **opportunities** available in the future. Questions might include:

- What are others doing?
- What are areas of underutilisation?
- What do you currently do that could be done differently?
- Thinking about the needs you identified, are there any opportunities here that could be developed?

This is the time to not just consider what is feasible, but also to head off into some blue-sky thinking. Some ideas may be discarded later, but can lead to other opportunities being identified.

**Improvements** are looked at in terms of what would be required to achieve what is needed, and you can ask:

- If currently the… operates at X – what would X x 2 look like?
- What would be required to fulfil the needs?
- What would be required in the future?

Finally, the **exceptions** circle. This is different from the strengths and focuses on the needs, opportunities and improvements identified already. You might ask:

Of the N, O and I that you have listed, what is already happening – even a little bit?

After the exceptions have been completed, it is interesting to go back and look at the strengths again, and see what is needed in the future.

## Brainstorming or idea-generation activities

Brainstorming or idea-generation activities are designed to record ideas. They are not designed to analyse or criticise any suggestions, as the aim is just to initially record as many as you can. Sometimes the most off-the-wall idea can generate a more practical one.

Start the session with an objective and allow people time to start thinking before beginning recording the ideas. Provide them with a timeframe.

The ideas can be recorded on sheets of paper or Post-it notes that are placed on a wall.

**Multi-table brainstorming**

This format involves multiple tables being asked the same question or being asked to brainstorm on the same idea.

After a predetermined time, the tables divide and people go to other tables and continue the brainstorming. This process is then conducted two or more times. The benefit of this activity is in building ideas with different groups.

**Choosing the ideas to take forward**

Provide the participants with sticky dots. The pages with the ideas are placed on the wall and participants asked to place their dot on the idea they think should be taken forward.

It is really useful to outline the boundaries of the decision in terms of ease, cost or objective.

You can run the process a couple of times to choose the ideas to be taken forward. Another option is to use different coloured dots for first and second choices.

# Problem solving tools: The 5 whys

This simple, widely used technique is useful for investigating the underlying causes of undesired, single-problem events.

It can help you:

- Review single past events that went badly, or self-contained events that are currently being performed badly
- Trace back reasons for failure/inadequacy etc. to their origins, so that systems or procedures can be changed to ensure that the event is not repeated

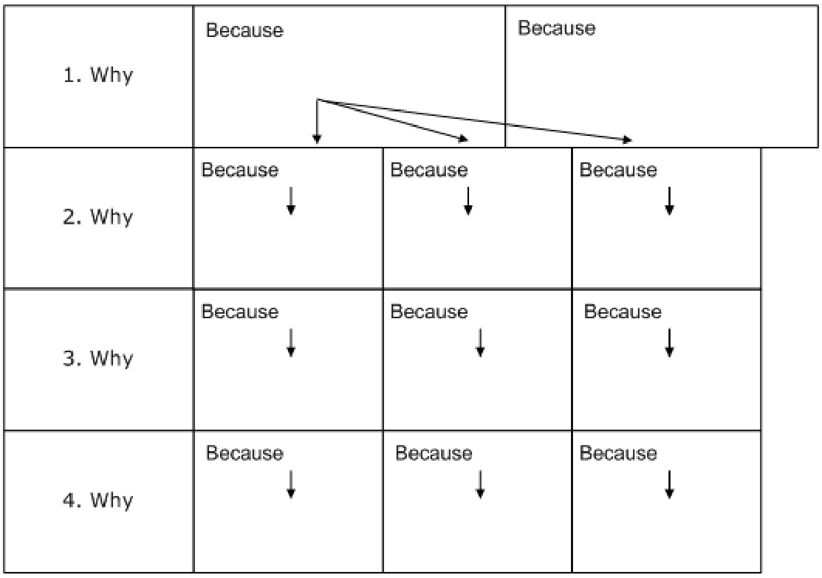
**What to do**

Try to come up with ideas as to why the event occurred. Write these down on a flipchart along the top of the page. If there are more than three, stick a second flipchart page to the wall and write additional ideas on the top of this sheet.

Now draw an arrow down from each of the answers you have recorded and repeat the question for each arrow.

Repeat the process five times. By the end, you should have four arrows leading down in a line from each of the original suggestions.

**To illustrate:** ***Why did X occur?***



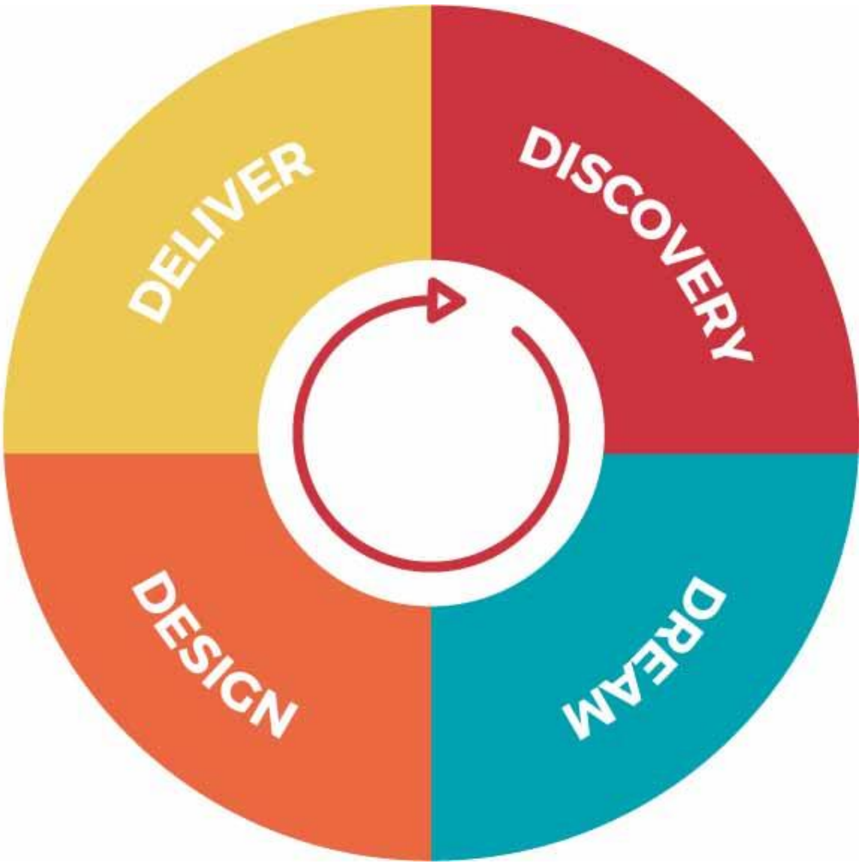

Using the outcomes on the bottom line, you should now have a clear idea about the root cause of the problem. From there, you can create an action plan to decide how you will resolve the issue for the future.

# Planning tools: 4D cycle

Appreciative inquiry (AI) helps us to look at what is good and valuable about a particular situation and, by querying and questioning why this is, to discover new possibilities and improvements.

**Suggested resources:**

- Flipchart
- Marker pens
- Task sheet
- Handout of 4D Appreciative Inquiry Cycle. The cycle has been reproduced below:




Write the problem to be solved on the flipchart. This may be a specific problem that the group wants to address, or it may be a predetermined problem used purely for the purpose of the exercise. For this example, we will use: *Our customer service survey indicates that 52% are dissatisfied with our service*.

Now start to work through the problem using the four phases shown on the 4D cycle diagram. Tackle each phase individually.

First look at the **discover** phase (15 minutes)

Explain to the participants that the discovery phase is all about focusing on times of excellence, when people have felt things to be at their most effective and alive. Talk about how a traditional problem-solving approach to resolving conflict within a team might ask *What is the source of the dissatisfaction?*, whereas the AI approach would ask *Where is it working?*

Ask the group to give you examples of the best customer service they have ever provided.

Note the responses on the flipchart. Once you have enough responses, pin the flipchart to the wall.

Now move on to the **dream** phase (15 minutes)

Talk to the participants about how in the dream phase the challenge is to move away from the status quo, and start to envisage a preferred future. Encourage them to think about potential and the contribution that could be made. In practical terms, what is the ultimate position the team could be in? How far can it stretch?

Ask the group to tell you how their dream customer service survey would look. What comments would people make about the customer service, and what would have happened to them to make them respond that way? Remind them to use the responses from the discovery phase for prompts and ideas. Capture their thoughts on a flipchart.

Pin the sheet on the wall next to the discovery phase responses.

Explain the principle behind the third phase, **design** (15 minutes)

Discuss how this phase involves creating the social and procedural architecture required to realise the dreams. Emphasise that this is the time to determine the desired qualities and behaviours that will underpin the efforts to move towards a positive future. As an example, you could say: *AI would ask, 'What is the best way to lead this team towards our goal?' rather than the more traditional 'What is wrong with the way this team is led?'*

Ask the team to think about what it is they need to do in order to achieve their dream customer service standards. If required, you can prompt with questions such as: *What are the training needs?*, *Will there be procedural changes?*, or *Are the current system capabilities sufficient?*

Again, pin the sheet with all the suggestions on it to the wall.

Talk to the group about the final phase, **deliver** (15 minutes)

Talk to the participants about how this phase provides the opportunity to put into practice the visions and propositions they devised during the dream and design phases. Emphasise that this is a time of continuous learning, adjustment, and improvisation, and that the process is only as valuable as the changes that actually occur after the process has been completed.

Ask the group to tell you what they need to do to implement these dreams. They should consider using the following questions to break down each dream into manageable chunks:

- **What** needs to be done to achieve this?
- **Who** needs to be involved?
- **Where** should it be implemented?
- **When** does it need to be done by, and by whom?

**What to do next**

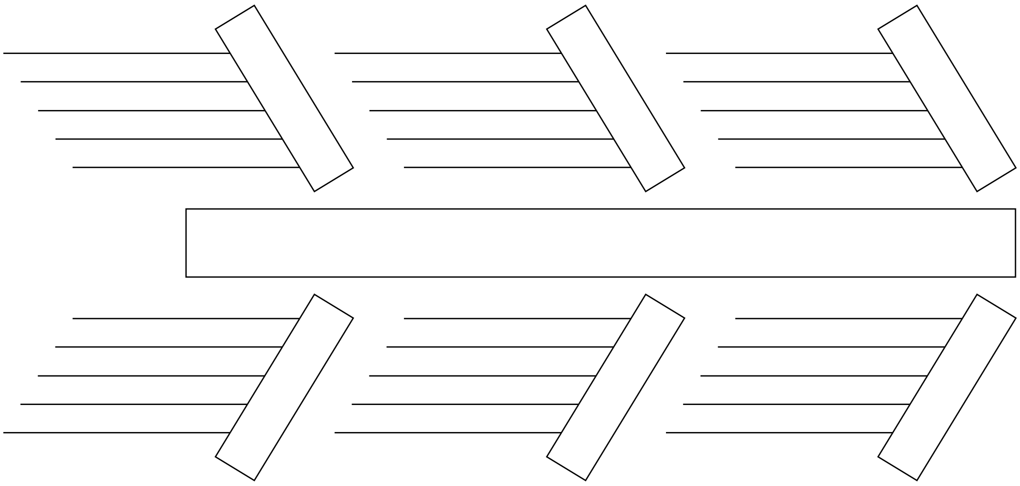
**Review activity and apply learning** (15 Minutes)

Review the flipchart notes from each phase and use them to complete an **action plan.** These actions can then be followed up by the individuals assigned to each task, to ensure the opportunities identified as a result of resolving the problem are implemented.

# Planning tools: Fishbone analysis

Fishbone analysis is a systematic way of analysing a problem or issue. It can help teams to identify the root causes of problems or issues that occur, and find solutions to them.

Fishbone analysis uses the following structure to analyse an issue, and this can be created on a flipchart or whiteboard:



**Steps**

1. Write the problem or issue along the 'backbone'.
2. Causes of problems typically fall into the following main categories: people, processes, technology or systems, materials, and environment. List whichever of these categories are appropriate to your project in the 'bones' of the fish. This will help you to generate and organise your ideas.
3. In the 'sub-bones' that stem from the 'bones', brainstorm ideas to list all the possible factors under each category that may be causing the problem/issue.
4. After completing the diagram, review the information you have collected and prioritise, by consensus, the factors in order of importance/probability. You may find that the most probable causes appear in more than one category.
5. As a group, try to come up with solutions to what you have identified as the main causes of the problem/issue. Look at why each of the factors is happening in order to help you find effective solutions.
6. Using this information, draw up an action plan to resolve the problem/issue, including timescales, priorities, and responsibilities.

# Planning tools: Hexagonal thinking technique

This exercise illustrates a decision-making technique to help bridge the gap between the generalist thinking applied by most decision-makers and the specialist approach of modelling.

Using hexagons as a flexible mapping technique works well for many people. This system helps managers to visually think through problems that involve high levels of complexity and uncertainty. This technique enables a facilitator to tap into the wealth of normally hidden, unshared, and inaccessible knowledge and feelings within a group of employees.

As this can be a relatively complex and time-consuming exercise to facilitate, it is best used as a tool to address a specific business issue.

**Preparation**

Read over this guidance sheet thoroughly in advance. Print out individual hexagons. Prior to the session, the manager and/or the team should identify an area of challenge. This topic or area should be made clear beforehand to all those attending the session, so that they may form some thoughts and opinions in advance.

There is a suggested step-by-step plan for a one-hour session below.

**Suggested resources**

- Blank hexagons
- Flipchart
- Flipchart markers
- Sticking tack
- Paper and pens for all participants

**What to do** (1 hour)

At the beginning, introduce the exercise and explain its purpose.

Then, facilitate an informal discussion to elicit the group's main thoughts about the challenge they are facing. The hardest part of most discussions is trying to determine what the core issues and concerns are. Using a process favouring creative thinking allows and encourages participants to suspend their judgement until a significant number of points has been made.

Try to capture each distinct idea behind the statements that are made during the conversation. Write each point as a summary headline on a hexagon. Each hexagon should then be stuck randomly to a whiteboard, wall, or flipchart. The group members should be able to see them clearly.

Check each point, as it is written up, to ensure it attracts a common understanding within the group. At the same time, take care to avoid any debate or judgements on its validity.

Try to be guided by the following principle: *If someone in a responsible team thinks it, there must be something to it*.

When you feel the discussion has drawn to a close (you may have between 20 and 40 hexagons at this point), invite the participants to look at the hexagons displayed.

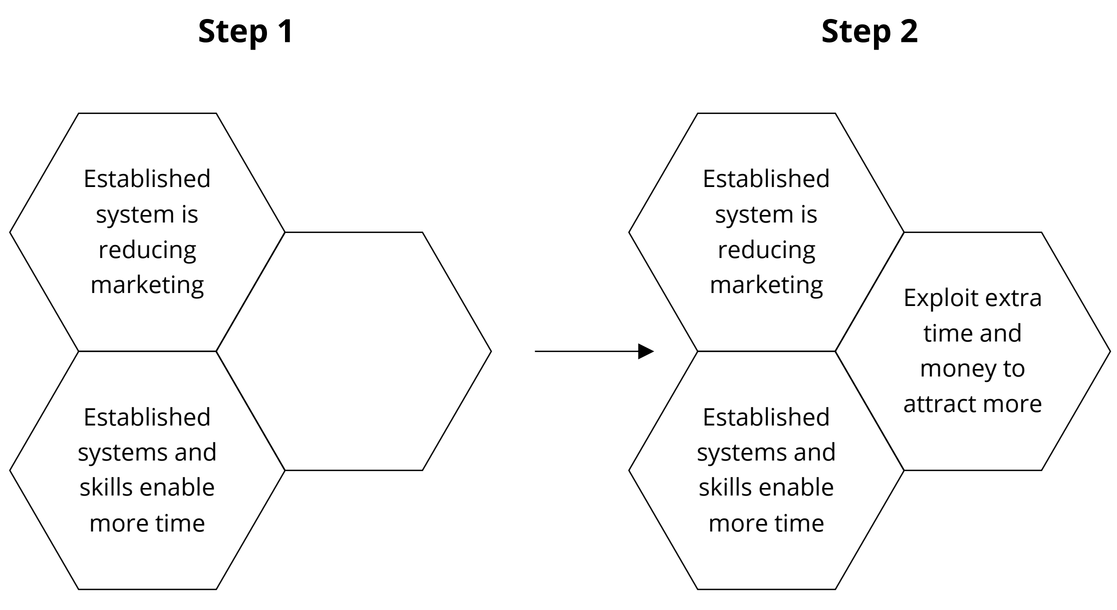
After a few minutes have lapsed, ask the participants to try to bring some order to the ideas displayed before them. The best way to do this is to start grouping the hexagons into clusters. Invite suggestions from the group as to the points that the first cluster should consist of. When suggestions are made, encourage other members to disagree, suggest alternatives, reach agreement, and explain their reasoning.

When all the hexagons have been arranged into clusters, ask the participants to explore and indicate the interconnectedness between them. This is most simply done by using connecting arrows between the clusters.

**Review activity** (40 minutes)

Some of the best ideas come from a process of lateral thinking. In order to stimulate lateral thinking, encourage the participants to use random association to connect hexagons and produce new ideas and/or solutions. The participants should take two separate hexagons and suggest an idea that should be written into a blank third hexagon. You will require more blank hexagons for this part of this exercise, so make sure you have printed and cut out enough.

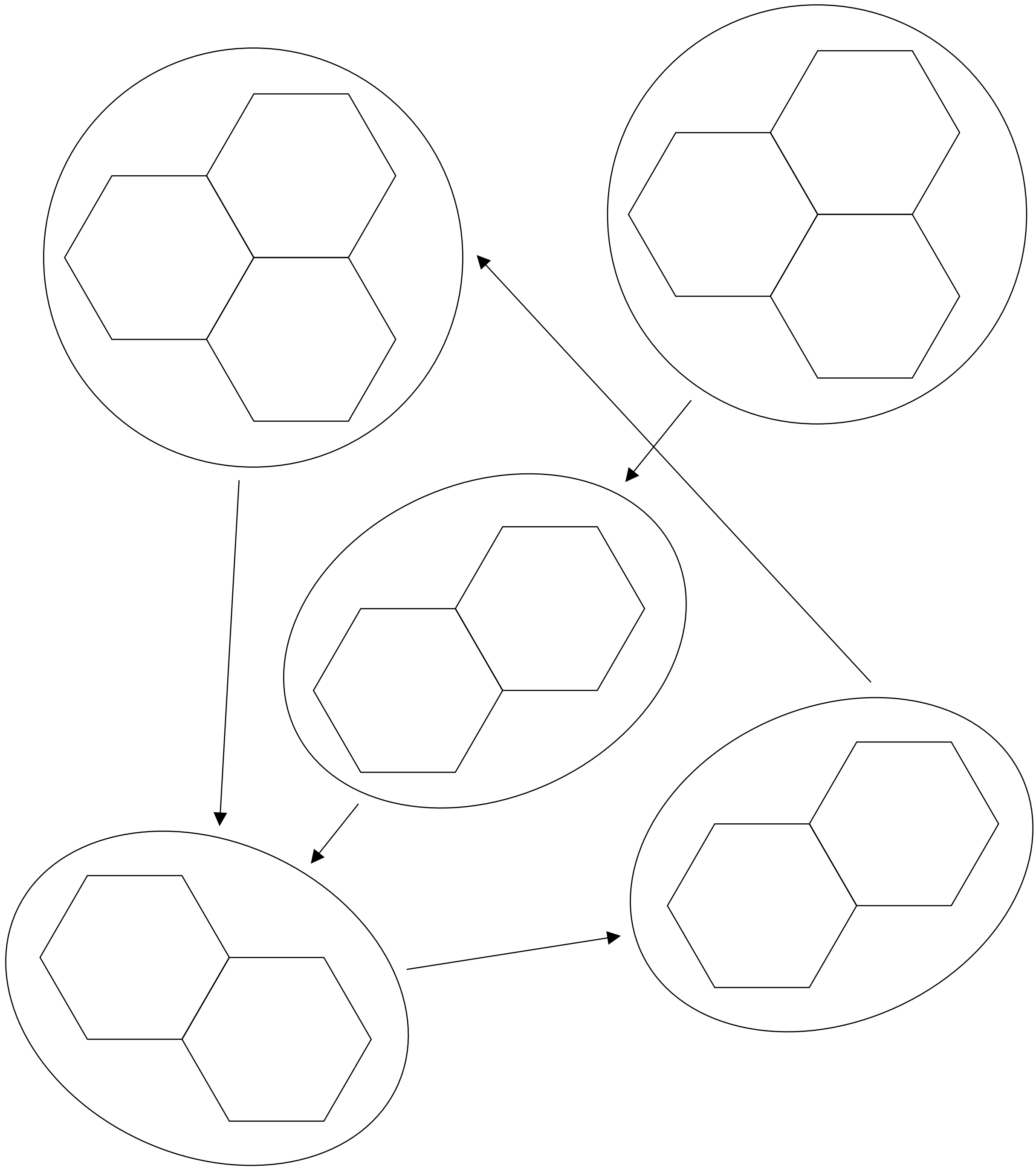
**Example**



**Apply learning** (15 minutes)

Ask the participants to use the ideas and suggestions that have been generated during the lateral thinking session to formulate a group action plan. The action plan should aim to outline the steps that can be taken to address the issue.

**Examples of clustering**



## Evaluating and selecting options

The evaluation and selection of options follows on directly from the generating options stage, and involves testing options to find the best fit for an organisation.

Johnson and Scholes propose three tests for strategic options: suitability, feasibility and acceptability, while Richard Rumelt offers four tests: consonance, consistency, advantage and feasibility. Their approaches are not identical but are very similar, as illustrated below:

| Johnson and Scholes | Rumelt |
|---|---|
| | **1. Consonance:** Does the strategy address the external environment? |
| | |
| | |
| | **4. Advantage:** Does the strategy create/maintain competitive advantage in the selected area of activity? |

These tests will help to clarify the underlying principles behind strategic options and help assess risk, uncertainty, and likelihood of acceptance by stakeholders.

Each of the tests aims to answer these key questions:

**Purpose:** Does this option take the organisation where it needs to go?

**Environment:** Is it compatible with the environmental factors affecting the organisation, and does it fit with the strategic intent of the organisation and expectations of stakeholders?

**Capabilities:** Does the organisation have the resources and capabilities needed for the option to succeed?

## Creating an implementation plan

An implementation plan sets out the actions required for a strategy to become a reality. It will be created once a thorough strategic analysis has been undertaken and strategic options decided upon. Here we outline the steps for creating a strategy implementation plan:

| | |
|---|---|
| **1.** Agree the core strategic aims | • Outline the broad strategic direction and determine a timeframe for achieving this.<br>• Agree the broad set of actions (core strategic aims) that need to be taken to implement the chosen strategy. |
| **2.** Identify key action(s) for each core strategic aim | • Identify the shorter term key actions that need to be taken in order to fulfil the core strategic aims.<br>• Determine the order in which these actions should be taken. A technique such as 'taskboarding' can aid this planning. |
| **3.** Identify measure(s) for each key action | • Identify how you are going to measure the relative success, or degree of completion in carrying out each key action. This can be done by identifying key performance indicators for each key action.<br>• Decide how, when and by whom the information relating to each measure will be collected and reviewed. |
| **4.** Set objective(s) for each key action | • State exactly what is to be achieved and when.<br>• Ensure your objectives are SMART (Specific, Measurable, Achievable, Realistic and Time-bound). |
| **5.** Allocate owners | • Allocate responsibility for each action to an individual. These people will be accountable for the completion of the actions.<br>• Ensure the owners are aware they are not necessarily responsible for carrying out the actions themselves, but are responsible for making sure they are carried out. |

**6.** Allocate resources

- Identify the additional resource requirements for the strategy. These may include:
  - People resources (the number of people needed and their key skills, knowledge and behaviour requirements).
  - Physical resources (real estate, equipment, etc.).
  - Financial resources (capital expenditure, cash required, etc.).
- Consult with a range of people in the organisation to ensure that projections are accurate, assumptions and timescales are realistic, and that nothing has been overlooked.
- Once projections have been made, a resource audit should be carried out to check for sufficiency, adequacy (condition, location, state or quality), and availability (at the time and in the quantities required).

**7.** Communicate the plan

- Finalise and agree the plan with those involved.
- Plan how you can most effectively communicate the plan to all stakeholders.

**8.** Continuously review and update the plan

- Throughout implementation, revisit initial assumptions and make changes as appropriate.
- Monitor actual performance against projections and be prepared to make adjustments to the plan.

# Creating an action plan

This exercise is designed to help you to draw up an action plan to enable your team to complete a task. It will allow you to assess your goals and objectives, work out whether or not they are realistic, and how they may be achieved.

**Task**

Using the blank template, note down your goal or key objective. Before moving on, take a moment to be sure that your goal is **SMART.**

- **S**pecific
- **M**easurable
- **A**chievable
- **R**elevant
- **T**ime-bound

Note down all the steps or tasks that are needed to achieve the goal. Try to write down the steps chronologically, so that each one follows on logically from the last. An example has been shown in the template below.

Beside each step, note down who is responsible for carrying out that step, and when it needs to be completed by.

In the final column, note down an outcome or indicator that will help to signify when that step has been successfully completed. For example, if the step is to inform all customers of a change in operating hours, then completion of a mailing to all customers containing this information would be a good indicator

Review your action plan and ensure that wherever possible:

- The action plan links in to other plans and goals in order to maximise the use of resources
- Those involved in planning are able to achieve the steps in the action plan
- The plan defines each individual's responsibilities
- The plan is agreed upon and supported by all those involved
- The action plan has an agreed timeframe, and is cost-effective
- There are back up plans/contingencies to deal with unexpected events

| **Goal:** | | | | |
|---|---|---|---|---|
| **Step/Task** | **Who** | **Deadline** | **Success indicator** | **Done?** |
| | | | | |

An example of the completed template has been reproduced below:

| **Goal:** To survey stakeholders and ask their needs for the next five years | | | | |
|---|---|---|---|---|
| **Step/Task** | **Who** | **Deadline** | **Success indicator** | **Done?** |
| Focus group meeting arranged for August<br><br>Location arranged<br><br>Catering ordered | Mary | 20 June | Meeting arranged | √ |
| Questions created for focus group | Marty | 1 July | Questions to Mabel | √ |
| Signed off by manager | Mabel | 10 July | Questions signed off and sent to Mary and Mike | |
| Main stakeholder groups identified | Mike | 1 June | List of stakeholders produced | |
| For each group, a representative of group identified and contact details listed | Mike | 1 June | List of contact details produced | |
| Representative contacted and asked to participate in a focus group | Mary | 25 June | List of attendees produced | |
| Focus group held | Mary/ Mike | August | Focus group held | |
| Report produced summarising stakeholder answers | Mary/ Mike | 30 August | Report sent to manager | |

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