

ACTION PLANNING

It is astonishing to learn that only 20% of people's goals are achieved when they do not write them down; however nearly 80% of people's goals are achieved when they use a process such as action planning. Action planning is a valuable tool that will clarify goals and objectives, detail actions necessary for successful accomplishment, create accountability for performance, and designate supports for the effort.

1. Objective:

The action plan begins with recording what it is you wish to achieve.

Example:
Balanced budget

2. Goal:

Next record the specific behavior you want to address along with how you want to address it. It is important to be very specific so that there is no confusion about the intention of the action plan. If you feel it is necessary to complete numerous action plan forms to address the specific goals you have, please do so. The more specific you are, the better your performance will be.

Example:
Learn how to reconcile my bank account with the bank statement.

3. Action:

Next record the specific action that will be taken to modify your behavior to achieve the goal. Again, the more specific you are the better your success will be. It may be necessary to list numerous actions to achieve a single goal. It is perfectly acceptable to have several actions for a single goal as long as there are measurements (*recorded in step five*) for each of the actions.

Example:
1) *Attend bank reconciliation training class.*
2) *Reconcile my bank statement successfully for 3 months.*

4. Target Date:

Next record the date(s) that your performance will be measured. It is crucial to the process that this date be realistic. Do not be overzealous, but do try to make your deadlines as realistic as possible while still holding yourself accountable for immediate and continual action.

Example:

- 1) 3rd Tuesday of the month.
- 2) Next 3 months.

5. Measures:

Next record how your performance will be measured. The measurements must be quantitative and objective in order to be useful. The measurements must also be specific and detailed. Please take the necessary time to develop a strong measurement system.

Example:

- 1) Successfully complete the training class.
- 2) My bank statements are checked and are reconciled correctly.

6. Support:

Next determine who will help you in your effort. Try to involve people that will hold you accountable for your performance and provide you with guidance when needed. The people in your support system do not necessarily have to be good at the objective themselves; they simply need to be able to observe your performance on the goals set forth in your action plan.

It is also necessary in this step to determine what resources you will need in order to achieve the action plan goal. Resources such as finances, equipment, software, cooperation, etc. should be listed in detail.

Example:

My roommate will check my work. I will need a calculator.

7. Status:

The last step in designing the action plan is to record your performance. Using the measurements listed in the action plan, assess your performance on the target dates listed. The results, whether positive or negative, are recorded on the action plan and shared with your supporters.

Example:

- 1) Training complete
- 2) First bank statement reconciled correctly. Waiting for next statement to come in the mail.

Update the action plan often. It may be necessary to modify the action plan to be more realistic, or more difficult, depending on your progress. This is a living document which means it is supposed to be modified according to your needs and desires.

Action Planning Worksheet

<p>Objective What do you want to achieve?</p>	
<p>Goal What specific behavior do you want to address, and how do you want to address it?</p>	
<p>Action What specific action will be taken to modify your behavior to achieve the goal listed above?</p>	
<p>Target Date What date will performance be measured?</p>	
<p>Measures How will performance be measured to reflect specific performance results?</p>	
<p>Support Who will help me in this effort? What resources will I need for this effort?</p>	
<p>Status What is my performance?</p>	