



# Action Planning

Rob Fuller

U.S.-Middle East Partnership Initiative



Democracy • Education • Economy • Women

**Beyster** |  UC San Diego  
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# Why Action Planning?

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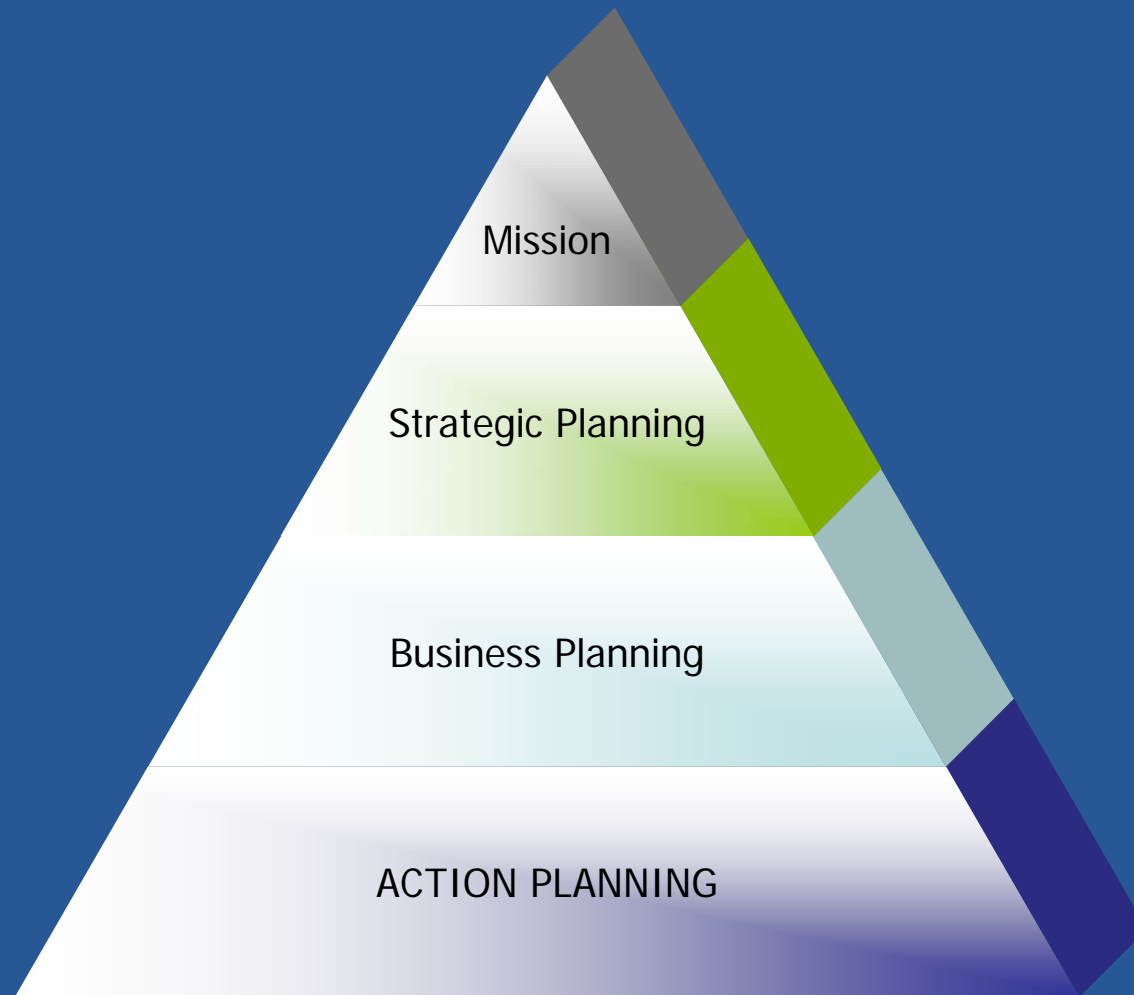


***“Plans are only good intentions unless they immediately degenerate into hard work.”***

*Peter F. Drucker, Management Guru*

# Where does an Action Plan fit?

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# What is an Action Plan?

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- **A Plan To achieve a Goal**
- **An Action Plan**
  - **Identifies Action Steps**
  - **Assigns Deadlines**
  - **Assigns Responsibility**

# What is an Action Plan?

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- **An Action Plan should also:**
  - **Identify Potential Problems & Opportunities**
  - **Include Preventive Action (Facilitative Action)**
  - **Provide Contingent Actions**
  - **Alarms to trigger Contingent Actions**

# Need A Process

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- Don't "reinvent the wheel"
- Experience counts
- Process → Repeatable

# Action Planning Process

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1. **State the End Result Succinctly**
2. **Specify the Action Steps**
3. **Identify Potential Problems/ Opportunities**
4. **Determine Likely Cause(s)**
5. **Develop Preventive/Facilitative Actions**
6. **Design Contingent Actions**
7. **Build in Contingency Alarms**
8. **Implement the Plan**

# State the End Result

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**State as a SMART Goal**



# What is a Goal?

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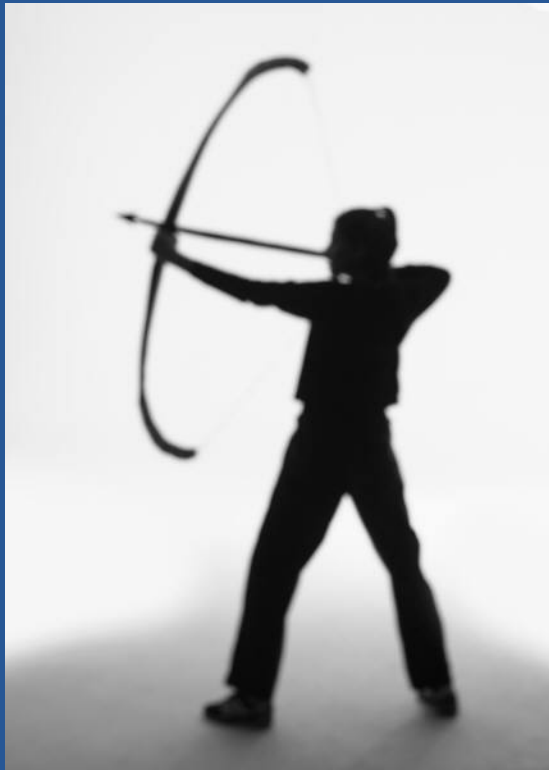


## A Desired End Result Provides Visibility

- What to accomplish
- Where it will occur
- When it will be done

# Goal Setting Guidelines

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## **S M A R T Goal**

- **Specific**
- **Measurable**
- **Action-Oriented**
- **Realistic**
- **Time-Bound**

# What Does a SMART Goal Look Like?



## “Open an office”

- Open a new branch office
- Open a new customer service office
- Open a new customer service office in Marina Mall
- Open a new customer service office in Marina Mall by the end of Dec 2006

# Specify the Action Steps

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- **C→B→A approach**
- **Once you know the goal, ask:**
  - **What has to happen immediately prior for that result to occur?**
  - **How likely is that event or circumstance?**
- **Assign a Deadline**
- **Assign a Responsible Person**

# Identify Potential Problems

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## Ask:

- What could go wrong?
- What has happened in the past?
- What problems can be foreseen?



# Determine Likely Causes

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- **What specific things would be likely to cause this effect?**
- **Experience**
- **Other people's input**

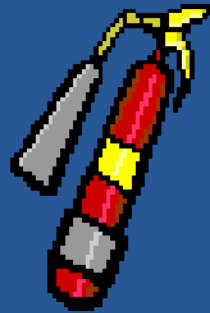
# Design Effective Actions

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- **Effective Actions for Future Problems/Opportunities**
  - **Preventive**
  - **Contingent**
  - **Facilitative**

# Contingent vs. Preventive Action



- **Contingent Action**
  - **First thought**
  - **Most common**
- **Preventive Action**
  - **Prevent cause, prevent problem**



# Build in Contingency Alarms

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- **Know When to take Which action**
  - Occurrence of condition
  - Non-occurrence of condition
  - Triggers a Contingent Action (back up measure)



# Implement the Plan

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- **Follow the Action Steps**
  - **Deadlines**
  - **Quantification**
- **Project Management**
  - **Monitoring**
  - **Actual-to-Plan measurement**

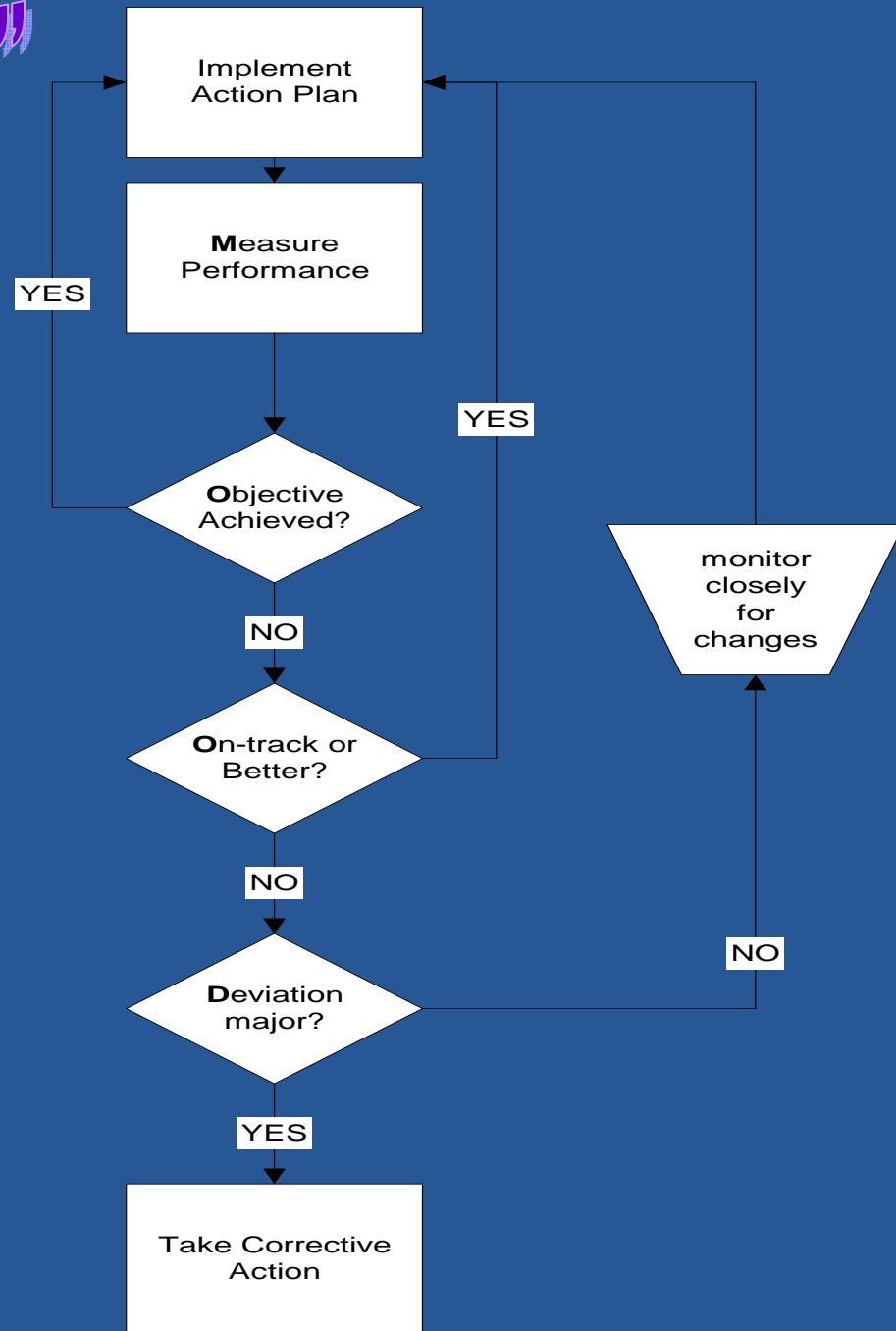
# Are you in the "MOOD" to Implement?

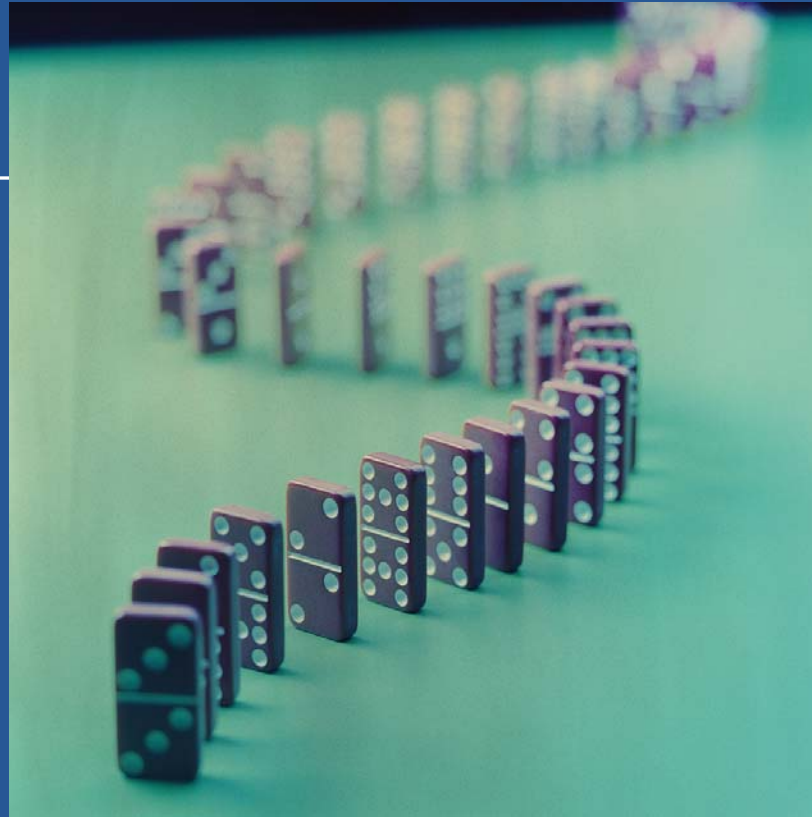
Measure performance

Objective achieved?

On-track or better?

Deviation major?





“Change should be a friend. It should happen by plan, not by accident.”

- *Philip Crosby, Reflections on Quality*