



**Your Name Here**  
**Action Planning Worksheet**

## Introduction

Once you have completed your Success Plan and clearly identified your Strategic Initiatives, you must manage the discussions, ideations, problem resolutions, and steps need to achieve your goals. It is recommended these Action Items are the same you share with your peers and facilitators at your meetings. This worksheet allows you to capture those items in the proper manner and educates on some easy to use tools and approaches to solutions.

## SMART Goals

Watch the linked video here: <https://www.youtube.com/watch?v=1-SvuFIQjK8> The short video addresses making sure each of your Strategic Initiatives are outlined in SMART Goal form.

**Specific** – Plenty of detail, not general

**Measurable** – Must be quantified by numbers, what determines success?

**Actionable** – Whose is going to work on it, why, and how; do we have the resources?

**Relevant** – Is it truly important to the Strategic Initiatives derived from the SWOT Analysis? Effort vs Value, or 80/20 Rule

**Time Bound** – How long until you achieve this goal? Is it manageable and realistic?

*Stay flexible, your goals may be SMART now but may be outweighed by greater priorities down the road.*

## Key Items to Capture in Setting your Action Items

### Headings for an Action Item

Name (Implementer), Department, Date, and Manager are the key components that you can refer back to keep Action Items separate from each other. Also, at the very top of the page should be a good statement of the Goal you are trying to achieve.

### Goals and Sub-Goals – Steps to Achieve

This is where you can get into the details of the goal or initiative.

### Obstacles – Costs

This helps with priority establishment and focuses on the “Relevance” of the initiative. Is it the highest and best use of the project team’s time?

### Deadline

This is the Time-Bound element of the goal or initiative. If a project, there may be sub-deadlines.

### Person Accountable

To be actionable – it must be assigned. Sub-tasks may be assigned to different people.



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### Expected Results

This can be the Action Item written fully as a SMART goal or can be focused on the benefits that will come from implementing this Action Item or Sub-Task.

### Monitoring, Managing for Success

Consider a bi-weekly meeting or email status check to share the small successes, obstacles, or changes related to getting this item completed. If you feel progress is stalling out – call for a very specific meeting to address open issues. Report results at each Peer Group meeting. Give honest and useful feedback to your team members and reward them for success.

## Business Analysis Group Action Items

Name:

Date:

Business:

Facilitator: \_\_\_\_\_

#	Goal	Steps to Achieve	Obstacles/ Costs	Deadline	Person Account-able	Expected Results