

# Action Plans

Whether it's sending out an email newsletter, putting together a presentation for senior managers, or working on a special request for a client, many of us have to complete simple projects as part of our day-to-day responsibilities.

These small- to medium-sized projects may, at first glance, not seem to need much thought. But, occasionally, we can overlook a key step or "to do" item that can derail all our efforts.

For instance, how do you make sure that you've covered everything? Are there any actions that need to be taken early on in the project for it to succeed? And are you clear about when you need to do key tasks, in what sequence, to meet your deadline?

Find out more in this article, video and infographic.

Action Plans are simple lists of all of the tasks that you need to finish to meet an objective. They differ from [to-do lists](#) in that they focus on the achievement of a single goal.

Action Plans are useful, because they give you a framework for thinking about how you'll complete a project efficiently. They help you finish activities in a sensible order, and they help you ensure that you don't miss any key steps. Also, because you can see each task laid out, you can quickly decide which tasks you'll delegate or outsource, and which tasks you may be able to ignore.

## Using Action Plans

Use an Action Plan whenever you need to plan a small project.

To draw one up, simply list the tasks that you need to carry out to achieve your objective, in the order that you need to complete them. (This is very simple, but it is still very useful!)

Use the three-step process below to help you:

### Step 1: Identify Tasks

Start by [brainstorming](#) all of the tasks that you need to complete to accomplish your objective.

It's helpful to start this process at the very beginning. What's the very first action you'll need to take? Once that task is complete, what comes next? Are there any steps that should be [prioritized](#) to meet specific deadlines, or because of limits on other people's availability?

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## Step 2: Analyze and Delegate Tasks

Now that you can see the entire project from beginning to end, look at each task in greater detail.

Are there any steps that you could drop, but still meet your objective? Which tasks could you [delegate](#) to someone else on your team, or could be dealt with by a freelancer? Are there any deadlines for specific steps? Do you need to arrange additional resources?

## Step 3: Double-Check With SCHEMES

Use the SCHEMES\* mnemonic to check that your plan is comprehensive. SCHEMES stands for:

- **S**pace.
- **C**ash.
- **H**elpers/People.
- **E**quipment.
- **M**aterials.
- **E**xpertise.
- **S**ystems.

You may not need to think about all of these to complete your project. For instance, for a small internal project to streamline the format of your team's reports, you might only need to think about "Helpers/People," "Expertise," and "Systems."

### Note:

Once you've completed your plan, keep it by you as you carry out the work, and update it with additional activities if required.

## Learning From Your Action Plan

If you think you'll be trying to achieve a similar goal again, revise your plan after the work is complete, by making a note of anything that you could have done better.

For instance, perhaps you could have avoided a last-minute panic if you'd alerted a supplier in advance about the size of order you'd be placing. Or maybe you didn't allow enough time to do certain tasks.

## Managing Bigger Projects

Action Plans are useful for small projects, where deadlines are not particularly important or strenuous, and where you don't need to co-ordinate other people. As your projects grow, however, you'll need to develop more formal project management skills, particularly if you're responsible for scheduling other people's time, or need to complete projects to tight deadlines.

### Tip:

To develop your project-management skills, see our article on [Gantt Charts](#), and take our [How Good are Your Project Management Skills?](#) test. Our Skillbook [Planning Small Projects](#) also teaches some useful project-planning techniques.

You can also use Action Plans in conjunction with [to-do lists](#), or [Action Programs](#). Action Programs are "heavy duty" versions of to-do lists, which help you manage many simultaneous small projects. This is something that managers at all levels need to do routinely.

### Key Points

An Action Plan is a list of tasks that you need to do to complete a simple project or objective.

To draw one up, simply list the tasks that you need to complete to deliver your project or objective, in the order that you need to complete them.

To do this, first brainstorm every step you'll need to take to follow your task to completion. Then, analyze tasks to see if there are any that can be pruned, or delegated. Lastly, use the SCHEMES mnemonic to double check that you've considered all critical areas.

If you need to schedule people's time, or meet tight deadlines as part of your project, consider using the other project-management techniques mentioned.

# Infographic

See Action Plans represented in an [infographic](#).



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\* Originator unknown. Please contact [customer.helpdesk@mindtools.com](mailto:customer.helpdesk@mindtools.com) if you know who the originator is.