The Big Picture

The Action Planning Workshop					
Introduction Whole Group	**Developing Specific Action Plans** Teams Use the Action Planning Workbook			**Consensus Plenary** Whole Group	
Preparing for Action Planning	**Determining the Measurable Accomplishment**	**Deciding on the Specific Actions**	**Creating the Action Timeline**	**Coordinating the Groups Plans**	**Launching the Action Phase**

Name	**Ready . . . . Set . . . . Plan . . . .**
Overview	This design pattern will prepare people to engage in the action planning process. It involves: ▪ Welcome and Introductions ▪ Setting the Strategic Context ▪ Introducing Action Planning There are 2 ways to use this workshop. For groups working on a single strategy, most of this workshop is done as a whole group. If the group decides on multiple measurable accomplishments, they will divide into working teams to develop specific actions and creation of the action timeline. For groups working on multiple strategies, most of this workshop will be done in working teams.
Metaphor	Rallying the Troops
Graphic	Project Purpose → Strategic Environment → Measurable Accomplishments → Key Actions → Action Timeline → Coordinated Plans
Level of thinking	In terms of the whole Action Planning workshop, this is very much at the Objective Level.
Pattern of Collaboration	This is focused on clarifying at the most basic level. It is providing the strategic and practical contexts necessary for the group to engage in the workshop.
Role	It sets the stage for the remainder of the workshop by placing in a compelling, strategic contextual framework. It provides a "road map" for the workshop; so participants will know where the thinking process is leading and what is expected of them.
Best uses	Preparing a group for practical implementation planning. This is a basic Design Pattern for setting the context for collaborative group work. Any context for work of this nature would be similar in structure and unique in its content

Do not use	For any other purpose.
Group size	6 – 40+
Space needs .	For the whole workshop A room with a flat, blank wall that has at least 8 feet of horizontal space for the action timeline. For this design pattern, the group will need a space where they can all see the front of the room and each other. Groups working on multiple strategies will need working space so their voices do not interrupt the work of other groups.
Timeframe	30 min.

Objectives

Rational Aim	Provide the group with the contextual background to engage in the Action Planning workshop.
Experiential Aim	Enable the group to see the importance of their work and get a feel for what will happen, so they are ready to engage.
Product Result	This design pattern will result in a group that is ready to engage in the task of creating action plans to implement their strategy or project.

Script

Introduction to Action Planning

Welcome and Introductions

Welcome
- Welcome the group to the meeting.
- In one or two sentences, describe what this meeting is about.

Introductions
- Do any necessary special introductions – i.e. guests and special resource people
- Ask the group to, one at a time, say their name and one very concrete, practical thing they really hope to see accomplished by this initiative.
- Are there any others? What are your hopes?
- What comments stood out for you?
- How would you describe our hopes for this project?

Setting the Strategic Context
Quickly review the contextual framework for this initiative. Describe how the group reached this point.

This may be done as a presentation, especially if there is information that the participants do not have. However, doing it as a conversation will engage the participants immediately. A conversation will help the group establish ownership, responsibility and commitment. It need not be long in either case.

The Organization

- What are the key points about the organization, its history, clientele and the overall socio-economic environment that have brought the group to this point?

  Project Purpose
- What are the overall purpose and major objectives of this initiative?
- What do we intend to achieve by doing this project?
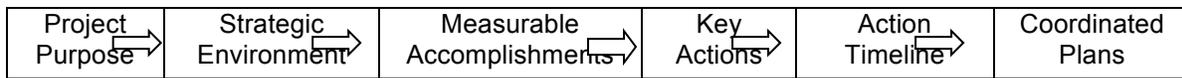
  Strategic Considerations
- What are the key points in the strategic thinking that has into the project?

  Project Plans
- What actual plans have been established for this project?

Introducing Action Planning

- Quickly describe the steps in the workshop. A simple graphic or list of steps is helpful. i.e.

Project Purpose	Strategic Environment	Measurable Accomplishments	Key Actions	Action Timeline	Coordinated Plans

- Decide and clarify the time frame for this action plan. This should be thought through in advance of the workshop.

  Expected Results
- Describe the results expected from this workshop. i.e. "We will determine the measurable accomplishments are decide on actions to achieve them. We will schedule our actions on a timeline."

Explaining the Process
- Introduce the Action Planning workbook
- Briefly walk through the steps in the process. Do it page by page. Show the group where to find the detailed instructions, but do not go into them at this point.

  Preparing for the Team Work
- Write the name of the initiative, project or strategy in #1 on page 1 of the Action Planning workbook. Have each participant do this on their personal worksheet.
- Write the completion date in #2 on page 1 of the Action Planning Manual. Have each participant do this on their personal worksheet.
- Divide action timeline in #14 on page 3 of the Action Planning Manual in into specific time blocks and label them with dates. Have each participant do this on their personal worksheet. A projected image or a flip chart page will help show people how to do this.

  For groups working on multiple strategies
- Divide the group into working teams focused on each strategy. Assignments are often based on the roles people play within the organization or by department. Their specific experience and expertise is a key factor at this point. It is obviously best to assign people to develop action plans for strategies they will implement.

Groundrules	Ensure that each participant speaks at least once during this part of the workshop.

Using this design pattern in a face to face environment

Materials	Flip Chart and markers
Preparation	Establish the overall timeframe for the action plan before the workshop. It will be a phase of the overall project. Prepare contextual flip chart pages before the workshop itself. Prepare flip chart pages for specific instructions and conversations that do not appear in the manual itself.
Challenges	Doing the context as a conversation may present time challenges, because people may feel that the contextual conversation is the workshop itself. Indicate to the group that it is to be brief and to "hit the highlights" before we actually begin the work of action planning. Do not go deeply into the actual steps of the workshop. Taking the group through quickly the manual will allow them to see the steps. Too much detail will promote confusion. The steps in the manual will be very easy for the group to follow.
Tips	All of this should move very quickly. It is not necessary to spend a great deal of time in the context.
Modifications	Setting the Strategic Context may be done as a presentation. The 2 major reasons for a presentation are if it is felt that it is important to have it established by a designated senior leader or if there is substantial information the participants do not have. It is still helpful for this person to ask the group for additional considerations.

Using this design pattern in a virtual environment

Virtual Tools	
Modifications	
Preparation	
Challenges	
Tips	
Example	