

ACTION PLANNING

ACTION PLANNING & CHECKLIST

You have a vision for your efforts and you want to see it realized. To be successful, you need sound strategy and a good plan that keeps the many moving parts on the same focused track. Here are steps you can take to assure that you have a good start - and if you are already up and running, it helps to confirm your plans moving forward!

1. Plan to have a Written Plan

Whether you have large, long-term goals or immediate needs, you should have a well-defined plan IN WRITING to help everyone stay on the same page.

2. Define Your Team

Who's involved?

- What are each group or person's specialties?
- What's the background of the people involved?

What's your common Vision?

Who does what?

- How can each partner apply his/her specialty?
- What are the roles that you will each play?

Practical matters

- How do decisions get made?
- What are the absolute resources available?
Budget details
- How do you plan to share information about contact relationships?

3. Establish Your Goals

What are you trying to accomplish? Write down the goals and chart your progress! Group together goals that relate to target audiences.

Short/Medium Term Measures of Success – specific goals

Long Term Outcome – larger goals and intangible results

General Timeline

4. Create Your Action Plan

Key elements of a good Action Plan:

Strategy – what's the best approach to reaching your goals

What's the timeframe?

What Activities do you plan to use to reach the goal?

What are the concrete Actions & Results you want to see happen?

How do you plan to communicate about this?



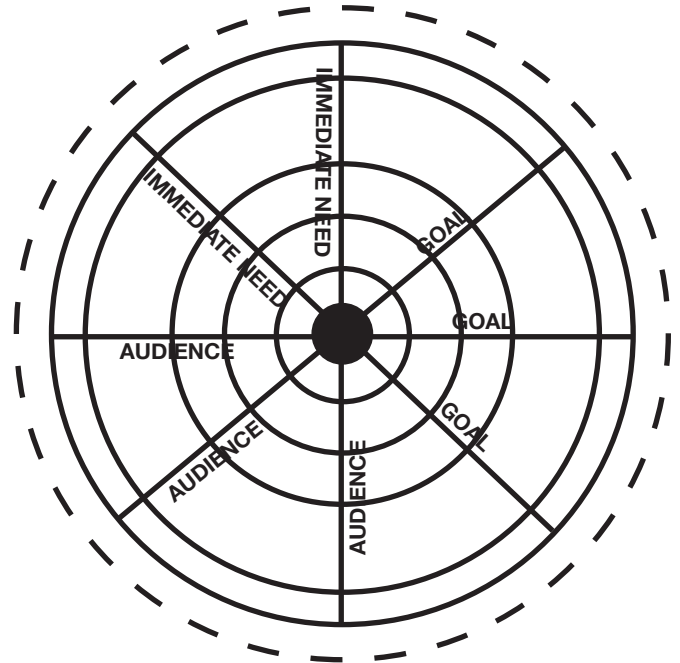
POWER MAPPING

Relationships are the life-blood of any effective effort. How those relationships overlap can be a critical factor of your success. Power Mapping helps you identify the people who can help you achieve your goals – and connects them to your efforts. Many individual leaders are good at making and maintaining powerful relationships, but few efforts utilize the interconnected nature of them for even more effective and meaningful encounters. A Power Map can be the basis of database – but its real purpose is to assure that important people are being reached in a strategy that fits with immediate needs and long-term goals.

POWER MAPPING CHECKLIST

Map based on the goals, key audiences and immediate needs

- ___ Start with the top 5 people who are already connected to your efforts
- ___ Identify the top 5 people who are critical and SHOULD be connected to your efforts
- ___ Grow the list after you have reached the first level
- ___ Make a Power Map to Manage Information and Action
 - Point Person
 - Organization
 - Contact Info
 - What's the best way to reach them?
 - What is their pet issue?
 - Where are they on spectrum of support?
 - What is their specific power and/or expertise?
 - Who's the best person to contact them from your team?
 - What **specific** thing will you ask of them now?
 - Who else are they connected to on this or other lists?
 - Notes, Logs & Action Steps



Power Mapping Tips

- ___ Decide if the Power Map will be jointly managed or managed by one person.
- ___ Engage with the Power Map regularly to move people closer to the center of engagement.
- ___ Use a tool to manage it
 - Most basic – Spreadsheet
 - Use your existing relationship management tools
 - Free online databases
 - Fee-based online databases
 - WebEx
 - Salesforce

