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| CLIENT | WORKPLACE ENVIRONMENT | DAILY SYNTHESIS SHEET |
| PROVIDER & COLLEAGUES | HEALTH SYSTEM | GLOBAL SYNTHESIS SHEET |



Action Plan

TIME

150

minutes

DIFFICULTY

Participants:
EASY

Facilitator:
MEDIUM

Facilitator will have to facilitate the conversation and continuously ask follow-up questions to ensure the team thinks about the specificities that the solution implementation will require.

GOAL

The Action Plan Tool is a strategic template that will help the CIT plan for implementing the final solutions from the brainstorming process. The CIT will create an action plan for each proposed solution. The tool helps the CIT to describe their solution, who it is for, what resources and activities will be required, and how success will be monitored.

HOW DOES IT WORK?

The CIT will create an action plan for **each solution** in the Horizon 1 column of the ideation worksheet. This tool is divided into four sections:

- Description of the solution
- Audience for the solution
- Key activities and resources needed to implement the solution
- Indicators to measure success

MATERIALS NEEDED

- The instructions booklet
- Printed action plan templates (one per solution)
- Ideation worksheet
- Pens

PARTICIPANTS & ROLES

- Number of Participants:** Between three to five if conducted as a large group; up to fifteen if participants are broken into small groups
- Roles:**
 - Select members of the CIT, and the facility in-charge
 - One facilitator
 - One notetaker



Action Plan

Check the influencing factor categories that this action plan applies to:

CLIENT

PROVIDER AND COLLEAGUES

HEALTH SYSTEM

COMMUNITY

WORKPLACE ENVIRONMENT

1 YOUR IDEA

Please describe your proposed solution for this behavioral challenge and how will it work. Provide lots of detail.

2 AUDIENCE

Who are the people and/or groups you are designing for?

3 KEY ACTIVITIES & RESOURCES

What key activities does your idea require to be implemented?
What key resources do your activities require to be implemented?

KEY ACTIVITIES

KEY RESOURCES

(e.g., money, people, time, etc)

4 INDICATORS OF SUCCESS

What will indicate that your idea successfully tackled the behavioral challenge?
What do you need to observe to see if your idea is successful or not?
Make your indicators SMART (*Specific, Measurable, Attainable, Relevant, and Time-bound*)