

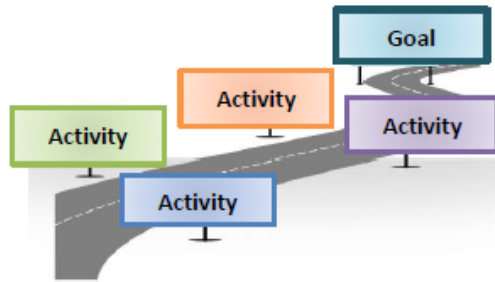
Action Planning Tool

Guidelines

Action Item (What will happen)	By Whom (Team Members/Roles)	Target Date	Status	Outcomes (Results/Barriers)
For example: Review current process for patient education on UMWS	Jen Condel/ QI Specialist	March 30, 2025	In Progress	Scheduled to observe on Wed., Mar. 21 st at 7am

What do you plan to do (roadmap)?

Each line is a specified activity



Designate a team member and their role for each activity

Determine a due date for each activity

Track progress toward the due date for each activity



Indicate the findings for each activity

Clearly identify any barriers to achieving the designated activity

Remember to use SMART Goals

- Specific
- Measurable
- Attainable/Actionable
- Realistic
- Time bound

Keys to action planning:

- Defined communication channels
- Establish expectations