

BIG SUCCESS STARTS WITH A PLAN: CREATING YOUR OWN ACTION PLAN



Big Success Starts with a Plan: Creating Your Own Action Plan | Handout



Why you need to develop a plan

1. It will help you secure funding for implementation
 - o Most grants require a plan
 - o The plan is how you build support
2. The plan will get all of your partnering organizations on the same page, pulling in the same direction

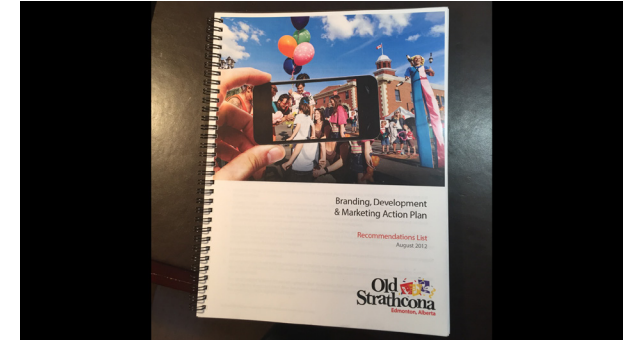
An example: Marion, Iowa

- Their plan has people involved including local schools, City of Marion, Economic Development, Chamber of Commerce, Uptown Marion, Blue Zone program, Local business, non-profits
- With the plan, you get everyone working together

3. You will see increased success with an often-reviewed working plan

- You will review it regularly
- Bottom line is to increase cash into your community
- The plan gives you a specific road map to accomplish that

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4. It helps keep your efforts focused

- You must narrow your focus and a plan helps you maintain that focus

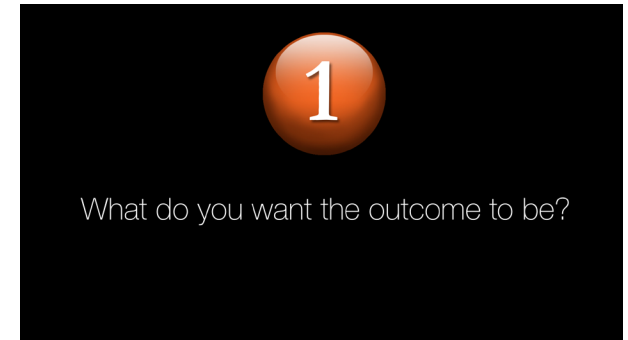
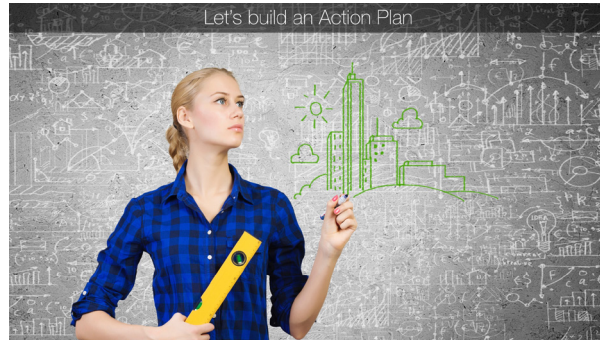
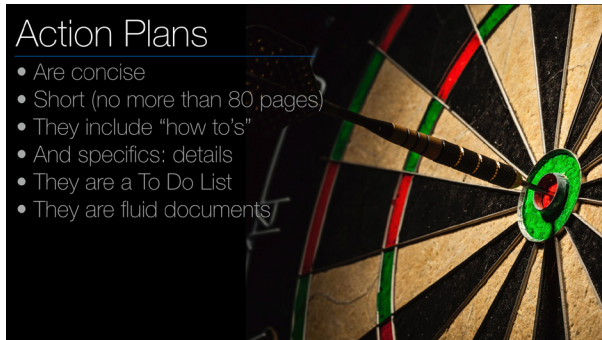
Why does it need to be an Action Plan?

- Strategic plans are dead.
- Here's why
 - We have much shorter attention spans
 - We're doing more with less time, and less budget
 - You have boards that are all assisting you "on the side"
 - We are living in a "right now" – "cut to the chase" world
 - When it the last time you read past the Executive Summary?

Action Plan Vs. Strategic Plan

- Strategic plans:
- General in nature
- Lack specifics and details
- Strategies, goals and objectives tend to be no more than three pages
- Tend to be boring
- Take too long to read
- How many plans do you have sitting on the shelf, gathering dust?

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Action Plans

- Concise
- Short (no more than 80 pages)
- They include "how to's"
- And specifics: details
- They are a To Do list
- They are fluid documents
- The more specific it is, the stronger your success will be

Let's build an action plan

1. What do you want the outcome to be?

- What to do: list three to five outcomes and be specific



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What kind of plan will this be?

3

Developing the table of contents

Example: Friday Harbor, Washington

- Their objectives
 - Living-wage jobs year round
 - Environmental stewardship, lifestyle
 - Focus on quality, art, history, shops & restaurants
 - Promote the inspirational lifestyle
 - Become a year round overnight destination

2. What kind of plan do you want this to be?

- Branding: what we want to be known for
- Development: what we have to do to “own” it
- Marketing: how to tell the world
- Action plan: the to do list

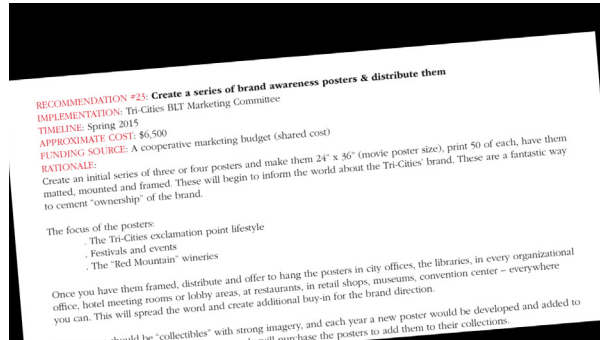
3. Developing the table of contents

- How this plan works (1 page)
- Why (the list of specific goals – 1 page)
- Ten things to remember about branding (1 page)
- Imagine... (selling it – 3 pages)
- Key marketing messages, sample “look and feel” (2 pages)
- The recommendations list
 - 30 or so (no more than 50)
 - Two per page is about right
 - Include photos and examples – it breaks it up
 - About 20 to 40 pages including examples and art
- Supporting documentation
 - No fluff! No research. No filler
 - Sample zoning ordinances, street vendor rules...
 - No more than 20 pages!

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The recommendations list



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Supporting documentation

The recommendations list

- Title (one line description)
- When it would be implemented (starting date and timeline)
- Who takes the lead (it takes a village to win)
- Approximate cost
- Suggested funding source (specific if possible)
- Rationale and details
 - Specifics. Specifics. Specifics.
 - How to get it done
 - If a lot of details, put those in the Supporting Docs section

What to do: put the recommendations in chronological order of implementation

- What to do: Don't go out more than two years (three max)

Supporting documentation

- What to do: include the To Do list in checklist format by organization (include dates)
- What to do: include the total list (checklist format) by month or date
- What to do: And by category, marketing, product development, public outreach...

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Revisit the plan every other month.

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- What to do: this is a working plan or a work plan
- It sits on your desk, not a shelf

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Add to the plan, cross things off as you progress

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- What to do:
 - Update the plan once a year
 - Do a one day Action Plan Retreat
 - Invite your partnering organization
 - Feed them. Beer and wine is okay

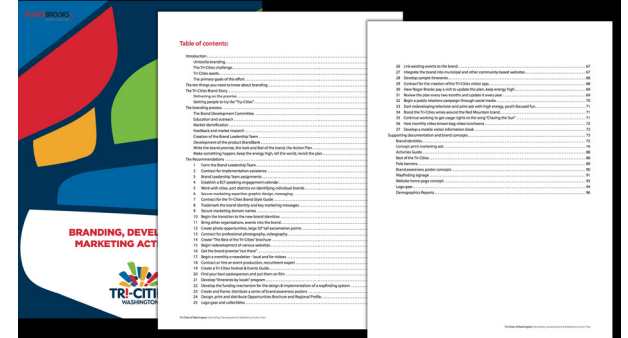
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At your Action Plan Retreat

At your Action Plan Retreat

- What to do:
 - Go back to the list of goals
 - Where did you succeed, or fail?
 - What can you do different or better to reach them?
- What to do:
 - If you reached your goals, add one (or two)

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Share your success

- What to do
 - Create a one-hour presentation
 - And then 20-minute versions

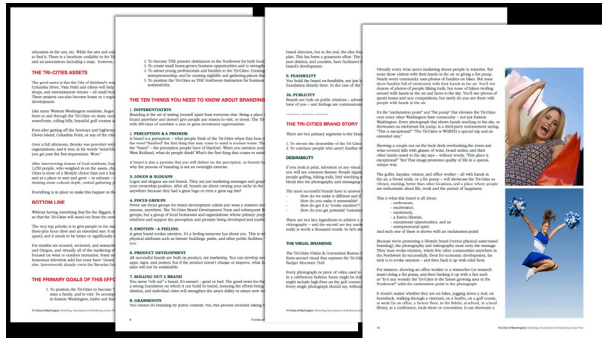
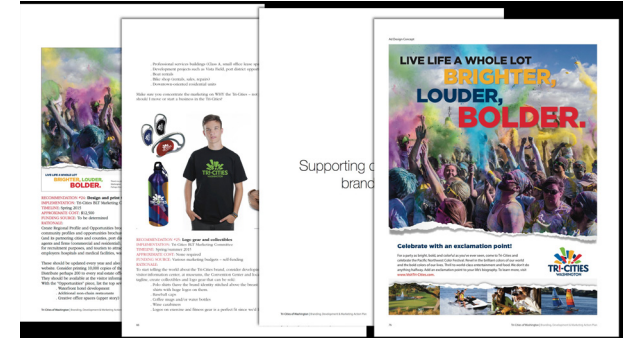
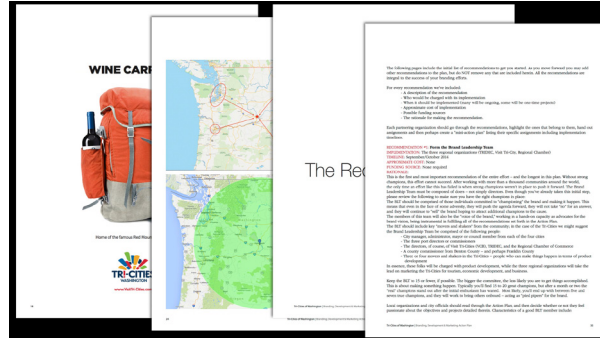
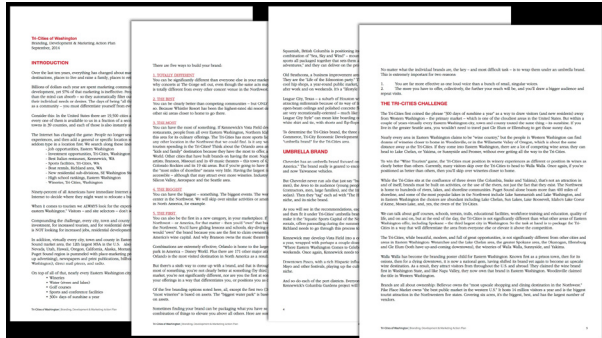
Watch the video: Deadwood, South Dakota

- Bit.ly/RBI-DBD
- Share the plan
 - City councils
 - Counties
 - State/provincial offices
 - Downtowns
 - Tourism
 - Economic Development
 - Kiwanis
 - Rotary
 - Garden clubs
 - Local marketers
 - Schools
 - Hospital boards
 - Business associations

Let's look at a plan

- Tri-Cities of Washington State
- Four cities, two counties, three port districts and several chambers of commerce
- Three lead organizations worked together
- Entire plan is less than 100 pages

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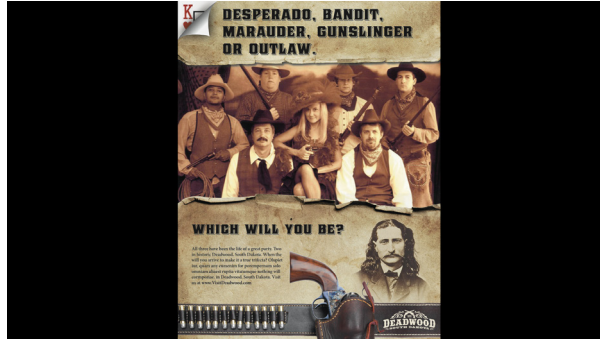
Keep it simple and to the point

- Includes specifics
- Easy to read
- Use samples and graphics where applicable
- Put further details in the supporting documentation section
- Becomes a to do list that is actionable and can be used as a working document
- Start with the vision, then get to the look and feel



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This applies to business
as much as communities.



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- What to do
 - Put together your plan creation team
 - Do a one-day retreat – brainstorm, record it
 - Develop the to do list
 - List them by timeline (today to month 24)
 - Include specifics (just bullet points)
 - Assign each to who will implement it
 - Then have someone write up the plan

Finally – this is a marketing document

- When someone reads it, they should be pumped, excited, enthused and ready to be a champion