Step number	Sequential steps activities tasks	Due date	Results	Responsibility	Whom to involve/contact	Budget and cost	Other categories

Definition of terms used in the action planning grid

Step number

Simple numbering is used most frequently to indicate the sequence of events, but you may use some other code if you like.

Sequential steps/activities/tasks

Enter, in chronological order, each task that is part of this activity. For example, if the step involves "data collection," then the tasks might be (1) develop operational definitions, (2) prepare checksheets, (3) test and refine checksheets, (4) train data collectors, (5) collect data.

Result

Each discrete step produces some result; for example, a report, a tangible change, a decision, a phone call, a meeting. There is always something that indicates the completion of a step. Enter here a word or phrase describing what that completion sign is for this step.

Responsibility

Enter here the name of one or two people who are responsible for seeing that this task gets done. Note: They do not necessarily carry out the action themselves. They may just coordinate the actions of others.

Due date

The calendar date when this step should be finished.

Whom to involve/contact

If appropriate, enter here the names of people who should be part of the team working on this task, or who should at least be contacted and informed of progress or events.

Budget/cost

If funds have been allocated for this activity, or if there is a limit to expenditures, enter that figure.

Other categories

Customers

This column lets you keep track of people who are particularly interested in or concerned about the successful outcome of this step or the project as a whole. Typically, this includes people whose work depends on what is accomplished at this step.

Limitations/specifications

Enter here any constraints under which the people involved with this step must operate, such as amount of time per week they can spend on the task, how many other people they can call on for help, the maximum time they can stop a process (if at all), and so forth. Note: You may also enter time and money limits here, though the categories of "budget" and "due date" usually indicate the same thing.

Hazards/pitfalls

Past experience with this activity may lead you to expect trouble in some form. Enter here any information that will help the team avoid pitfalls.

By-products

Many times a team will be given secondary objectives: "While you're at it, see if you can do this for another purpose." Although secondary purposes should not be allowed to interfere with the primary objectives of the activities, they should be allowed if they may lead to useful results without detracting.

FIGURE 14.3   Format for the Action Planning Grid
(*Source:* From Scholtes P, et al: *The team handbook: how to use teams to improve quality,* Madison, WI, 1988, Joiner Associates Inc.)