

Action planning worksheet

Who's working on this plan?	Jack, John
What is the change you would like to try?	Implement checklist & accordion file system
What is the outcome you want to achieve?	<i>...in order to...</i> Increase accuracy of submission of client-supplied data
List up to three targets you'd like to meet if the change was successful. (Observable, measurable, and timed.)	<ul style="list-style-type: none"> - 90% or more complete and accurate submissions for current tax year - System for requesting & checking client data is 100% complete by December 15

Task	Who?	When?	Support and resources
1. Design accordion files	Jack	6 Oct	Select client tax packages
2. Develop instructions/checklist for submitting data, using accordion files	Jack	13 Oct	Select client tax packages
3. Test instructions/checklist for accordion file preparation	Jack	20 Oct	John, Jill
4. Develop tools for screening accordion files for C/A	Jack	20 Oct	John, Jill
5. Order printing for accordion files & checklists	John	3 Nov	
6. Purchase envelopes for mailing files	John	3 Nov	Jack
7. Develop client letter explaining checklist/accordion file and incentives for use	Jack	3 Nov	John, Jill
8. Distribute client letter	John	15 Dec	
9. Check C/A submissions - early	Jack	31 Jan	Jill
10. Check C/A submissions - final	Jack	June	Jill, John