

Plan on a Page

[Activity\ task name, *e.g., Complaints Process*]

Author: [Name, Job title]

Work Owner: [Name, Job title]

THE CONTEXT – the reason for the work

[Provide a brief explanation of the context for the work, how it contributes to the team’s and organisation’s purpose and goals]

OBJECTIVES – what success looks like

[Outline what the work aims to achieve, in measurable terms]

STAKEHOLDERS – their interest and expectations

Stakeholder Group	Interest & Influence	Engagement Approach
[outline the individual/s and groups that have an interest in the work]	[describe the interest and influence the stakeholder/s have in the work]	[describe how impacted stakeholders will be engaged, and the frequency]

KEY RISKS – what might impact the success of the work

Risk	Mitigation actions
[describe the most likely and impactful scenarios that would limit your ability to achieve your objectives. Describe the risk itself and the impact it would have on the work if it occurred]	[describe the steps that will be taken to reduce the likelihood of the risk occurring or the impact it will have if it does occur]

SCOPE – what the work will and won’t include

In scope (what will be done)	Out of scope (what won’t be done)
[list the range of tasks the work will do] <div></div>	[list the range of tasks the work will not do] <div></div>

KEY RESOURCES – what’s needed to complete the work

People – their roles and responsibilities	Other
[list the people (and the proportion of their time) required to complete, explaining the role they’ll have in the work] <div></div>	[list the people (and the proportion of their time) required to complete, explaining the role they’ll have in the work] <div></div>

What will be done and when

Milestone	Date to be complete
[list the people (and the proportion of their time) required to complete, explaining the role they’ll have in the work]	
[e.g. sign-off on policy paper required]	

Signs that the work isn't going to plan

What you've agreed to do is changing

Refer back to your scope to check whether it was what you originally agreed to do. If it's out of scope, have a conversation with your manager to reiterate the agreed scope and explore the impacts of changing the scope on your ability to meet the agreed objectives, achieve the work in time and within budget. Update the plan if these things change.

A golden rule is that if changing the scope impacts your ability to achieve the objectives or doesn't contribute to achieving the objectives, it's unlikely to add value to the assignment and therefore may be unnecessary or more appropriate as a separate task.

Don't forget to keep your stakeholders informed of any changes to the work that impact their expectations, so they feel informed.

The milestones in your schedule aren't being met

Identify why the milestones aren't being met. It could be for a number of reasons including having been too optimistic about timeframes, not having enough resource or being dependant on other inputs.

Explain your situation, and the impact the issue causing delays is having with your manager. Enter the conversation with the goal of agreeing on what needs to change to get back on track. Be sure to go into the conversation with some options to solve the issue, enabling them to make an informed decision on the best way forward.

Your manager and/or stakeholders are asking for updates

It's likely your stakeholders feel uninformed or kept out of the loop. Consider establishing a weekly update to keep those who have an interest in the work involved in your progress. These could be email updates, a status report or an in person (/online) catch up.

You've already spent most of your budget and there's still plenty to be done

Identify why this has occurred. Have you underestimated the cost or forgotten to account for certain costs?

If your budget is constrained, consider classifying what is absolutely necessary to achieve your objectives, and what is a 'nice to have'. Alternatively, re-do your costing and re-present it to your manager for approval of additional budget. Be sure to outline to them why the work is costing more than anticipated and a few options for how to both stay within the overall budget (including what sacrifices would need to be made) and how much additional funding would be required to get back on track.

Your stakeholders are asking you what you're doing and why

This is likely because they don't understand the need for the work, and what benefit it will have to the organisation or their work. Ideally, you would have communicated with impacted and interested stakeholders at the beginning of the work, ensuring there is an opportunity for questions. This will ensure optimal support for you and your work.

However, it's never too late to explain to stakeholders the purpose of the work, how it will benefit the team and organisation and how you'll go about it.