

Action Plan

Adapted from an AF business seminar presentation by Greg Wolf

Implementing the action plan is the third and most practical aspect of the business planning process; it follows the long-term strategy and the annual strategic plan. While the value of a business plan is as much about the process of planning as it is about the finished product, it is also true that “any plan worth planning is a plan worth implementing.”¹

An action plan is about implementation. It speaks of doing. James says, “Be ye **doers** of the word, and not hearers only, deceiving your own selves.”² This does not mean that our efforts in business planning are on the same level as our efforts in living out Scripture. What it means is that we apply this principle of not crediting ourselves for our *intentions*—and therefore deceiving ourselves—but actually bringing something intended and planned into a living reality.

A business plan is tangible. It’s written down. It’s

something that you can get your hands on. Furthermore, since it is written down, it’s something you can share among those who care about the future of your business and have a vital interest in it. This sharing of written plans provides clarity. An action plan also provides a means of accountability.

Many business owners, often founders and fathers, have maintained a sense of business direction in their own heads but have failed to convey it to family members or employees who work closely in the business. This has typically led to confusion and conflict, resulting in inefficiency in the business and a loss of harmony among relationships. In that sense, the entire business plan is a means of planning and sharing a common sense of direction. The action plan component provides assurance that the business plan is actually moving toward a living reality as the actions planned are fulfilled.

Being doers of a plan also corresponds with the truth that we want our daily actions to relate to a larger purpose. By way of illustration, Jesus asked the question, “Wist ye not



¹ Ebener and Smith, *Strategic Planning*.

² James 1:22

that I must be about my Father's business?"¹ In our business settings and in the work we do, we believe that we are to be about our Father's business even as Jesus was at twelve years old.

A plan can even be a way to leverage our leadership across an organization, strengthening our ability to lead across generations of time. It gives me chills to think that the type of planners we are in our lifetimes, whether in our homes or in our businesses, will have an influence on our yet-unborn posterity.

Kingdom-focused Business

Kingdom-focused business—what does that really mean? It means we are living our lives, even in business, as if we are under an authority beyond ourselves. It means that somebody looking on can see that our business is different than businesses in the world. They may even wonder subconsciously, *Who is their king? They do things differently. Who's calling the shots? Is it the founder? Is it the dad, the president, or the CEO? Who is their king?*

We believe the one who is calling the shots is the Lord, the King of glory. To have a kingdom-focused business means having a business that is governed by the standards of our King, the Lord Jesus. We are about the King's business. This happens in our actions where the rubber meets the road. *Our walk talks, and our talk talks, but our walk talks louder than our talk talks*—our actions speak of whose authority we are under.

In business planning, we create a wealth of high-minded plans, but our business plans have no value sitting in a desk drawer. Implementing that which we have committed to do relates to Christian discipleship, which is not just about hearing but about doing.

Key Purpose of the Action Plan

Each of the different aspects of business planning has

a key purpose. For the action plan, the key purpose is *maintaining discipline for successful implementation*. Everything good in life requires discipline, and that's where the action plan comes in. Discipline is what keeps a business plan alive.

Of course, as we plan for success, we should say, "If the Lord will, tomorrow we will do this or do that."² We are willing to relinquish or redirect our plans tomorrow as we continue to seek the Lord's will. Changing our plans is part of the discipline in which we are engaged, in business as well as in all of life.

Many business plans end up on the bookshelf due to a lack of a credible action plan. What does an action plan look like? It may be simple and short, or it may be sophisticated and voluminous. Regardless of its complexity, an

action plan simply specifies what is to be done, by whom, and when. A fourth component is sometimes included—with what resources we are going to do it.

In our small family business, Family Food Store, one of our key strategies for the next year is to remodel the front end of our building. That incorporates a number of action plans, one of which is to get a builder involved to explore the design, cost, and time frame of a front-end remodel. We didn't know how many thousands of dollars we were even talking about; it had been a strategic idea of ours for a number of years but only talked about in the abstract. Only during this year's

annual strategic planning did it emerge as a key strategy that we wanted to plan around and build into our action plan.

Within Anabaptist Financial, we approach business advising in a similar way. We get into a business and attempt to learn what the problem is and why they have called on an Anabaptist Financial advisor for help. But rather than directing help only toward that specific problem, we attempt to shed light on the entire business

Our overarching desire is to glorify God in the conduct of our business. Our long-term strategy should express this. We want to honor the King in the way we do business, and our business plan expresses more specifically what we plan for that to look like.

¹ Luke 2:49

² James 4:15 "For that ye ought to say, If the Lord will, we shall live, and do this, or that."

plan or lack thereof. Our hope is that this helps to lead the client back to the very foundation—to what is believed about business and what it means to be about our Father's business. Then, a business plan can be developed to support that ultimate goal, as well as addressing the initial problem that prompted the call.

It is the action plan that makes the entire business planning process a living process. Remember, we don't want the plan to be put on the shelf or in the drawer; we want it to be the heartbeat of our business.

Context of the Action Plan

The different aspects of business planning are nested one within the other. The action plan nests within the annual strategic plan, which nests within the long-term strategy. It is through the fulfillment of the action plans throughout the year that our annual strategic plan comes to life and fruition and our long-term strategy is accomplished. All aspects of the business planning process should be integrated with each other so that what you do on a daily or weekly basis is consistent with the bird's-eye view represented by your long-term strategy.

Our overarching desire is to glorify God in the conduct of our business. Our long-term strategy should express this. We want to honor the King in the way we do business, and our business plan expresses more specifically what we plan for that to look like. In our family business, for example, we want to engage a particular set of customers in our particular market in a particular way with particular products and services. And we also want to do so by minimizing the amount of debt we have. These are all aspects of our business plan, but they all fall under our ultimate desire to glorify God in the conduct of our business. It's a beautiful thing that as the year unfolds and we fulfill our specific actions, we are actually in the process of accomplishing our broader long-term strategy.

Specifics of the Action Plan

"How do you eat an elephant?" an old joke goes. The answer: "One bite at a time, just like you eat anything else." That is what action planning is all about. It is taking the business plan you have created and breaking it down into bite-sized pieces of *who*, *what*, and *when*—who is going to do what by when? It is breaking down the annual strategic plan into quarterly, monthly, weekly, or daily to-dos.

Some personalities and businesses are more oriented around quarterly action plans versus monthly ones. How you break it down is an immaterial choice on your part. I like the quarterly breakdown of action plans in our little business; we talk frequently in terms of first quarter, second quarter, third quarter, and fourth quarter. We then plan our weekly tasks according to our quarterly goals, and the weekly pieces translate into our daily to-dos.

Action plans can be simple or sophisticated. Weekly and daily planning maintains discipline and a sense that what I do each day is a part of the bigger plan. Action planning is one of the ways we manage between the important and the urgent. We try to keep the important as front and center on our daily task list. Whether we're in our office or out meeting customers, there are always more than enough things in a day to derail us from those really important things that relate back to our long-term strategy. Remember, strategy has to do with the general's view of the battlefield. We can get lost in the fog of "war," so an action plan keeps us focused on what is important and not just on what is urgent.

Benefits of the Action Plan

Documentation. Action planning is simply documenting who is going to do what, by when, and what it's going to cost. One of the action plans we documented in our business plan was to look into the cost, timing, and magnitude of remodeling the front of our store. The action step had my name next to it. Now that I've started gathering information, we're going to have more decisions about *what* and *when* and *how* far we're going to go. But I had an action plan, and it wasn't an action plan for my daughters or for my wife to do; it was an action plan that I, Greg, had to fulfill. It was my responsibility to explore the cost and possibilities for remodeling the front end of our store.

Accountability. The other aspect of action planning is, *Did we get it accomplished or not?* Accountability is essential. The document that has an action plan on it also has to include its progress. You may have to revisit this action plan on a quarterly basis and ask, *Has this been completed? Yes, no, or in progress.* If the action has not been completed, ask, *Does it need to be re-planned? Does it need to remain alive, or is it something that can be discarded?* There's nothing wrong with re-planning an action with a

later date if circumstances require it.

In our quarterly planning meetings, we review the progress year-to-date for each of our annual plans. These annual plans include people (HR), finance, operations, marketing, and sales. We may look at a year-to-date P&L sheet, for example, and then review our action plan and re-plan where needed.

Keep in mind that an action plan relates to the key strategies you chose for the year and all of the primary areas of business. Accountability is essential to keep us all on track.

Collaboration. The execution of an action plan is both an individual and a group exercise. That's why we have progress meetings with our planning team throughout the year to evaluate the progress and completion of action plans as a group and as individuals.

The book of Proverbs says that "in the multitude of counsellors there is safety"¹ and "in the multitude of counsellors they (purposes) are established."² The entire process of business planning has been referred to as a "mutual path of discovery." This conveys that effective planning involves a journey with an uncertain outcome and is best done with others that also care about the outcome. In this article we have addressed the action plan aspect of the business plan; part of the discipline of business planning is to continue the mutual path of discovery through the group review of our action plans.

¹ Proverbs 11:14

² Proverbs 15:22

Group accountability sessions should be open, honest, and candid, but not about finger-pointing. Action plans will be correlated to job roles and performance reviews, but when we get together to evaluate progress on our action plans, it's not a beat-up session. It's not a time to point out what didn't get done; it's simply a time to talk about where we are, what we got accomplished, and how we keep our plan alive through the rest of the year.

Keep Moving

In conclusion, consider this quote: "Even if you are on the right track, you'll get run over if you just sit there."³ That relates to the quote we had at the beginning of the article that "any plan worth planning is worth implementing." Your plan is worth putting into action. It's worth keeping alive. It's worth maintaining the heartbeat of your plan and your business through the year as it unfolds. So, get on the right track, and more importantly, keep moving in the right direction.

It's helpful to circle back to the foundation of your plan and to the bird's-eye view from above. That is, in the course and conduct of our business, we want to remain busy about our Father's business. We want to remain in His will by seeking Him each day and in each decision we make. The process of business planning, including the action of doing, is at its essence a tool to help us manage that journey over time.

³ Will Rogers



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