



Operating Plan Overview

WHAT IS THE PURPOSE OF AN OPERATING PLAN?

The purpose of an operating plan is to detail:

1. the problem that exists (why) - explicitly citing the data the organization has collected with regard to the issue
2. the intervention (what) that will be applied to change the outcome
3. the exact processes (how) that will need to be taken to apply the intervention
4. a plan (when) to execute those processes with specific dates and personnel (who)
5. the desired outcome (the measurable goal)

Effective documenting of the operating plan ensures that the organization will deliver productive results. Operating plans also serve as a meaningful communication tool. Sharing these plans with leaders helps articulate work and progress with regard to critical elements of organizational development.

WHAT IS NEEDED TO PREPARE TO CRAFT AN OPERATING PLAN?

1. Schedule time for the body of this work. Developing an operating plan for each goal takes concerted mental capacity. It is valuable to block off 3-5 days. Ensuring the work can be completed in consecutive days enhances the efficiency and clarity of the end product. Stepping away from the work for days or months on end will require time to reacquaint oneself with the work each time coming back to it.
 - a. **Day One:** Gather all of the data you have captured and begin identifying goals. When assessing all of the ways in which the organization could make progress, it can become overwhelming to identify where to begin. That data will reveal the most emergent needs of employees. The organization should prioritize those.
 - b. **Day Two:** Draft elements of why, what, how, when, and measurable goals. Depending on the number of goals and the complexity of the operations, it may take a day for each one. Leave plenty of time for creative thinking. Limited time forces production over creative problem-solving. An operating plan details how the organization will solve a problem. This is creative work.
 - c. **Day Three:** Develop a second draft that adds additional layers of details to the original high-level draft of each plan element. The more detail that can be outlined, the better the plan.
 - d. **Day Four:** Write the plan using the template in this Benchmark toolkit.)

WHAT IS THE SUGGESTED NUMBER OF OPERATING PLANS?

Operating plans detail critical elements of organizational development toward a specific goal. The number of plans depends on the areas in which the organization intends to improve each year. Another variable to consider is the complexity of each area of development. Just as it is essential to consider the workload of an individual employee, it is also important to consider what the organization can reasonably accomplish in a year. Outlining operating plans for 3-5 goals is average. Fewer goals may be applied if there is greater complexity. Whereas more goals may be applied if there is less complexity.