

# Growth Action Plan Worksheet



## How to Use the Growth Action Plan Worksheet

- Using input from multiple stakeholders, choose 1-2 strategies from **within the ten key planning areas** to work on during the next year. In the index below, mark the box to the left of the strategy you have chosen to work on. Space is provided to add your own strategy.  
**Note:** It is recommended that at least one strategy be selected for each key planning area. However, the needs, experiences and priorities for self-management education (SME) providers can differ considerably.
- On the next pages (45-47), mark the box to the left of the strategy you have selected, and then write-in the first major activity. Please designate a strategy number (i.e. 7.2) for each action step/timeline and include an estimated date for completion.
- Indicate your level of confidence in achieving the activity by the date selected. Consistent with self-management goal-setting, activities should have a high level of confidence (score of 7 or greater) to be included in the Growth Action Plan.
- It is recommended that this worksheet be updated twice per year.

### #1: Revenue

- 1.1 Service Fee Schedule
- 1.2 Discounts and Deals
- 1.3 Competitive Grant Application
- 1.4 Grant Partner or Subcontractor
- 1.5 Local Foundations
- 1.6 Service Contracts
- 1.7 Charitable Contributions
- 1.8 \_\_\_\_\_

### #2: Marketing

- 2.1 Key Messages
- 2.2 Collateral Materials
- 2.3 Presentations and Forums
- 2.4 Earned Media
- 2.5 Social Media
- 2.6 Open House
- 2.7 Word-of-Mouth Campaign
- 2.8 Branding
- 2.9 Public Service Announcements
- 2.10 Point of Sale Promotions
- 2.11 \_\_\_\_\_

### #3: Referral Network

- 3.1 Identify Prospective Partner
- 3.2 Formalize Partnership Agreements
- 3.3 Referral Intake Process
- 3.4 Offer Partnership Tiers
- 3.5 Public Recognition
- 3.6 Assess Needs of Partners
- 3.7 Provide Feedback
- 3.8 Leadership
- 3.9 \_\_\_\_\_

### #4: Competition

- 4.1 Local Competitor Identification
- 4.2 New Entrants
- 4.3 Services Available Outside the Market
- 4.4 Competitor Objectives and Strategies
- 4.5 Competitor Resources and Capabilities
- 4.6 Competitor Forecast Profile
- 4.7 Collaboration with Competitors
- 4.8 Reduce Competition
- 4.9 \_\_\_\_\_

### #5: Service Operations

- 5.1 Master Trainers
- 5.2 Leader Identification
- 5.3 Leader Training
- 5.4 Leader Retention
- 5.5 Menu of Service Options
- 5.6 Consistent Course Offerings
- 5.7 Quality Assurance and Fidelity
- 5.8 \_\_\_\_\_

### #6: Evaluation

- 6.1 Case for Data Collection
- 6.2 Data Collection Methods
- 6.3 Program Evaluation
- 6.4 Communicating Outcomes
- 6.5 \_\_\_\_\_

### #7: Organizational Support

- 7.1 Statement of Organization Alignment
- 7.2 Champions
- 7.3 Clarify Roles and Organization Structure
- 7.4 Patient Care Team Integration
- 7.5 Volunteer Management
- 7.6 Succession Planning
- 7.7 Participant Advisory Council
- 7.8 Staff Training and Education
- 7.9 \_\_\_\_\_

### #8: Community Support

- 8.1 Advisory Council
- 8.2 Community Health Coalition Program
- 8.3 Local, Influential Leaders
- 8.4 New Partnerships
- 8.5 Expert Presentations and Training Programs
- 8.6 \_\_\_\_\_

### #9: Advocacy

- 9.1 Join Policy Development Organization
- 9.2 Community Needs Assessment
- 9.3 Develop Talk Points
- 9.4 Educate Elected Officials
- 9.5 \_\_\_\_\_

### #10: Resource Linkages

- 10.1 Active with MAOP
- 10.2 Program Curriculum Originators
- 10.3 Professional Association Memberships
- 10.4 \_\_\_\_\_

**Active Strategies****Confidence Level****Active Strategies****Confidence Level****#1: Revenue**

- 1.1 Service Fee Schedule 1 2 3 4 5 6 7 8 9 10
- 1.2 Discounts and Deals 1 2 3 4 5 6 7 8 9 10
- 1.3 Competitive Grant Application 1 2 3 4 5 6 7 8 9 10
- 1.4 Grant Partner or Subcontractor 1 2 3 4 5 6 7 8 9 10

- 1.5 Local Foundations 1 2 3 4 5 6 7 8 9 10
- 1.6 Service Contracts 1 2 3 4 5 6 7 8 9 10
- 1.7 Charitable Contributions 1 2 3 4 5 6 7 8 9 10
- 1.8 \_\_\_\_\_ 1 2 3 4 5 6 7 8 9 10

**Next Action Steps(s) and Timeline:****#2: Marketing**

- 2.1 Key Messages 1 2 3 4 5 6 7 8 9 10
- 2.2 Collateral Materials 1 2 3 4 5 6 7 8 9 10
- 2.3 Presentations and Forums 1 2 3 4 5 6 7 8 9 10
- 2.4 Earned Media 1 2 3 4 5 6 7 8 9 10
- 2.5 Social Media 1 2 3 4 5 6 7 8 9 10
- 2.6 Open House 1 2 3 4 5 6 7 8 9 10

- 2.7 Word-of-Mouth Campaign 1 2 3 4 5 6 7 8 9 10
- 2.8 Branding 1 2 3 4 5 6 7 8 9 10
- 2.9 Public Service Announcements 1 2 3 4 5 6 7 8 9 10
- 2.10 Point of Sale Promotions 1 2 3 4 5 6 7 8 9 10
- 2.11 \_\_\_\_\_ 1 2 3 4 5 6 7 8 9 10

**Next Action Steps(s) and Timeline:****#3: Referral Network**

- 3.1 Identify Prospective Partners 1 2 3 4 5 6 7 8 9 10
- 3.2 Formalize Partnership Agreements 1 2 3 4 5 6 7 8 9 10
- 3.3 Referral Intake Process 1 2 3 4 5 6 7 8 9 10
- 3.4 Offer Partnership Tiers 1 2 3 4 5 6 7 8 9 10

- 3.5 Public Recognition 1 2 3 4 5 6 7 8 9 10
- 3.6 Assess Needs of Partners 1 2 3 4 5 6 7 8 9 10
- 3.7 Provide Feedback 1 2 3 4 5 6 7 8 9 10
- 3.8 Leadership 1 2 3 4 5 6 7 8 9 10
- 3.9 \_\_\_\_\_ 1 2 3 4 5 6 7 8 9 10

**Next Action Steps(s) and Timeline:**

**Active Strategies****Confidence Level****Active Strategies****Confidence Level****#4: Competition**

- 4.1 Local Competitor Identification 1 2 3 4 5 6 7 8 9 10
- 4.2 New Entrants 1 2 3 4 5 6 7 8 9 10
- 4.3 Services Available Outside the Market 1 2 3 4 5 6 7 8 9 10
- 4.4 Competitor Objectives and Strategies 1 2 3 4 5 6 7 8 9 10

- 4.5 Competitor Resources and Capabilities 1 2 3 4 5 6 7 8 9 10
- 4.6 Competitor Forecast Profile 1 2 3 4 5 6 7 8 9 10
- 4.7 Collaboration with Competitors 1 2 3 4 5 6 7 8 9 10
- 4.8 Reduce Competition 1 2 3 4 5 6 7 8 9 10
- 4.9 \_\_\_\_\_ 1 2 3 4 5 6 7 8 9 10

**Next Action Steps(s) and Timeline:****#5: Service Operations**

- 5.1 Master Trainers 1 2 3 4 5 6 7 8 9 10
- 5.2 Leader Identification 1 2 3 4 5 6 7 8 9 10
- 5.3 Leader Training 1 2 3 4 5 6 7 8 9 10
- 5.4 Leader Retention 1 2 3 4 5 6 7 8 9 10

- 5.5 Menu of Service Options 1 2 3 4 5 6 7 8 9 10
- 5.6 Consistent Course Offerings 1 2 3 4 5 6 7 8 9 10
- 5.7 Quality Assurance and Fidelity 1 2 3 4 5 6 7 8 9 10
- 5.8 \_\_\_\_\_ 1 2 3 4 5 6 7 8 9 10

**Next Action Steps(s) and Timeline:****#6: Evaluation**

- 6.1 Case for Data Collection 1 2 3 4 5 6 7 8 9 10
- 6.2 Data Collection Methods 1 2 3 4 5 6 7 8 9 10
- 6.3 Program Evaluation 1 2 3 4 5 6 7 8 9 10

- 6.4 Communicating Outcomes 1 2 3 4 5 6 7 8 9 10
- 6.5 \_\_\_\_\_ 1 2 3 4 5 6 7 8 9 10

**Next Action Steps(s) and Timeline:**

**Active Strategies****Confidence Level****Active Strategies****Confidence Level****#7: Organizational Support**

- 7.1 Statement of Organization Alignment 1 2 3 4 5 6 7 8 9 10
- 7.2 Champions 1 2 3 4 5 6 7 8 9 10
- 7.3 Clarify Roles and Organization Structure 1 2 3 4 5 6 7 8 9 10
- 7.4 Patient Care Team Integration 1 2 3 4 5 6 7 8 9 10

- 7.5 Volunteer Management 1 2 3 4 5 6 7 8 9 10
- 7.6 Succession Planning 1 2 3 4 5 6 7 8 9 10
- 7.7 Participant Advisory Council 1 2 3 4 5 6 7 8 9 10
- 7.8 Staff Training and Education 1 2 3 4 5 6 7 8 9 10
- 7.9 \_\_\_\_\_ 1 2 3 4 5 6 7 8 9 10

**Next Action Steps(s) and Timeline:****#8: Community Support**

- 8.1 Advisory Council 1 2 3 4 5 6 7 8 9 10
- 8.2 Community Health Coalition Program 1 2 3 4 5 6 7 8 9 10
- 8.3 Local, Influential Leaders 1 2 3 4 5 6 7 8 9 10

- 8.4 New Partnerships 1 2 3 4 5 6 7 8 9 10
- 8.5 Expert Presentations and Training Programs 1 2 3 4 5 6 7 8 9 10
- 8.6 \_\_\_\_\_ 1 2 3 4 5 6 7 8 9 10

**Next Action Steps(s) and Timeline:****#9: Advocacy**

- 9.1 Join Policy Development Organization 1 2 3 4 5 6 7 8 9 10
- 9.2 Community Needs Assessment 1 2 3 4 5 6 7 8 9 10

- 9.3 Develop Talk Points 1 2 3 4 5 6 7 8 9 10
- 9.4 Educate Elected Officials 1 2 3 4 5 6 7 8 9 10
- 9.5 \_\_\_\_\_ 1 2 3 4 5 6 7 8 9 10

**Next Action Steps(s) and Timeline:****#10: Resource Linkages**

- 10.1 Active with MAOP 1 2 3 4 5 6 7 8 9 10
- 10.2 Program Curriculum Originators 1 2 3 4 5 6 7 8 9 10

- 10.3 Professional Association Memberships 1 2 3 4 5 6 7 8 9 10
- 10.4 \_\_\_\_\_ 1 2 3 4 5 6 7 8 9 10

**Next Action Steps(s) and Timeline:**