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**SOP- Creating a Monthly Action Plan- Systems Vault**

**PREREQUISITE**

[Master: SOP- Strategy Sessions- Systems Vault](https://docs.google.com/document/d/1NRfraBF2DpZ-FGLz2vqGMNE5y6zfVduIP7Pd3Wc_lnc/edit?usp=sharing)

[SOP- Strategy Sessions with Existing Clients- Systems Vault](https://docs.google.com/document/d/1NRfraBF2DpZ-FGLz2vqGMNE5y6zfVduIP7Pd3Wc_lnc/edit?usp=sharing)

[Template: Monthly Action Plan- Systems Vault](https://docs.google.com/document/d/1YrbDgqqOZv-l7MElMi3M2iO-8bg2zqvqHq7LLwGnNeg/edit)

**PURPOSE**

Action Plans are sent in the beginning of each month + after every strategy call with a client or periodically when timelines and planning need to happen.

* If there will not be a strategy call in the first week of the month, create a monthly action plan so that the client knows what we are working on.
* We create action plans after every strategy call. This is our way of verifying that both us and the client have the same expectations and plans for the month

Action plans should set their expectations of the time period ahead. The action plan should be a feasible set of projects you plan to work on / complete over the time that you have.

**POLICY**

If you are creating a beginning of the month action plan (prior to a monthly strategy call / to replace a monthly strategy call), consult Sarah on the plan in the next SCRUM meeting.

After each meeting with a client, send an action plan with the plan that was agreed upon in the meeting.

**PARTY**

OBMs

**PROPERTY**

Agency Manager / Lead OBMr

**PROCESS**

Part 1: Outline Action Plan

Part 2: Send Plan to Client

**PROCEDURE**

**Part 1: Outline Action Plan**

1. Outline your plan of action for the month ahead, this will vary from client to client
   1. Take into consideration recurring monthly tasks and how much time it takes out of the retainer
   2. With the time left in the retainer, plan what you can achieve in the month
      1. This should be based on conversations that you have had with the client / Sarah / last month's projects that weren’t finished.
   3. Always leave buffer time for unexpected items
2. Save the plan of action to the appropriate client folder.

**Part 2: Send Plan to Client**

1. Use the [SN Template (Email): Monthly Action Plan- Systems Vault](https://docs.google.com/document/d/1YrbDgqqOZv-l7MElMi3M2iO-8bg2zqvqHq7LLwGnNeg/edit) and send the plan in an email to client

**Created by:**

**Department:**

**Date:**

**Revised:**

**Revised by:**