



IDEAS TO PRACTICE

Tool 3: Implementation Outline

Use this tool to outline an implementation plan for an activity that you plan to integrate into your tax services.

The resulting outline should give you a good idea of what it will take to implement the activity, including materials, staffing, and funding that you will need. The outline will also give you some initial ideas on how you might demonstrate the impact of the activity.

Getting started

This tool was designed for use in group planning session, but you can also use it on your own.

Complete a copy of this tool for each activity idea that you selected as the final step of **Tool 2: Effort and Impact Matrix**.

- 1. Develop an implementation outline for each activity you plan to implement.** Develop the broad strokes of a plan for implementing each activity. It is helpful to do this in a group because each member will bring a different perspective based on their role within the organization.
Your colleagues may think of resources that you may not have considered.
- 2. Start by focusing in Column 1.** In that column, list up to five of the most important steps necessary to implement the activity. Concentrate on the major things that need to happen for the activity to succeed, not the more minor details. They can be in any order. The goal is to identify the important steps and worry about sequence later.
- 3. Now complete the other columns, working row-by-row.** For the step, you identified in the first row, identify who should be responsible, what barriers or resistance they might encounter, and what resources and support could help accomplish the step.



When you have finished, consider using **Tool 4: Implementation Plan Detail** to take your planning further. That tool can be completed as a group or assigned to a member of your planning team to complete on their own and later shared with others.

TOOL 3: IMPLEMENTATION OUTLINE

Activity: _____

| Important Steps | By Whom | Potential Barriers or Resistance | Resources and Support |
|-----------------|---------|----------------------------------|-----------------------|
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