



## Take Action



Remember the advice from Sun Tzu:

***Planning without action is futile. Action without planning can be fatal.***

Developing a plan to Take Action for implementation in your organization is the culmination of the New Tactics ***Strategic Effectiveness Method***. In this step, all the previous steps come together and you create a solid action plan for your organization. This is the time to further reflect on Sun Tzu's three sources of information and the work that you have done in this training in order to first develop a ***strategic path***, second, an ***immediate goal***, and third, a ***plan to take action*** for your group's advocacy work.

In this step, your group will use the information collected in the previous steps to discuss and identify an immediate goal which the group determines is important to achieve in order to address their stated problem. This is HOW your group will take a step toward making their vision a reality.

### Objectives:

- ✓ To review the strategic path in order to choose an immediate goal to address the problem.
- ✓ To review the target for this goal.
- ✓ To conduct a critical review of tactics to implement in order to achieve the goal.
- ✓ To bring all the previous processes into a concrete **plan to take action**.
  - Examine and identify roles, responsibilities, resources, risks, and opportunities
  - Develop a timeline to carry out the plan
- ✓ To practice evaluating strategic goals as plans of action are developed and implemented.

It is important to bring together the information the group has identified in the exercises throughout the previous steps. The group will review the strategic path and the immediate goal that they identified to lead them toward their vision. This review is done in order to **develop a plan to take action** and to identify specific action steps to be taken. To do this, the group will review their first immediate goal in addressing their problem. Next, the group will review the target and conduct a critical review of the tactic(s) most likely to move forward this goal. Last, the group will identify and create a plan for implementing the tactics that are most effective and practical (given the target, their resources and capacity) for achieving their goal.



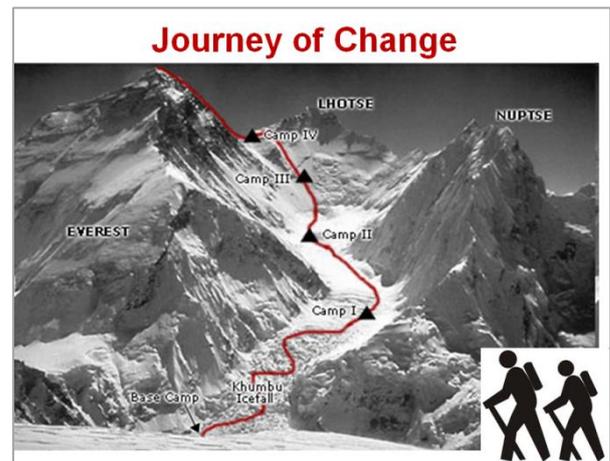
## First: Review the Identified Immediate (SMART) Goal.

Before developing a plan to take action, there is another opportunity to review the information gathered in the previous steps. In the creation of a **Strategic path**, the group will review their problem statement, vision statement, and the tools for analyzing the terrain, the potential targets on their tactical map and spectrum of allies, and the variety of tactics that they explored in step four. They have determined one immediate goal that will be an effective first step for moving them closer to their **vision**. Thinking critically about all of this information, the group will now critically review their tactic(s) according to their resources and capacities to develop a plan of action.

If we return to the example of the mountain, remember that there are multiple camps along the way up the mountainside. In order to get from one point to another we need to plan, strategize, and implement well-chosen tactics that will help us move one step up the mountain towards our vision.

With the **strategic path** that will move you up the mountainside, it is important to remember that there will be multiple goals along the way; however,

it is impossible to foresee all of those goals from the start. Nonetheless, if everyone does not agree on an effective first goal for the group, it will be very difficult to start working effectively as a team. This is an opportunity to ensure that the group has decided on their immediate goal.



## Second: Review the Identified Target

Now that the group has identified the first goal on their strategic path, it is time to re-evaluate the target they selected. Each time we identify a new goal in our activist efforts, it's important to return to the view of the terrain and the spectrum of allies, in order to make sure that we are focusing on the target that will most likely help us reach our goal, and to ensure that we don't overlook the target that has the most positive potential for our efforts! The strategic path is useful for not only identifying goals, but also effectively selecting targets that help us to reach those goals.

## Third: Critical Review of the Tactic(s).

Not all tactics will work for all targets. It is important that once the group has identified the most appropriate and strategic target on which to focus, that they re-visit the options they see for their tactics. Tactics must be critically evaluated in an ongoing manner, for their appropriateness for the chosen target, for the group's capacity in terms of resources, and for their effectiveness in achieving the identified goal. In this section, the "Exercise for the Critical Evaluation of Tactics" will help you guide the groups in evaluating and choosing from the tactics they explored in Step four.



**Fourth: Create a Plan to Take Action.**

The plan to take action is a tool that helps the group identify the series of tasks they will need to complete in order to carry out the tactic they identified on their chosen target. In step five, the group will use the plan of action as a tool that will help them achieve the first goal on their strategic path. This is a tool that allows for planning AND accountability. It details what tasks should be done, what resources are needed for each task, who will complete each task, and identifies a timeline for when each task should be completed. After the tasks are complete, groups are encouraged to re-visit the plan of action tool as they move forward in their organizing efforts, as a way to self-evaluate and re-group, since the terrain in which they are working shifts and changes.

The **Plan to Take Action** brings together all of the following information (use the *Explore Tactics Worksheet – Strategy & Tactic Summary*):

**Strategy**

- *Problem*: Issue you identified to be resolved.
- *Vision*: What the world will be like after your Problem is solved.
- *Goal*: The **incremental step** you take on the **strategic path** towards reaching your vision.

**Tactics**

- *Target*: The person who can help you to reach your goal (Think strategically about who your target should be, use the Spectrum of Allies tool to help you identify the Target)
- *Chosen Tactic*: The set of actions you take so your Target will give you what you want in order to reach your goal (from “brainstorm” of tactic ideas)
- *Constituents*: The list of people and organizations that are (or can be) influenced by your Tactic (from Tactical Map and Spectrum of Allies)
- *Risks and Opportunities*: What you should be aware of as the result of this action

**Action**

- *Plan to Take Action*: **Specific tasks** you do to complete your **Tactic** and reach your **Goal**

**Figure 1** provides an example format to begin the process of listing the information along with the many tasks that must be carried out in order to implement a *Plan of Action*. Now is the time to determine what concrete steps are needed to carry out the plan: a target and tactic(s) selected to move a goal forward (strategy); the steps to carry out the tactic (tasks); what resources are needed; who will be involved in ensuring that the tactics are carried out (accountability); and where and when (timeframe) to ensure that the plan of action will move forward.

Figure 1

## Plan to Take Action

SMART Goal: \_\_\_\_\_

Target: \_\_\_\_\_

Objective for Target: \_\_\_\_\_

Chosen Tactic: \_\_\_\_\_

S – Specific / Strategic (actions that move you toward your goal)

M – Measurable (responsibility has been assigned; and you can “see” results)

A – Achievable (within the resources of your group)

R – Relevant / Realistic (action is sensible & within the capacity of your group)

T – Time bound (a date and time have been identified)

What is the action or task?	How will you implement this action?			What resources are needed? (human, economic, material)	
	What steps are needed?	When will it happen?	Who is responsible?	What do you HAVE?	What do you NEED?



## Future Work and Planning: Implement and Evaluate the Results of Your Tactic

The group is now ready to actually implement the **Plan to Take Action**. The Five Steps to Strategic Effectiveness are not complete until the *Plan to Take Action* is actually carried out. It is especially important to evaluate how well these tactics moved the selected target to achieve an objective; and how well this plan of action impacted the strategic goal in addressing the issue and moving toward the vision.

***Strategic effectiveness and tactical innovation will require constant and on-going review.***

The gathering of Sun Tzu's three sources of knowledge is on-going. Information and conditions change based on your actions and the actions of your opponents. Take time to evaluate the implementation of your plan and what changes have occurred with the identified problem, and use the Strategy Toolkit again.

Just as tactics require evaluation and review, the same is true for strategy. **Figure 2** provides a visual look at the on-going process of strategy review. The **Strategic Effectiveness Method** is meant to be revisited frequently throughout your group's activism. As you move forward with your advocacy work, it is necessary to revisit each step and review the tools – such as the Tactical Map and the Spectrum of Allies – to see how the plan developed to take action impacts the target, the relationships surrounding the target, and the problem itself. It is necessary to add new relationships as more information is gathered or to see where the tactics have created shifts or changes.

Use this step-by-step guide to continually identify the ever-changing relationships and context regarding your human rights issue. This reflection and examination will help to provide new information and insights for choosing new immediate goals on the strategic path, new targets and tactics that respond to the changing needs and demands of the terrain, in order to develop a new plan to take action for implementation. It is important to continually assess the results, apply the lessons you learn, and evaluate your progress in order to make adjustments to your strategy and better enhance your chances of creating the change you are working toward.

Figure 2

