

Action Plan Template

Free action plan template with six plan-type variants and the universal seven-section structure. Replace example content with your own goal, tasks, owners, and deadlines.

Source: ActionPlanTemplate.com (operated by Digital Signet).

Last verified: 11 May 2026

Universal Seven-Section Structure

Every action plan on this site uses this seven-section structure. The structure works for any goal, any team size, and any timeframe.

#	Section	Description
1	Goal and Objective	SMART goal statement with measurable success criteria.
2	Success Criteria	3-5 specific, quantifiable outcomes that define completion.
3	Task Breakdown	Each task with owner, deadline, priority, status, and dependencies.
4	Resources Required	Budget, tools, people, and external support needed.
5	Risk Assessment	Top 5 risks with probability, impact, and mitigation strategies.
6	Timeline and Milestones	Key dates, phase gates, and mid-point review checkpoints.
7	Review Schedule	Weekly check-ins, mid-point review, and final assessment dates.

Business Action Plan

Quarterly and annual business goals, revenue targets, and department initiatives.

Example goal

Increase Q2 revenue by 15 percent (from 45,000 to 51,750 dollars) by 30 June 2026

Task breakdown

#	Task	Owner	Deadline	Priority	Status	Dependencies / Phase
1	Launch new landing page with A/B test variations	Sarah (Marketing)	5 April 2026	High	Not started	
2	Hire 2 SDRs and complete onboarding	Mike (HR)	20 March 2026	High	Not started	
3	Implement upsell workflow in checkout	Dev Team Lead	15 April 2026	High	Not started	Blocked by #1
4	Run LinkedIn ad campaign (5,000 dollar budget)	Sarah (Marketing)	1 April - 31 May	Medium	Not started	Blocked by #1
5	Launch customer referral program	Product Lead	10 April 2026	Medium	Not started	
6	Renegotiate top 3 enterprise contracts	Account Manager	15 May 2026	High	Not started	
7	Mid-quarter review with all stakeholders	VP Revenue	1 May 2026	Medium	Not started	
8	Final Q2 results analysis and report	VP Revenue	7 July 2026	Medium	Not started	

Review schedule

Weekly check-in: 15 minutes every Monday. Review what was completed, what is behind schedule, what is blocked, and what needs to be reassigned. Mid-point review at the halfway date. Final assessment at the deadline.

Corrective Action Plan (CAPA)

Quality incidents and compliance issues using the 5-step CAPA process.

Example goal

Resolve customer data breach incident and prevent recurrence within 45 days

Task breakdown

#	Task	Owner	Deadline	Priority	Status	Dependencies / Phase
1	Isolate affected database servers	CTO	Within 2 hours	High	Not started	
2	Notify legal counsel and insurance carrier	General Counsel	Within 4 hours	High	Not started	
3	Assess scope of compromised records	Security Lead	Within 24 hours	High	Not started	Blocked by #1
4	Notify affected customers per state laws	Communications	Within 72 hours	High	Not started	Blocked by #3
5	Engage forensic security firm	CTO	Within 48 hours	High	Not started	
6	Patch vulnerability that enabled breach	Engineering Lead	Within 1 week	High	Not started	Blocked by #5
7	Implement enhanced encryption at rest	Security Lead	Within 30 days	Medium	Not started	
8	Deploy intrusion detection system	Security Lead	Within 45 days	Medium	Not started	

Review schedule

Weekly check-in: 15 minutes every Monday. Review what was completed, what is behind schedule, what is blocked, and what needs to be reassigned. Mid-point review at the halfway date. Final assessment at the deadline.

Employee Performance Plan

Performance improvement plans (PIPs) and development plans for HR.

Example goal

Improve sales rep quota attainment from 62 percent to 90 percent within 60 days

Task breakdown

#	Task	Owner	Deadline	Priority	Status	Dependencies / Phase
1	Weekly 1:1 coaching with manager (45 min)	Manager	Weekly Monday	High	Not started	
2	Complete advanced discovery training	Employee	End of week 2	High	Not started	
3	Shadow top performer on 5 calls	Employee	End of week 3	High	Not started	
4	Achieve 10 booked discovery meetings per week	Employee	End of week 4	High	Not started	
5	Improve discovery to close rate to 25 percent	Employee	End of week 8	High	Not started	
6	Hit quota of 8 closed deals	Employee	End of week 8	High	Not started	
7	Mid-PIP review and adjustment	Manager + HR	End of week 4	Medium	Not started	
8	Final PIP outcome decision	Manager + HR	End of week 8	High	Not started	

Review schedule

Weekly check-in: 15 minutes every Monday. Review what was completed, what is behind schedule, what is blocked, and what needs to be reassigned. Mid-point review at the halfway date. Final assessment at the deadline.

Marketing Action Plan

Campaigns, content marketing, paid acquisition, and product launches.

Example goal

Generate 250 marketing qualified leads (MQLs) in Q2 from content and paid channels

Task breakdown

#	Task	Owner	Deadline	Priority	Status	Dependencies / Phase
1	Publish 6 SEO-optimised blog posts	Content Lead	End of April	High	Not started	
2	Launch LinkedIn ads campaign (10,000 dollar budget)	Paid Acquisition	1 April 2026	High	Not started	
3	Refresh top 5 landing pages for conversion	Web Lead	15 April 2026	High	Not started	
4	Email nurture sequence for new subscribers	Email Lead	30 April 2026	Medium	Not started	
5	Host one webinar with 100 registrations	Demand Gen	15 May 2026	Medium	Not started	
6	Co-marketing partnership with one peer brand	Partnerships	31 May 2026	Medium	Not started	
7	Weekly attribution review	Marketing Ops	Weekly Friday	Medium	Not started	
8	Q2 results report to leadership	VP Marketing	5 July 2026	Medium	Not started	

Review schedule

Weekly check-in: 15 minutes every Monday. Review what was completed, what is behind schedule, what is blocked, and what needs to be reassigned. Mid-point review at the halfway date. Final assessment at the deadline.

SMART Goals Action Plan

Goal-setting structured around the Specific-Measurable-Achievable-Relevant-Time-bound framework.

Example goal

SMART: Run a 5km race in under 28 minutes by 31 August 2026 (S, M, A, R, T validated)

Task breakdown

#	Task	Owner	Deadline	Priority	Status	Dependencies / Phase
1	Complete week 1 base mileage (15km total)	Self	End of week 1	High	Not started	
2	Run first interval workout (5 x 800m)	Self	End of week 2	High	Not started	
3	Complete trial 5km time trial	Self	End of week 4	High	Not started	
4	Increase weekly mileage to 25km	Self	End of week 6	High	Not started	
5	Add tempo runs (2 x 2km at goal pace)	Self	End of week 8	High	Not started	
6	Race-pace simulation (4km solo)	Self	End of week 10	Medium	Not started	
7	Taper week (reduce volume 40 percent)	Self	Week 12	Medium	Not started	
8	Race day execution	Self	31 August 2026	High	Not started	

Review schedule

Weekly check-in: 15 minutes every Monday. Review what was completed, what is behind schedule, what is blocked, and what needs to be reassigned. Mid-point review at the halfway date. Final assessment at the deadline.

30-60-90 Day Action Plan

Phased onboarding and initiative rollouts across three escalating phases.

Example goal

Successfully onboard as Engineering Manager and ship one team-wide improvement by day 90

Task breakdown

#	Task	Owner	Deadline	Priority	Status	Dependencies / Phase
1	Meet each of 8 direct reports for 1:1	Self	Day 14	High	Not started	Phase 1: Learn
2	Audit current sprint velocity and incidents	Self	Day 21	High	Not started	Phase 1: Learn
3	Document team strengths and gap analysis	Self	Day 30	Medium	Not started	Phase 1: Learn
4	Run first retro and ship one quick win	Self	Day 45	High	Not started	Phase 2: Contribute
5	Establish weekly office hours cadence	Self	Day 45	Medium	Not started	Phase 2: Contribute
6	Propose roadmap adjustment to leadership	Self	Day 60	High	Not started	Phase 2: Contribute
7	Drive team-wide improvement initiative	Self	Day 75	High	Not started	Phase 3: Lead
8	Quarterly review and next-90 plan	Self	Day 90	High	Not started	Phase 3: Lead

Review schedule

Weekly check-in: 15 minutes every Monday. Review what was completed, what is behind schedule, what is blocked, and what needs to be reassigned. Mid-point review at the halfway date. Final assessment at the deadline.

How to Customise This Template

Step 1: Replace the example goal

Each section comes pre-filled with an example. Replace the example goal with your own SMART goal: Specific, Measurable, Achievable, Relevant, Time-bound.

Step 2: Edit the task table

Delete the example rows and enter your own tasks. Each task should be completable in 1 to 14 days. If a task takes longer, split it into sub-tasks.

Step 3: Assign owners

Every task must have exactly one owner. Not a team. Not a department. One name. The owner does not need to complete the task alone but is responsible for it being done.

Step 4: Set deadlines with buffer

Add 2 to 3 business days of buffer to every deadline to account for interruptions, approvals, and unexpected blockers.

Step 5: Schedule weekly reviews

Plans without weekly reviews die within two weeks. Schedule a 15-minute weekly check-in and treat it as non-negotiable.

Free to use for personal and commercial purposes. No attribution required. ActionPlanTemplate.com is operated by Digital Signet.