

Guideline for Writing an Operational Plan

Having an Operational Plan and Why it is Important?

An operational plan is a blueprint that sets out the tasks that a business needs to perform to reach specific outcomes. By utilising an operational plan, it is like a roadmap that defines clear and common directions to help your business succeed.

It is extremely detailed plan and clearly outlines your business's current performance while implementing goals, strategies, objectives, procedures, a timeline and that you need to succeed to reach a certain outcome.

When preparing your operations plan you should be able to answer questions like:

- Who – which personnel or department need to oversee the completing specific tasks?
- What – a description of what tasks are involved and who are responsible.
- Where – information on requirements or performance indicators.
- When – deadlines for when tasks and goals are to be completed.
- How much – budget - the costs involved to complete tasks.

In addition, Communication throughout the whole process is extremely important plus always have a backup plan, a “what if” in case circumstances change.

How to create an operational plan?

What steps to follow:

1. **Title**, Operational Plan, company name, company address, Subject, Names of People/Departments involved, date, created by (Person who created the document).
2. **Executive Summary**, Describes the overall plan in a few sentences.
3. **Strategic Context**, describes the company's mission, vision, reasons for the plan, changes in competitive analysis, funds etc.
4. **Company Objectives**, what is the company trying to accomplish over the next year? What are the major goals and milestones that support this operational plan?
5. **Key Performance indicators**, provide proof of the importance of the operational plan by sharing figures that support the ideas in the plan.

6. **Financial Summary**, an overview of the financial breakdown and projects during this plan, eg costs for suppliers, staff, equipment etc. Ensure there is enough capital to execute the plan.
7. **Responsibilities**, allocation of team members who will be responsible for tasks.
8. **Key assumptions and risks**, a SWOT analysis.
9. **Goals**, what Key Performance Indicators (KPIs) will be improved because of this operational plan.
10. **Timeframe**, includes milestones, approval processes, updates, reporting, task completions etc.