

Work with clients to develop an action plan for implementation

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**Overview**

This standard is about working with clients to develop an action plan for implementation. It is aimed at people who provide advice and guidance to clients who use services such as public services, education and training, health services and those provided by welfare professionals and others.

The standard looks at developing plans by identifying and prioritising the key objectives and stages of action, incorporating chosen actions into action plans and identifying any further actions required.

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## Performance criteria

You must be able to:

1. discuss content of action plans with clients in ways that meet their needs
2. discuss with clients any difficulties in achieving action plans in ways that meet their needs
3. identify methods for implementing courses of action in line with organisational requirements
4. provide rationale to clients or those to whom you report for any significant changes to action plans in line with organisational requirements
5. identify with clients any actions that cannot be met through action plans
6. establish alternative actions to deal with requirements that cannot be met through action plans
7. agree the implementation of action plans with clients
8. check action plans specify methods, timescales and responsibilities for delivering clients' requirements
9. confirm with clients that action plans can be implemented in line with their needs
10. produce action plans in agreed format with required information
11. agree with clients the process for reviewing the implementation of action plans
12. review the content of action plans with clients in ways that meet their needs
13. prioritise the key objectives and stages of action plans with clients in ways that meet their needs
14. comply with all relevant legal, professional and organisational requirements and guidelines when preparing clients for the implementation of courses of action
15. record action plans in line with organisational requirements

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## Knowledge and understanding

You need to know and understand:

1. the importance of complying with relevant legal, professional and organisational requirements and guidelines
2. legislation, codes of practice, organisational policies and procedures in relation to job role/activities undertaken
3. different methods of communication and how to adapt them to suit the needs and preferences of the clients
4. why it is important to discuss any difficulties with clients in achieving action plans
5. why it is important to confirm courses of action with clients
6. what is involved in different types of activity and the potential advantages and disadvantages of activities
7. the responsibilities of different services and people
8. the range of services and support available and how to access them
9. difficulties in achieving the requirements of clients' stages and timescales of different activities
10. costs to all relevant parties
11. how each stage contributes to the overall activity
12. types of information used during different courses of action
13. expectations that might be proposed and how to ensure they are realistic and achievable
14. additional information that might be required by different clients
15. how to obtain information on the requirements
16. what the methods, timescales and responsibilities are for delivering different requirements and how to incorporate them into action plans
17. how to check the feasibility of action plans and factors that might affect this
18. different formats for action plans
19. types of supporting documentation that might be required with action plans
20. why it is important to review action plans with clients, how often should they be reviewed and what type of review should take place
21. why it is important to confirm clients' decisions on courses of action and how to do this
22. the potential difficulties of different courses of action and how to overcome them
23. the methods for implementing different courses of action and why it is important to agree these with clients
24. types of changes that might need to be made to action plans
25. why it is important to provide rationale for any changes to action plans and any other actions that could be taken

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26. alternative actions that might be taken to deal with requirements that cannot be met through action plans
27. why it is important to reach agreement for the implementation to commence and how to confirm understanding of this by clients
28. recording requirements of your organisation, including how to store recorded information securely

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**Suite** Advice and Guidance

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