The Brief Action Planning Guide
(25 Jul 2012)
A Self-Management Support Tool for Chronic Conditions, Health and Wellness

Brief Action Planning is structured around 3 core questions, below. Depending on the response, other follow-up questions may be asked. If at any point in the interview, it looks like it may not be possible to create an action plan, offer a return to it in a future interaction. Follow-up is addressed on page 2. Question #1 of Brief Action Planning can be introduced in any clinical interaction when rapport is good.

1. **Ask Question #1 to elicit ideas for change.**
   “Is there anything you would like to do for your health in the next week or two?
   a) If an idea is shared, specify details as they apply to the plan (Help the person make the plan SMART – Specific, Measurable, Achievable, Relevant and Timed).
      “What?”
      “When?” (time of day, day of week, start date)
      “How much/long?”
      “How often?”
      “Where?”
   b) For individuals who want or need suggestions, offer a behavioral menu.
      I. First ask permission to share ideas.
         “Would you like me to share ideas that other I’ve worked with have tried?”
      II. Then share two to three ideas.
          “Some people I have worked with have______, others have had success with_____ or ____.”
      III. Then ask what they want to do.
          “Do any of these ideas work for you, or is there something else I haven’t mentioned that you would like to try?”
      IV. If an idea is chosen, specify the details in order to make the plan SMART (above).
   c) After the individual has made a specific plan, elicit a commitment statement.
      “Just to make sure we both understand the details of your plan, would you mind putting it together and saying it out loud?”

2. **Ask Question #2 to evaluate confidence.**
   “I wonder how confident you feel about carrying out your plan. Considering a scale of 0 to 10, where “0” means you are not at all confident and “10” means you are very confident, about how confident do you feel your plan?”
   The word “sure” may be substituted for the word “confident”.
   a) If confidence level >7, go to Question #3 below. “That’s great. It sounds like a good plan for you.”
   b) If confidence is level<7, problem solve to overcome barriers or adjust plan.
      “5 is great. That’s a lot higher than 0, and shows a lot of Interest and commitment. We know that when confidence is a 7 or more, people are more likely to be successful. Do you have any ideas about what might raise your confidence?”
c) If they do not have any ideas to modify the plan, ask if they would like suggestions.  
   “Would you like to hear some ideas from other people I’ve worked with?”

d) If the response is, “yes” provide two or three ideas.  
   “Sometimes people cut back on their plan, change their plan, or make a new plan. Do you think any of these might work for you or something else you’ve thought of?”

e) If the plan is altered, repeat Questions #2 to evaluate confidence with the new plan.

3. Ask Questions #3 to arrange follow-up or accountability.  
   “Sounds like a plan that’s going to work for you. Would you like to set a specific time to check back in with me so we can review how things have been going with the plan?”
   Make the follow-up plan SMART.

Follow-Up for Brief Action Planning

a) First ask, “How did it go with your plan?”
   a) If successful recognize (affirm) their success.
   b) If partially successful, recognize (affirm) partial success.
   c) If little or no success, say, “This is something that is quite common when people try something new.”

b) Then ask, “What would you like to do next?”
   a) If the person wants to make a new plan, follow the steps on page 1. Use problem solving and a behavioral menu when needed.
   b) They may want to talk about what they learned from their action plan. Reinforce learning and adapting the plan.
   c) If the person does not want to make another action plan at this time, offer to return to action planning in the future.

The Spirit of Motivational Interviewing

Then Spirit of Motivational Interviewing underlies Brief Action Planning.
   2. Acceptance: Respect autonomy and the right to change or not change.
   3. Evocation: Ideas come from the person, not the clinician or helper.
   4. Compassion: Act with heart when providing assistance.