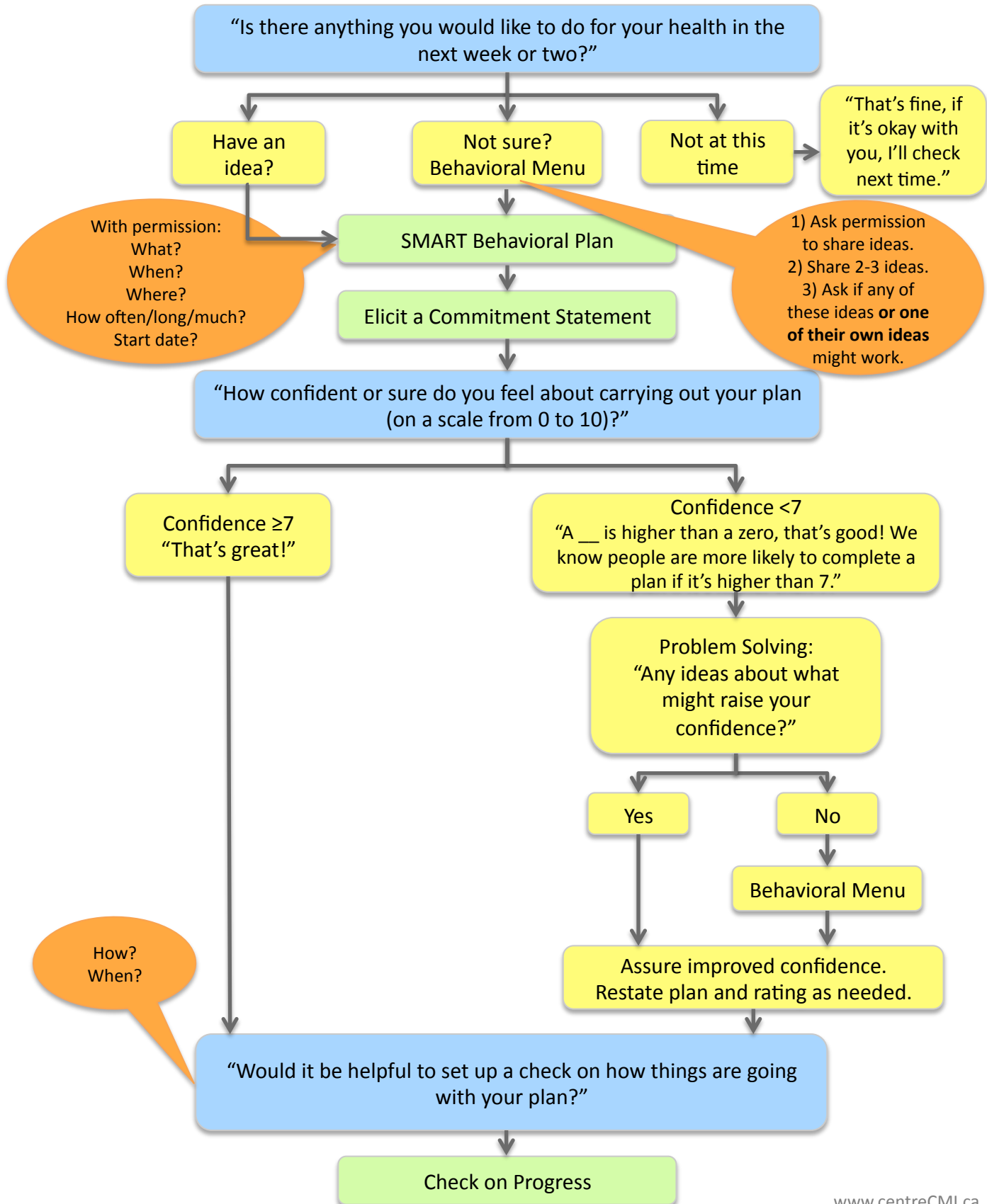
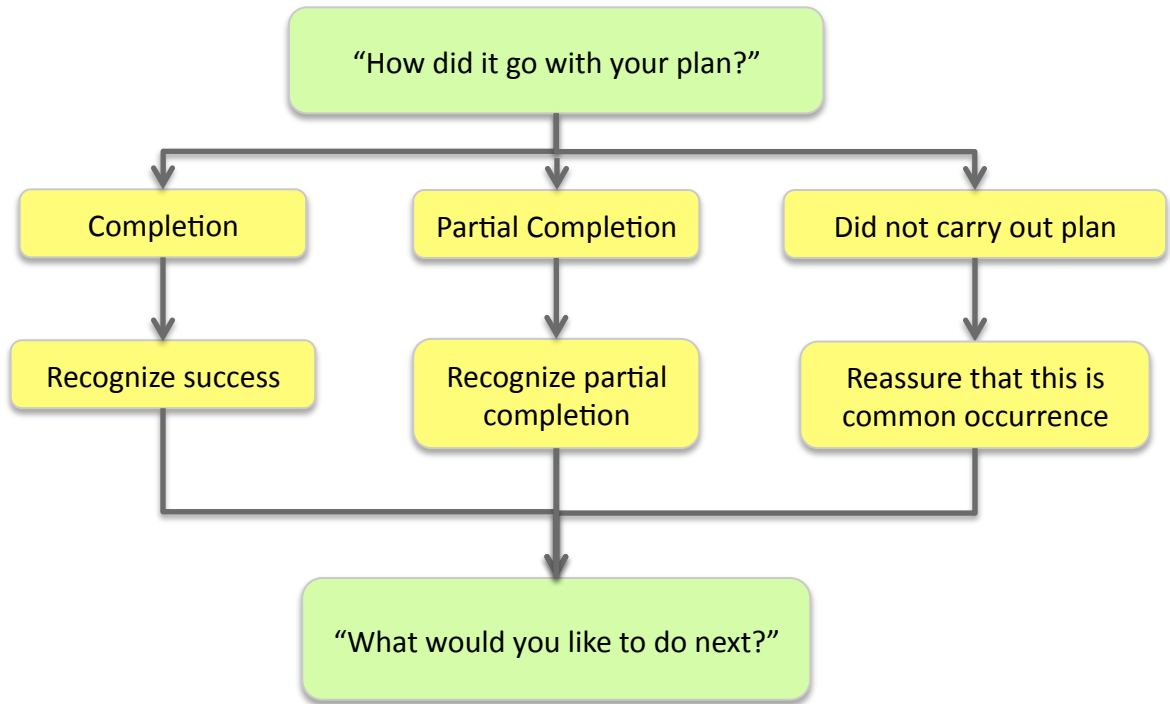


# Brief Action Planning Flow Chart

Developed by Steven Cole, Damara Gutnick,  
Connie Davis, Kathy Reims



## Checking on the Brief Action Plan



The Spirit of Motivational Interviewing is the foundation of Brief Action Planning

**Compassion**

**Acceptance**

**Partnership**

**Evocation**

Miller W, Rollnick S. Motivational Interviewing:  
Preparing People for Change, 3ed. 2013.

# The Brief Action Planning Guide

1 Mar 2014

## 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 to return to it in a future interaction. Checking on the plan is addressed on page 2. Question #1 of Brief Action Planning is introduced in clinical interactions after rapport has been established.

1. Ask Question #1 to elicit ideas for change. "Situation" may be substituted when appropriate.  
**"Is there anything you would like to do for your health in the next week or two?"**
  - a. If an idea is shared and permission received, specify details as they apply to the plan. (Help the person make the plan SMART - Specific, Measurable, Achievable, Relevant and Timed).  
**"Many people find it useful to get very specific about their plan. Would that work for you?"**  
With permission, proceed.  
**"What?"** (type of activity)  
**"When?"** (time of day, day of week)  
**"Where?"**  
**"How often/long/much?"** (often: once, three times, five times; long: minutes, days; much: servings, meals)  
**"When would you like to start?"**
  - 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 some ideas that others I've worked with have tried?"**
    - ii. Then share two to three ideas ALL AT ONCE. The ideas are not too specific, relevant to their goal and varied.  
**"Some people I have worked with have \_\_\_\_\_, others have had success with \_\_\_\_\_ or \_\_\_\_\_."**
    - iii. The last idea is always one of their own. Then ask what they want to do.  
**"Do any of these ideas work for you, or is there an idea of your own that you would like to try?"**
    - iv. If an idea is chosen, specify the details in order to make the plan SMART (1a 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. The word "sure" is a synonym for the word "confident."  
**"I wonder how sure you feel about carrying out your plan. Considering a scale of 0 to 10, where '0' means you are not at all sure and '10' means you are very confident or very sure, how sure are you about completing your plan?"**
  - a. If confidence level  $\geq 7$ , go to Question #3 below. **"That's great. It sounds like a good plan for you."**
  - b. If confidence level  $< 7$ , problem solve to overcome barriers or adjust plan. Explain the reason to boost confidence.  
**"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 complete their plan. Do you have any ideas about what might raise your confidence to a 7 or more?"**
  - 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 (behavioral menu). Often the following menu applies:  
**"Sometimes people cut back on their plan, change their plan, make a new plan or decide not to make a plan. Do you think any of these work for you or is there an idea of your own?"**
  - e. If the plan is altered, repeat step 1c and Question #2 as needed to evaluate confidence with the new plan.
3. Ask Question #3 to arrange follow-up or accountability.  
**"Would it be useful to set up a check on how it is going with your plan?"**  
If they want to check, make the follow-up plan specific as to day, time and method (with themselves, with another via phone, email, in person, etc.)

## Checking on Brief Action Planning

1. First ask, ***“How did it go with your plan?”***
  - a. If they completed their plan, recognize (affirm) their success.
  - b. If the plan was partially completed, recognize (affirm) partial completion.
  - c. If they did not try to do their plan, say, ***“This is something that is quite common when people try something new.”***
2. 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

The Spirit of Motivational Interviewing underlies Brief Action Planning.

1. Compassion: Actively promote the other’s welfare.
2. Acceptance: Respect autonomy and the right to change or not change.
3. Partnership: Work in collaboration.
4. Evocation: Ideas come from the person, not the clinician or helper.



*This tool was developed by Steven Cole, Damara Gutnick, Kathy Reims and Connie Davis.*