ActionPlanner SOLO Quick Start

1. Log into your ActionPlanner account

- Go to https://solo.actionplanner.com and login with your email and password (the one you selected when you logged in for the first time)
- If you cannot remember your password, you can always click the pink "Forgot my password" link to reset your password from the https://solo.actionplanner.com login page

2. Building your Roadmap

Click on the pink "PLUS" button to start building your Roadmap.
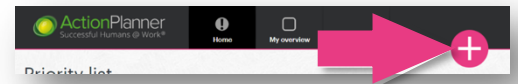
1. Start by creating your Objectives. Objectives are high-level goals or areas of focus for the coming period. You can also think about Objectives like folders on your PC. Create a few Objectives to get started.

2. Continue by creating Initiatives. Initiatives align to an objective like documents align to folders on your PC. Initiatives can contain milestones like documents contain sections. Milestones can help you understand what deliverables or steps you need to go through in order to progress with the initiative. Consider inviting GUESTs into your Initiatives – it's FREE and it can be both internal and external guests.

3. Give feedback to the initiatives and milestones. Reporting is done via feedbacks using the RAG (Red, Amber, Green) or traffic light reporting methodology with a few comments to clarify. We recommend giving feedback to all your initiatives and relevant milestones every Friday before end of work.

3. ActionPlanner terminology

OBJECTIVES

Objectives are the highest level in the activity tree structure and a relevant way of grouping initiatives. It's easy to move initiatives to other objectives. Pro tip: You can actually give RAG feedback to Objectives if you wish.

INITIATIVES

Initiatives are characterized by:
1. An activity which takes up 5-10% of your workload over several months
2. Having the ability to give feedback with colors, comments and KPI's
3. Having a start date and end date
4. Providing the ability to contain milestones and actions

An initiative can be broken down into one or more sub-initiatives as needed. The functionality of a sub-initiative is the same as for an initiative.

MILESTONES

Milestones are characterized by:
1. An activity, less complex than an initiative, which runs for 1-2 months
2. Having the ability to give feedback with colors and comments
3. Only having an end date
4. Providing the ability to contain actions
5. If a milestone in itself contains several milestones, it should be created as an initiative instead

ACTIONS

Actions are characterized by:
1. A simple activity which can be completed in 5-10 minutes
2. Only having the ability to be marked complete. If you need to follow the action with color (red, yellow, green), it should be created as a milestone instead
3. Having the option to add an end date if needed
4. If an action in itself contains several actions, it should be created as a milestone instead