Action planning guide

Develop health care goals collaboratively with patients

An action plan is created with a patient to help him or her meet the goal of achieving better health. Whether the health goal is initially set by the provider, the coach or the patient, the patient needs to agree on it. Without the patient’s engagement, the chance of meeting the goal is very small. An action plan is an agreement between the patient and the provider or coach specifying a behavior change *the patient* wants to make.

Follow these six steps to create a collaborative action plan:

1. Allow the patient to choose one general domain of behavior change (e.g., eating, exercise or taking medications)
2. Discuss a very specific action plan that the patient wants to take (e.g., walk for 20 minutes three days per week)
3. Check the patient’s confidence that they’ll be successful with their chosen action plan (e.g., a rating of 7 to 10 on a scale from 1 to 10)
4. Ask when the patient wants to start the plan (e.g., this weekend or the first of the month)
5. Arrange a follow-up phone call to check on the patient and support them in addressing any challenges with sticking to their plan
6. Close the loop during the visit to confirm that the patient knows the action plan

**Sample action plan dialogue**

The script below is an example of an action planning conversation between the coach and the patient. Note that the coach follows all six of the steps outlined above.

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| Coach | Hello, how are you today? I am Jessica, your health coach. |
| Senora (Sra.) Romero | I’m okay, thank you. My doctor told me that my diabetes is getting worse. My A1C is 10 and I want it to be seven. |
| Coach | Do you know how to bring down your A1C? |
| Sra. Romero | I need to eat better, be more active and take my pills. |
| Coach | That is right. Do you want to work on any of those things? |
| Sra. Romero | I think what I eat or drink may not be good for my A1C. I need to work on that. |
| Coach | Is there anything you eat or drink that might make your A1C go up? |
| Sra. Romero | I drink too many sodas. I drink about four sodas a day. I think it’s the sodas. |
| Coach | Would you like to do something about how much soda you’re drinking? |
| Sra. Romero | I’ll never drink sodas again. I’m through with sodas.  |
| Coach | I’m glad you want to get your A1C down, but let’s make the plan realistic so you can accomplish it. How sure are you that you can stop drinking soda altogether? Let's use a “0 to 10” scale: “0” means you aren't sure you can succeed and “10” means you are very sure you can succeed.  |
| Sra. Romero | Oh, it would be really hard for me to do it. It’s 2 out of 10. |
| Coach | We want you to succeed. What would make you more likely to succeed? |
| Sra. Romero | Maybe going from four sodas a day to two a day. That is 10 out of 10. |
| Coach | Great. Can we call this your action plan? |
| Sra. Romero | Sure! I’ve wanted to cut down on the sodas for a while now. |
| Coach | That is great. When do you want to start? |
| Sra. Romero | Tonight with dinner is good. |
| Coach | Excellent. Could I call you in a few days to see how it’s going? |
| Sra. Romero | Sure. Please call after I get home from work at night. |
| Coach | I will do that. Just to be sure we are clear on your action plan, what will you be doing to get your A1C down? |
| Sra. Romero | Cut down my sodas from four a day to two a day, starting with dinner tonight. |
| Coach | Sounds great. I’ll give you a call in two days to see how it’s going. Thank you for your time today, Senora Romero. |

*Source: AMA. Practice transformation series: health coaching. 2016.*