



Action Planning Materials

The creation of your Action Plan is a critical requirement to ensure the success of the survey. The following guidelines will assist in facilitating meaningful discussions with positive outcomes.

Step One: Advance Planning

(Page #51, How One Leader Can Make a Difference)

Prior to bringing your employees together to review your team's results and begin action planning, advance preparation is critical. First, determine the meeting time and place. Ensure that the time of day, the meeting location, and the actual meeting room are conducive to brainstorming, problem solving and facilitating a group discussion. Consider the size of the room in relation to the number of participants. Generally speaking, for problem solving type meetings, the participants should be seated around a table or tables, facing one another. Avoid a classroom or theater type setup, as these arrangements are not conducive to free flowing dialogue between participants. Ensure that all support materials, such as laptops, LCD projectors, flip charts, marking pens, etc. will be available.

In advance, copy and distribute your team's specific data and the overall, organization-wide data. Distributing the material prior to the meeting allows employees time to process the information and begin thinking about possible actions to address some of the lower rated areas.

The following checklist will help you prepare for your action planning meeting:

Action	Completed
Data spread sheets showing team specific data given to employees prior to meeting	
Meeting room reserved	
Meeting time and location communicated to team members	
Room arranged so that people are facing one another and will be comfortable	
Required materials available to include laptop, LCD projector, white board, flipcharts, tape, markers, pens, etc.	
Designate someone to take notes during the meeting	

The following are some general guidelines for conducting an Action Planning meeting:

- At the start of the meeting, begin by thanking your team for participating in the survey. Review with your team the highest and lowest rated questions for your department. Make it clear to your team that you are proud of the department's highest rated areas and that you are committed to putting together an action plan to raise some of the lower rated areas. When discussing results with your team, it is important to ask for suggestions or ideas of what could be done to make the department an even better place to work.
- Encourage team members who do not feel comfortable voicing their concerns to write down their ideas or to meet one-on-one with a management team member with whom they feel comfortable with. Emphasize that you value their feedback.
- Please note that ***conducting a witch hunt is unacceptable***. *Do not* ask questions such as: What do I do that makes you not trust me? Why do you not trust our management team? Who does not agree with this question? Asking these types of questions *will* result in your team losing respect for you, losing trust in you, and last, your team will be hesitant to speak openly and honestly in your presence.

Step Two: Identify Areas of Strength

(Page #52, *How One Leader Can Make a Difference*)

Our Team Strengths:

When you review the data for our team, what are the areas that you feel positive and/or good about?

- 1.
- 2.
- 3.
- 4.
- 5.

Step Three: Identify Reason for Success

(Page #54, How One Leader Can Make a Difference)

The Reasons for Our Success:

The reasons we have been successful in the areas listed as our strengths are:

- 1.
- 2.
- 3.
- 4.
- 5.

Step Four: Identify Individual Areas of Concern

(Page #55, How One Leader Can Make a Difference)

My Individual Concerns:

When you review the data for our team, what are the most important areas where you feel, if addressed and actions taken, would make our team even stronger or a better place to work?

- 1.
- 2.
- 3.

Step Five: Achieve Consensus on Common Areas of Concern

(Page #55, *How One Leader Can Make a Difference*)

Group Consensus Regarding Concerns:

Based on the survey results for our team, the top three areas where the team feels we need to “turn up the volume” and take action are:

1.

2.

3.

Step Six: Begin the Action Planning Process

(Page #56, *How One Leader Can Make a Difference*)

The action planning worksheets on the following pages will help you keep the group focused on developing actions to address the agreed upon areas of concern. A more extensive list of action plans for each category can be found in the book, *How One Leader Can Make a Difference*, starting on page #65.

Remember to submit your department action plan to your manager within 60 days of receiving the survey data. Review the action plan with your manager and ask him/her if they have any additional ideas that may be helpful to you as a leader.

Note: If you do not have any ideas of what to do to improve employee opinions on a certain question, please feel free to call Peter Stark or Jane Flaherty at 858.451.3601. They will be happy to recommend ways to address different types of problems.

Action Planning Worksheet

Area # 1

Area for Improvement

Area:

What question(s) in the survey are related to this area?

Identify the reason(s) this area(s) / these questions may have scored low:

Identify what actions the manager or employees can take to improve this specific area of the survey.

Employees

Manager

Review the above actions to ensure they meet the SMART test.

S = Specific

M = Measurable

A = Attainable

R = Realistic

T = Timely