

2008 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	
Food and beverages arranged, if provided	

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 Reasons 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. This template can also be found on our website: www.employeeopinionsurveys.com/demos.htm. An 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.

Action Planning Worksheet

Area # ____

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