



Your Step-by-Step Guide to Executing Action Plans Successfully



Action planning

When conducting an employee survey, it is important to follow through on promises. Action planning becomes the pivotal third step in this process (Figure 1).

When prioritised and implemented correctly, action planning is a highly effective way of examining your feedback in greater detail to leverage your employees' voices and identify improvement areas. This guide will explore three strategies to maximise employee buy-in and a step-by-step guide to action planning post-employee survey.



Figure 1.

Three strategies to maximise employee buy-in

Numerous studies confirm that involving employees in decision-making processes, including action planning and execution, significantly boosts engagement.

To ensure that the team's enthusiasm is harnessed, Insync recommends that action be undertaken as soon as possible following the reporting of survey outcomes. There are often three significant activators to successful action planning:

- 1. Ensure that there are sufficient dedicated resources – this vastly improves the chance of success.**
- 2. Hold stakeholders to account by bringing them into the action planning process.**
- 3. Address competing priorities to ensure there is sustained focus.**

Step-by-step guide to successfully executing action plans



We've developed a recommended next step checklist to help you frame your next steps in this journey following an action planning team discussion or workshop.

Week 1 – Share report

- Share the outcomes of your discussion or workshop in its entirety with the team – this is their work.
- Meet with those team members who could not attend the workshop to brief them on what was discussed and to give them an opportunity to contribute their ideas or insights.
- If needed, update and reshare the report.

Week 2-3 – Discuss the feedback

- Organise a session to bring the team back together to ask questions and to better understand the preferred actions (where that might be required), what needs to be done, and who will be responsible (the project lead or sponsor).
- Talk to the group about the other actions (not just the few preferred) that you and the group believe have merit. Sometimes some real 'gems' can get lost because, in the moment, they were not the most popular ideas.
- Identify the 'quick wins' that are immediately actionable and be prepared to talk about these with your team – they need to see some early and meaningful progress.
- Provide timing on when the quick wins and strategic priorities are achievable, a good rule of thumb is quick wins take approximately six months to action and strategic priorities, approximately 18 months.
- Aim to conclude the meeting with clearly defined accountability from the group. Where the actions can be delivered by team members themselves, they should be allocated within the team. This helps to create a mindset shift of 'what can we do for ourselves', rather than 'what can be done for us'.

Week 5-6 – Seek feedback and finalise action plans

- Finalise and circulate the complete action plans ensuring that they include timelines/schedule, and allocated resources (budget, if required, team members and tools).
- Each action plan 'owner' should seek feedback and input from their required stakeholders to ensure that they are brought into the process and being held to account.

Step-by-step guide to successfully executing action plans



Every month – Checking in and implementation

- Check in on the progress of the action plans regularly, both formally and informally. For example, look for the opportunity for informal 'watercooler conversations' to check in on how people are progressing; add 'action plans' as a standing agenda item at team meetings or set up monthly updates from action sponsors.
- Remove obstacles where you can. Ensure there are sufficient resources available and adequate time to deliver outcomes. Be prepared to be flexible when there are unexpected changes.
- Unfortunately, resources are not limited. Be very clear and transparent about what is in scope what is out-of-scope and what is negotiable and what is non-negotiable. People need to know the parameters that they need to work in as they start to plan.
- Things change, that's part of life – we suggest the action plans are regularly revisited and updated to ensure their continuing relevance and effectiveness. It's okay to adjust plans as needed based on feedback and changing circumstances (make sure you keep the team updated!).

As needed – Celebrate and evaluate

- It's important to celebrate the wins – acknowledge and celebrate milestones and successes.
- Make sure you document the process, lessons learned throughout the process and areas for improvement – these insights can be used to improve future action plans.
- Share your successes widely! It's a great way to recognise the progress of your team. What are the opportunities available to you to share the story of the journey and outcomes with wider stakeholders and across the organisation?

Get started

In essence, action planning is the pivotal bridge that transforms employee feedback into tangible organisational improvements, solidifying the commitment to listen and act upon employees' valuable insights.

We're here to ease any stress you may feel about the action planning process. Get in touch with our friendly team today with dedicated support and guidance tailored to your needs.