action planning
its what you do with it that counts

- Organisations that provide feedback and take action score substantially higher on employee engagement (36% higher employee engagement; showing correlations .45 to .50)
- Acting upon survey results won’t cause an immediate 36% improvement, but cultures that act on survey results show far higher engagement
6 step action plan

1. Feedback Results
2. Understand Issues
3. Prioritise Issues
4. Plan Actions
5. Implement & Monitor
6. Communicate Actions
1. feedback results

• Transparent communication, through multiple channels, of highs and lows from the quantitative results (eg, statistics) and qualitative results (eg, text responses) to all staff, within 3 months of survey close.

• Involve as much face-to-face communication from senior execs as possible.

• HR can coordinate and possibly facilitate, but should minimise the role they play in communicating results, planning actions and implement change.

• Open forums involving all staff, or if restricted audience then at least communicate process and decisions to all staff.

• Cascade in a top-down manner so that each level management has time to understand and absorb results, and can facilitate feedback at the lower levels.

• Provide a process and templates to teams for action planning.
top-down reports & upward feedback

From Borg & Zimmerman (2006)

Senior Management

- Interprets results for organisation
- Defines areas of focus, boundaries of action
- Decides on responses, actions
- Discusses results with direct reports
- Controls progress
- Adjusts plans, actions

Managers

- Interprets results of team
- Plan responses for self, team
- Reports action plans
- Escalates nonsolvable problems
- Implements actions plans, reports

Team leaders and employees

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2. understand issues

- It is the two-way conversation between management and staff about how to improve the workplace that is one of the most valuable components of conducting a survey.

- Spend some time identifying and celebrating the positive results.

- Dig deep for underlying root causes – solutions will only be effective if they are targeted at the real problem, not superficial issues. Keep asking ‘why’ this problem exists, and then ‘why’ again.

- This stage should be characterised by managers doing most of the listening and asking questions, with lower level staff doing most of the talking.

- Sometimes issues are too sensitive for staff to discuss in front of managers. In these cases it may be helpful for a third party (eg, HR or a consultant) to run focus groups.
3. prioritise issues

• Start by reviewing the overarching mission, vision and values.
• Brainstorm a large number of issues highlighted by the survey results, possibly using a SWOT matrix, avoiding evaluation.
• Be as specific as possible about the issue, to maximise understanding and agreement.
• Use a process such as voting or a decision matrix (eg, risk/impact/alignment vs effort/resources/investment) to identify priorities for action.
• For each “unit” (eg, whole organisation, or payroll team), develop a list of “quick wins” (eg, issues easily or quickly solved), and focus on only 1 to 3 “big wins” (eg, issues that will involve substantial resources and planning).
• Don’t forget to consider how to leverage strengths and capitalise on opportunities.
4. plan actions

• For each priority, the most important initial step for planning is to allocate . . .
  • A single point of responsibility for the priority (who), and
  • A time at which the action plan will be completed
• If time and knowledge allows in the initial planning session you can also start filling in the rest of the action plan:
  • Specific measurable deliverable to be achieved (what)
  • Why it’s important and aligned with mission, values and strategy (why)
  • Tasks and resources required (how)
  • Where might there be resistance, conflict or risk (where)
  • Deadline for completion (when)
• In most cases, detailed project management methodology (eg, Gantt charts, project management software) isn’t needed.
5. implement & monitor

• Senior management must set a clear expectation that plans must be developed, resourced, implemented and regularly reported to back senior management (not just HR).

• Set specific timeframes for reporting progress against plans to senior management.

• Include a metric such as “% completion” that can be used as a rough indicator of progress; but recognise that progress is rarely linear and that projects often sit at 90% completion for a long time!

• There must be a consequence for not reporting or not making sufficient progress against plans (eg, a “chat” with a senior manager, and components of the appraisal process should assess each individual’s successful change management).

• In the next survey, ask staff whether they received feedback about results from the last survey and saw actions taken.
6. communicate actions

- Regular communications linking change and improvements (small and large) to the survey initiative will enhance the credibility of and commitment to the survey process.

- Establish regular channels for downward or horizontal communication of summarised actions to other departments and/or the whole organisation.

- Link actions back to the feedback from staff received through the survey (e.g., “You said X so we’ve done Y”).
example results workshop

1. Presentation of whole-of organisation Voice Results
   • Interpreting work area Voice Results
2. Group activity – work area results
   • List strengths / opportunities for improvement
   • Choose priority areas
3. Identify and explore priority areas
   • defining issues
   • exploring causes
   • brainstorming solutions

Great Resource:
Wood, Cogin & Beckman (2009)
Managerial Problem Solving: Frameworks, Tools, Techniques.
**explore area results**

- What are the 5 highest scoring areas (%Fav)? Look at the items making up these scales. What is being done well to encourage these strengths?

- What are the 5 lowest scoring areas (%Fav)? Look at the items making up these scales. Why do you think these have been identified as weaker areas?

- How do these fit with the open-ended comments?

- How similar are your results to the overall organisation results? What are the key areas of difference?

- Which areas have the highest impact on staff Passion?

- Which areas have the highest impact on Progress (staff perceptions of how well the organisation is doing)?

- Which areas do you think it will be most important to focus on?
next steps

- Identify full list of strengths / opportunities for improvement
- Choose areas of highest priority
- Cafe conversations – defining issues, exploring causes and brainstorming solutions
choose 3 priority areas

Consider:

• extremity of results (absolute or relative)
• changes since survey
• your level of control / contribution
• synergies – can you kill two birds with one stone?
• impact on achievement of purpose and values (integrity & alignment issues)
• impact on passion and progress
cafe conversations

• 3 issue leaders/facilitators;
  • Take notes
  • Brief each group
  • Write up / report back
• Everybody contributes to conversations on all 3 issues
  • defining issue
  • exploring causes
  • brainstorming solutions
define issue

• What is the problem here? What are the consequences?
• The ideal situation: what would this look like if done well?
  • List some concrete positive examples.
• The current situation: what is the problem?
  • List some examples
• Review item wording & text comments
explore causes

- Brainstorm possible causes and barriers (values, processes, systems, structure, resources, people, environment)
- Drill down – ask **why** and **why** again!
- Mind map / fishbone diagram
- What questions do we need to ask to understand this better?
brainstorming solutions

• What are potential solutions? What strengths can we draw on?
• Brainstorming;
  • No judgements or evaluations
  • All ideas welcome – no matter how absurd or impractical
  • Quantity
  • Combine and build on ideas of others