

Action Planning

Action Planning About Engagement:

- 1 Analyze the Gallup Q12[®] survey, pulse survey or other survey results.
- 2 Select one of the key results or concepts that you would like your team to work on from your Q12[®] survey, pulse survey or other survey results.
- 3 Review and adjust.

Instructions: Use the below example as a guide to fill out this action planning tool.

EXAMPLE

What is our team going to work on? What are we trying to do differently or enhance?

We want to bring more clarity (who does what) to improve work efficiency, quality and enjoyment.

What will success look like? What improvements will we see with goals, metrics or team effectiveness?

Our productivity numbers will increase, and our team relationships will become stronger as everyone will have more clarity about who does what.

Which engagement item(s) will this work affect? *(Skip this step if action planning about CliftonStrengths[®].)*

Q01. I know what is expected of me at work scores and Q03. At work, I have the opportunity to do what I do best every day will increase.

What immediate actions will we take?

ACTION

OWNER

Ella will host a 10-minute connect first thing on Monday, Wednesday and Friday, where she will update us on any changing priorities, communicate about our progress and assign specific work to specific individuals.

Ella

Gabriel will create a spreadsheet of deliverables and deadlines from the session each week and post it on the work chat so all team members know who is working on what.

Gabriel

Is your action plan **SMART**?

- S**pecific
- M**easurable
- A**ctionable
- R**ealistic
- T**imely

When will we review and adjust our plans? How often?

We will reevaluate this plan in 60 days to see if we have made progress or reexamine our plan.

Action Planning Tool

What is our team going to work on? What are we trying to do differently or enhance?

What will success look like? What improvements will we see with goals, metrics or team effectiveness?

Which engagement item(s) will this work affect? *(Skip this step if action planning about CliftonStrengths.)*

What immediate actions will we take?

| ACTION | OWNER |
|--------|-------|
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(Optional) Is there anything we learned that we need to escalate to upper leadership? Who should handle the escalation?

When will we review and adjust our plans? How often? *(Gallup suggests a minimum of a review 3-4 times before the next administration.)*

Is your action plan **SMART**?

- Specific
- Measurable
- Actionable
- Realistic
- Timely

- What actions can top leaders take?
- How can we better equip top leaders to address our issue or concern?
- What are our best alternatives if the answer is no?