Post-survey action planning checklist

You've invested a lot into your engagement survey and the results are finally in.

You have all this valuable information — now what? While many of our clients successfully implement action plans, it is not uncommon to become overwhelmed by the data and get stuck on "what's next?"

To help get started, we've put together a list of questions to ask yourself which delve into the following essential elements of action planning:

- Making a Commitment to Act
- Creating an Action Accountability Plan
- Leveraging Tools and Technology
- Providing Training and Support
- Aligning Action Plans
- Tracking Key Action Milestones

While many of the following questions would have been answered at the beginning of your survey initiative, it's time to review and get ready to take action.

ACTION PLANNING, DEFINED BY TALENTMAP

Action planning is the most important step in the survey process. If you ask your employees for their opinion, it is important to act on what they tell you. Following the presentation of survey results, employees and management teams work towards generating, categorizing, and prioritizing high impact improvement ideas into an executive action plan based on a SMART (Specific, Measurable, Attainable, Realistic, Timely) model.

HAVING CONDUCTED THOUSANDS OF DIFFERENT SURVEYS IN EVERY TYPE OF ORGANIZATION ACROSS NORTH AMERICA, TALENTMAP OFFERS YOU THE INSIGHTS, CONTEXT, AND EXPERIENCES OF THOSE ORGANIZATIONS ALONGSIDE SOPHISTICATED POST-SURVEY SERVICES AND SUPPORT.

GETTING STARTED

☐ Are all executives on board?

☐ Does my organization understand that action planning is integral to the overall business strategy?

☐ Have I communicated survey results to employees? (If not, we recommend it.

MAKING A COMMITMENT TO ACT

☐ What are my overall survey objectives?

☐ Do my survey objectives match business goals and objectives?

☐ What support (equipment, money, or human resources) does the organization need to reach its goals?

☐ Do I forsee any obstacles that could inhibit action planning?

☐ Have I communicated the expectations of follow-up to employees?

☐ How will the organization keep momentum going?

CREATING AN ACTION ACCOUNTABILITY PLAN

☐ Have I set expectations by pre-defining the post-survey process and responsibilities?

☐ Who will monitor the organization's action plan progress?

☐ Who will be accountable for implementing action plans?

☐ What are the managers' post-survey role in the action planning stage?

☐ Have I clarified spheres of influence with managers?

☐ What role do employees play in analysis, feedback, action planning, and evaluation?

☐ Successful action planning requires effort from top to bottom. Have I involved everyone?

☐ Have I defined the size and scope of action planning efforts?

☐ Have I set realistic deadlines and timelines?

☐ What is the accountability mechanism for survey results and action planning?

☐ How will the organization know when it has reached its goal?

LEVERAGING TOOLS AND TECHNOLOGY

☐ Will I be leveraging an online reporting system?

☐ Will I be leveraging an online action planning tool to help managers develop SMART goals, specify how they intend to reach goals, and track their progress?

☐ Will I be leveraging a best practices library?

PROVIDING TRAINING AND SUPPORT

- ☐ Have I asked leaders and managers if they feel confident and ready to take action based on survey data?
- ☐ Do leaders and managers have or plan to develop the skills required to turn survey data into action?
- ☐ Will I provide training on survey analysis, feedback, and action planning for leaders and managers?
- ☐ Does my organization require meeting facilitation?
- ☐ Does my organization require individual coaching for leaders and managers who need help prioritizing opportunities, identifying solutions, and developing action plans?
- ☐ Would some leaders and managers benefit from mentoring?
- ☐ Would re-educating leaders and managers on the importance of survey action planning be beneficial to the overall post-survey process?
- ☐ Have I developed best practices lists and first-step recommendations to help managers start?

ALIGNING ACTION PLANS

- ☐ Is everyone from senior executives to front-line supervisors aligned and on the same page?
- ☐ Have I clarified corporate priorities?
- ☐ Have I aligned business unit priorities?
- ☐ Will I be using alignment tools to help leaders and managers share and collaborate on action plans?
- ☐ Have I scheduled regular action plan reviews where leaders and managers meet to discuss progress, share information, and identify issues that may be preventing action plan implementation?

TRACKING KEY ACTION MILESTONES

- ☐ What is the timeline for action planning?
- ☐ How do I plan to measure action planning efforts for managers?
- ☐ Have I established and communicated a clear process with key dates and milestones that provides a roadmap for leaders and managers to follow?
- ☐ Do I plan on conducting a brief pulse survey six months after the full survey to maintain awareness and measure the impact of action on employee attitudes?

Next up: Choosing the right action planning approach

Once you have covered the essentials of action planning, you're ready for the most important step in the action planning process: choosing the right action planning approach. No single approach is the "right" one for every situation. The choice depends on the CEO, the culture of your organization, and the business context.

TOP-DOWN

Top-down post-survey action planning originates from the perspective of senior leadership but encompasses participation from your entire organization. Action plans align with high-level strategic goals. Each level of the organization thereafter responds to the dribble-down from preceding management ranks, fine-tuning their own workgroup employee engagement action plans within the context of the broader organizational picture.

BOTTOM-UP

In the bottom-up approach, post-survey action planning originates from the front-lines or grassroots of your organization — where employees interact with customers. Plans are tailored to fit employee engagement touchpoints specific to each workgroup, department, and division, feeding across and up your organization.

STRATEGIC BREAKTHROUGH

The strategic breakthrough approach to post-survey action planning lies expressly with your organization's top leaders, usually when a significant organizational transformation is in the wings. A sophisticated analysis of employee survey data identifies critical strategies likely to yield the greatest employee engagement impact on performance. Strategic breakthrough action planning serves as the catalyst for change.
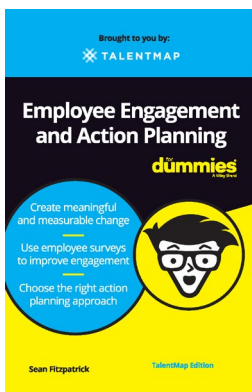
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