

Post-survey action planning: A guide for positive organizational change

About action planning

HR people find themselves spearheading efforts as change champions. This stewardship involves rallying the ranks, leaders and all, to make sure the entire employee population understands their roles and responsibilities in the post-survey process. It means showing employees their insights don't vanish into thin air but rather, make things happen visibly and measurably through post-survey action planning and implementation.

What Exactly Does Post-Survey Action Planning Look Like?

It's a series of steps, tasks, and processes that require effective coordination of people, politics, and resources. The strategic link between action and performance sits at the core from which everything else emanates. Though descriptions and methods may vary slightly from one environment to the next, it's a strategic, organization-wide step-by-step process – more monumental than the survey itself.

Including excerpts from [TalentMap's 2017 edition: Employee Engagement & Action Planning for Dummies](#), published by John Wiley & Sons Inc, this Post-Survey Action Planning Guide is presented in seven sections.

Part 1: The Pitfalls of Failing to Act on Post-Survey Results

The risks of post-survey silence.

Part 2: A Framework for Continuous Improvement

The do's and don'ts of successful action planning.

Part 3: How to Counter Opposition & Win Over Skeptics

Three common post-survey difficulties and recommendations to prepare for these obstacles.

Part 4: Tactics to Secure Buy-In Across the Organization

Choosing the right action planning approach based on your organization's corporate culture, leadership style, abilities of different managers, and more.

Part 5: The Role of Senior Leadership & People Managers

What's expected from your organization's leadership team.

Part 6: The Formula for Action Planning Success

Characteristics of successful action plans.

Part 7: Building a Continuous Learning Framework

How to integrate engagement into your organization's DNA.



Part 1: The pitfalls of failing to act

Organizations can say all kinds of things without uttering a single word. One of the most perilous is leadership's big silent hush following an employee survey. That quiet inaction can be a real killer.

The whole purpose behind surveying is to uncover information for future action planning. According to Jelke Bethlehem's discussion paper, *The Rise of Survey Sampling* (2009), earliest accounts of statistical gathering date back to ancient Babylonian times. You'd think, we'd have learned how to act on data by now. Unfortunately, that's not always the case.

Don't ask questions if your organization isn't ready to hear the answers. And definitely don't ask questions if your organization isn't prepared to make plans and take action.

Numerous employee engagement studies show a lack of survey follow-up is one of the biggest mistakes organizations make. Employees need to know their opinions matter and expect to see management act on survey results. Putting survey results on the back burner or disregarding them all together leaves employees stewing over why they even bothered. That deafening silence is organizational self-sabotage.





Part 2: A framework for continuous improvement

TalentMap recommends a cyclical continuous improvement framework for employee engagement vis-à-vis surveys, action plans, and implementation. It's about following basic steps: communicating results, focusing efforts on just a few priorities, working with employees to develop your action plan, implementing, and monitoring. If all is working as it should, in about 18 to 24 months it should be time to measure outcomes and repeat the process.

What are some of the do's and don'ts of successful action planning? What are some of the best practices?

Review Results

- Present survey findings to employees (all at once if possible or at the same time)

Listen and Deep Dive

- Establish an employee engagement steering committee
- Confirm and clarify survey findings using employee focus groups
- Explore issues behind the top six drivers of engagement across your organization

Solicit Employee-Driven Solution Development

- Focus on one to three of the most pressing engagement factors
- Stimulate creativity through a relaxed atmosphere and fun full-day action planning workshop facilitated by TalentMap

Document Your Action Plan

- Use S.M.A.R.T. objectives and realistic targets
 - Specific
 - Measurable
 - Achievable
 - Relevant
 - Timely
- Set accountabilities

DO NOT

- Try to isolate and/or target divisions with lower engagement
- Get caught up in paralysis by analysis



Part 3: How to counter opposition & win over skeptics

Surveying your employees is one thing. Acting on results is another.

The difficulty of post-survey action planning might come as a surprise. It takes a champion or three to make it happen. A good many champions of employee engagement have wrestled with some of the best oppositional managers. These naysayers are everywhere.

Getting management to roll up their sleeves post-survey may seem far more taxing than it was, on reflection, to sell your executive leadership team on the merits of employee engagement surveys. In those earlier days, you could point to supportive literature more plentiful than there are days in a decade; scientific studies, academic papers, strategic business reports all praising this tool of the HR trade.

Now, the survey's behind you and results are in. Employees have had their say. They're ready and eager for change. You're ready and eager to move into action. But your change agents – team leaders, supervisors, front-line and middle managers, even some senior executives – aren't all on board.

Questions and objections surface like oil on vinegar:

- What do these numbers mean to me?
- My team?
- My department?
- My division?
- What am I meant to do with this information?
- Where do I start?
- We don't have time for this kind of thing.
- It's not relevant to what we do.
- Meetings are too time consuming; productivity will suffer.

Unfortunately, there's a dearth of information to guide you through next steps. Nothing as prolific as the resources that helped get you to this point. That's where post-survey consulting and professionally facilitated planning workshops can ease the transition from thought to action. Section Five outlines details.

TalentMap has observed three common post-survey difficulties and recommends you prepare for these hurdles before they become full-stop obstacles.



HURDLE #1: DIFFERING VIEWS AND PRIORITIES

You can anticipate three distinct management responses post-survey:

- Those who buy-in completely and unequivocally
- Those who don't (surveys are a waste of resources, why do we even bother)
- Those somewhere in between who cite time as their chief concern

Your number one job is to find out who sits where and coach them accordingly.

HURDLE #2: INEXPERIENCE

Your executive leaders usually have the advantage of high-level presentations and reports that delve into findings and pinpoint actionable areas. For the rest of management that's not necessarily the case. Turning survey action planning loose on the whole organization means making sure basic knowledge and skills are covered and in place across all levels of management – from how to read and interpret, understand, and communicate survey findings to running effective meetings and smoothing the way for change.

HURDLE #3: TRADE-OFF THINKING

“Yeah but... if we do this we'll forfeit that. It's either our regular work or employee engagement.” You know both co-exist quite nicely and lead to improvements. It's a question of sharing this knowledge convincingly and demonstrating how to get there.

Don't sweat these difficulties. Just know what to expect and plan your next steps. Prepare to wrestle down objections and step into the fray ready for action – with TalentMap coaching from your corner.

From focus groups to action planning resources, TalentMap has a menu of action planning services and resources that can help empower your leaders to implement positive organizational change at enterprise-wide and local levels, including:

- Toolkits for managers
- Action planning and visioning workshops for senior leaders and managers
- JumpStart action planning workshops with participation from all levels
- 1-1 coaching and consulting

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Part 4: Action plan tactics

There's no universal solution when it comes to post-survey action planning. Essentially, tactics fall into a handful of distinct categories. Many organizations have success mixing methods. Choosing the right approach depends on your organization's corporate culture, leadership style, the abilities of your different managers, and a compendium of other circumstances.

STRATEGIC BREAKTHROUGH

The strategic breakthrough approach to 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.

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. Each decision and action trickles into the next, and so on.

BOTTOM-UP

In the bottom-up approach, action planning originates from the front lines or grassroots of your organization. Survey action plans are tailored to fit employee engagement touchpoints specific to each workgroup, department, and division, feeding across and up your organization.

BASED ON EXPERIENCE, TALENTMAP HAS FOUND THE BEST ACTION PLAN IS THE ACTION PLAN EMPLOYEES DEVELOP THEMSELVES.

Action planning led by employees boosts employee engagement because the process itself demonstrates that the opinions of each person on the team are important. The key ingredient is really all about getting employees involved at all levels.

Right from the get go, prior to even rolling out the survey, form an engagement steering committee. What you want to achieve is getting employees involved as soon as possible to empower employees. Engagement is not an exclusive management issue. It's an organization issue. Employees have to be empowered to take ownership. A steering committee is a good mechanism.



So who's on this committee?

What TalentMap has seen work best is to gather about a dozen employees from all levels and areas of the organization. Ensure at least one person from senior leadership is involved – an individual who won't lead the committee but will contribute as a member. This senior executive's presence is crucial because they can sell what comes out of the group to their colleagues and get recommendations implemented. Avoid manager/direct report committee participation – you want open and honest feedback and discussions.

Part 5: The role of senior leadership & people manager

When you implemented your survey, you entered into a contract with your employees that essentially leads to two expectations: one that employees will be informed of the results and two, that there's going to be some action taken as a result. Everybody who participated in your survey has those expectations.

TalentMap can prepare a comprehensive Executive Level Report with detailed findings. The Executive Level Report includes engagement scores, top box scores, key driver analysis, and analysis by key demographics, departments, functional groups, heat map analysis, and a ROI quad map analysis along with recommendations and next step suggestions by subject matter experts. Business Unit Reports provide the same level of detail and analytics as an executive report, but the data is drawn for a business unit.

The first thing TalentMap counsels after senior leadership has received findings is to present the results from one key person to as many people as possible. You want everyone to understand the results from the same page. If you cascade those results through different layers of management, what inevitably happens is there are different interpretations; people will get different messages. You don't want that.





Ask your CEO to present complete organization-wide results as well as drilled down department or workgroup results to front-line, mid-management, and senior leaders. If your top executive can do townhalls in person, that's great; if you can do them by webinar or video, that's great too.

- Pay attention to how information is delivered so that no one is slighted or put off
- Don't bring attention to any highlights or key actionable items, leave these observations and decisions to the bottom-up process
- Set the stage for what deliverables are expected:
 - What an action plan looks like, what it should include; for example:
 - A handful of quick wins (actions that require no resources, are easy to implement, and generate immediate results)
 - One or two long-term, high-impact actions
 - Alignment with corporate/organization goals

For optimal impact, TalentMap senior consultants can work in partnership with your executive team to develop a change management plan that raises awareness and buy-in and helps ensure that practical, credible, enduring changes are made based on survey results. A tailored **Executive Level Action Planning Session** based on the S.M.A.R.T. model prepares senior leaders to take ownership of the organization-wide action planning strategy.

To help managers read and interpret their own departmental snapshot reports and acquire the skills and resources for developing an impactful local level action plan, your organization can work with TalentMap to deliver **Do-It-Yourself (DIY) Workshop Training for Managers**. A maximum of 15-20 managers can participate in these hands-on, interactive sessions.

Through **Engagement in Action Training**, TalentMap's senior consultants also help managers understand the theory of engagement and apply the concepts to build an engaging workplace. A maximum of 15-20 managers can participate in these hands-on, interactive sessions. This half-day session can be run as a stand-alone workshop or as an add-on session to the Do It Yourself (DIY) Workshop. These workshops:

- Provide the training, tools and know-how to help workgroup leaders and managers
- Establish communication methods and schedules to share results
- Support weak managers (those flagged by survey results with lower scores)



Part 6: The formula for action planning success

TalentMap has assisted hundreds of organizations to measure and improve employee engagement. The following are the most common characteristics of successful action plans:

- Senior leader sponsorship and active support
- Employee involvement and extensive consultation
- A solution-focus on department drivers that feed into organization-wide engagement drivers
- Implement some actions quickly
- Employees champion actions
- Leaders are held accountable

What your organization does or doesn't do after an employee engagement survey reveals the true character of your leadership and corporate culture. Assert your allegiance to employees and their engagement survey feedback by following these steps to successful action planning.

STEP 1: MAKE A COMMITMENT TO ACT, RIGHT FROM THE GET GO

Data is only as strong as the muscle power that turns findings into actioning. Your organization's muscle power is the CEO and executives. Nab their interest from the very first moment survey discussions reach the boardroom table. Hammer home the necessity to act on results. Relay the goals and objectives of this business tool to mid and front-line managers. Explain their post-survey role. When survey findings are in, reiterate the duty to champion change. Nail down collective buy-in.

STEP 2: CREATE AN INTERNAL HR ACCOUNTABILITY PLAN

Identify what needs doing post survey. Pre-define a step-by-step process. Clarify roles and responsibilities – who will take on what, when, why, and how. Set guidelines with clear expectations and timelines.

STEP 3: PROVIDE TRAINING AND SUPPORT

Plan training to help leaders and managers understand their data. The last thing they need or you want is analysis paralysis. Provide information and tools for feedback meetings. Develop descriptions and samples of effective action plans. Identify and develop mechanisms for those needing extra support (e.g. facilitation skills training, individual coaching).



STEP 4: ROLL OUT THE ACTION PLANNING PROCESS

TalentMap has developed a unique JumpStart Action Planning Workshop that uses a range of techniques to kick-start bottom-up action planning.

The Jumpstart Workshop is a 1-day custom-designed session which involves roughly 25-50 participants. During this highly interactive, professionally facilitated workshop, attendees use creative ideation techniques to develop roughly 50-75 action ideas to improve employee engagement, usually based on the results of a client's engagement survey. Of these, workshop participants prioritize and build upon the top 12-15, leaving behind a concrete action plan to improve engagement which includes accountabilities and timelines. The workshop deliverables include:

- A detailed session plan with an agenda and description of creative exercises
- 50-75 action idea cards developed during the session
- An action plan built around 12-15 of the highest priority and most feasible ideas including accountabilities and timelines.

STEP 5: ALIGN ACTION PLANS

Make sure everyone's facing the same direction. Review and clarify organizational priorities and how business unit, department, team, and individual goals align vertically and horizontally.

- As action plans are completed at workgroup levels and roll up the organization, collect and review plans with senior management to spot trends and identify resources
- Work with your leadership team to select one to three actionable items from this bottom-up process
- Set and communicate key milestones and deliverable dates to keep everyone motivated and moving forward

STEP 6: COMMUNICATE

Communicate at every turn. Employees need to know they've been heard, understand their input is driving change, and see concrete evidence of that input leading to positive results.

- Make it clear your leadership team is committing resources and personal effort to see actionable items through to fruition
- Provide details about the selected actions, resources, and timelines
- Issue updates that link back to survey results; employees need to see this connection to become more engaged
- Showcase success stories: invite workgroup managers or designates to share their employee engagement initiatives at department meetings, in employee newsletter articles, intranet posts, and other forums. This small bit of fanfare can have a big impact, as a powerful way to recognize staff and build a culture of improvement.



STEP 7: MONITOR PERCEPTIONS OF PROGRESS

Consider running a Pulse Survey roughly six months into action planning to maintain awareness and gauge:

- Attitudes towards what's been happening; whether employees recognize these developments are connected to their employee survey feedback and
- How they perceive developments:
- Are improvements occurring?
- Is engagement on the rise?

STEP 8: LEVERAGE TOOLS AND TECHNOLOGY

Encourage business unit/division and department meetings. Make use of digital technology and other communication tools to help leaders and managers share, collaborate, and build action planning across the organization.

Part 7: Back to the continuous learning framework

You have an action plan. Now, how do you make employee engagement stick?

Employee engagement isn't a project with an end. Would you treat building "trust" as a project or process with a beginning and end? Employee engagement is about continuous connection.

Engaging employees must become part of your organization's DNA through:

- Leadership accountability
- Regular meetings of the employee engagement steering committee – your organization's standing committee to review progress and keep adding "fuel" in the form of new ideas
- Making sure people know about what's being done, what's changed or changing, how engagement has improved, and celebrate success – even little ones
- And ensuring the cyclical continuous learning framework is a mainstay of organization-wide strategic planning

Conclusion

With the help of this Post-Survey Action Planning guide, you should be on the right path to positive organizational change. For more information on TalentMap's post-survey action planning services, visit talentmap.com/action-planning



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About TalentMap

A thought leader focused exclusively on workplace engagement measurements and research, TalentMap is passionate about understanding the people behind organizational success: Employees.

Since its start in 1998, TalentMap has conducted thousands of employee engagement survey projects and surveyed more than one million employees. Working in partnership with public and private sector organizations of all sizes across North America, TalentMap's deep understanding of methodologies and assumptions unique to different sectors alongside volumes of benchmark data accrued over the years have become valued resources for organizations that value their people.

TalentMap employee engagement survey tools – readily customized from hire to retire – are based on years of research, field experience, and scientific measurement. The company also offers expert consulting services, deployment, data collection, analysis reporting, and post-survey action planning. It's a proprietary workplace intelligence process – developed and delivered by people-oriented people consumed with helping leadership teams and HR professionals create positive organizational change.

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