MANAGER'S GUIDE TO
ACTION PLANNING

Quantum
Workplace
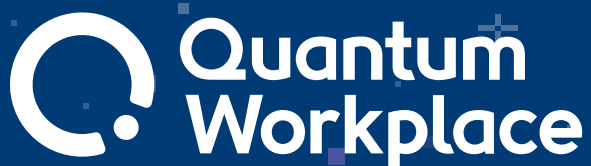
THE UNTAPPED OPPORTUNITY OF ACTING ON SURVEY RESULTS.

When your engagement survey ends, it's time for action. Action is mission critical to engagement—and as a manager, you have an enormous opportunity to make an impact on your team.

But we know what you're thinking. Action planning is complicated, overwhelming, and time-consuming. It's challenging to make time to review, discuss, and act on the data.

It doesn't have to be this way! Quantum Workplace is your ally on this pivotal mission.

We help make action planning:

35% of employees say their organization doesn't effectively respond to survey results. But...

...Employees who witness action on their feedback are **12X** more likely to be engaged.

~~Complicated~~
Simple.

Because you have a full-time job. You don't have time for a drawn-out, clunky action planning process.

~~Overwhelming~~
Strategic.

Because a one-size-fits-all approach doesn't work. You need expert recommendations that fit your team.

~~Time-consuming~~
Swift.

Because with the impact action has on engagement and retention of your team—you can't afford to wait.

In this guide, we'll walk you through:

- Foundations for effective action planning
- Our AFTER framework for effective action planning
- How to navigate action planning in Quantum Workplace

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FOUNDATIONS FOR EFFECTIVE ACTION PLANNING

You play a critical role in driving employee engagement on your team. When team members complete an engagement survey, they are not just checking a box. They're serving up valuable insights into their experiences and expectations at work. When you acknowledge and value their input through action, it enhances engagement, performance, and retention alike.

Get in the right mindset.

Before you dive into survey results and discussions, it helps to get in the right mindset. Approaching feedback with defensiveness or disinterest can hinder open communication and potentially disengage your team members. Recognize that survey results are an opportunity to gain insight and improve—rather than criticism to be countered.

You should avoid rushing to judgment or drawing conclusions based solely on your initial interpretation of the results. It's important to understand that your perception of the feedback may not fully capture your team's actual sentiment and needs. By remaining receptive and suspending immediate assumptions, you create a more inviting environment for meaningful dialogue. This approach not only facilitates deeper understanding of the issues at hand but also demonstrates to your team that their feedback is genuinely valued and impactful.

Take a continuous, incremental approach.

Engagement is not a one-time event. It's a continuous endeavor that extends far beyond the annual survey. It's crucial to view action planning as a year-round process that evolves with your team's needs and the organizational climate. Your survey is primarily a measurement tool—an initial step to help gauge the current state of engagement. The real opportunity lies in maintaining momentum beyond the initial surge of post-survey activity.

Think of engagement like building a muscle or developing a new habit. It's about creating small, manageable changes that are easily integrated into your team's daily operations. Then, you can build from there, layering on additional improvements or new objectives. As your team gets better at certain practices, you can introduce new challenges or goals. This keeps the engagement process dynamic and progressive, embedding a culture of continuous improvement in the team.

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AFTER FRAMEWORK FOR EFFECTIVE ACTION

Simplify, streamline, and speed up post-survey action planning with our "AFTER" framework. It's easy to navigate employee feedback, uncover actionable insights, and develop a plan to keep everyone on course for out-of-this-world engagement. By following these steps, you can build healthy engagement habits that lead to a more engaged and high-performing team.

ANALYSIS
Decode employee feedback.
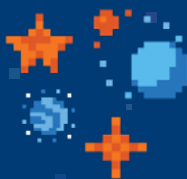
FOCUS AREAS
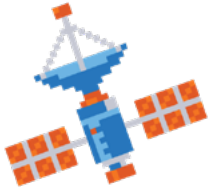Choose your guiding stars.

TEAM DISCUSSION
Collaborate with your crew.

EXECUTION PLAN
Map your mission.

REMINDERS & REINFORCEMENT
Maintain your trajectory.

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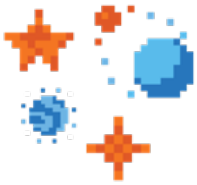
ANALYSIS: DECODE EMPLOYEE FEEDBACK

The first step to effective action is making sense of your survey results. You need to:

- Unearth insights: delve into survey results to spot engagement highs and lows
- Go beyond the score: identify themes and find context to guide improvement
- Share with your team: share high-level data and insights with your team

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FOCUS AREAS: CHOOSE YOUR GUIDING STARS

Analysis without focus can feel like navigating the universe without a compass. You need guiding stars to help you prioritize what matters most. Aim to:

- Prioritize strategically: choose 2-3 areas for targeted execution
- Focus on impact: elevate areas with the most potential to boost engagement

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TEAM DISCUSSION: COLLABORATE WITH YOUR CREW

Effective action planning cannot happen in a vacuum. Involving employees in the process helps them understand their feedback is being taken seriously. You need to:

- Tap team intelligence: utilize team brainstorms for collective problem-solving
- Dive deeper: ask questions to understand and improve the areas that matter most
- Get creative: foster open dialogue and design thinking for innovative ideas and action

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EXECUTION PLAN: MAP YOUR MISSION

It's time to launch! You need an execution plan that is specific, measurable, and well-communicated to guide you. You need to:

- Build your roadmap: craft a clear action plan with defined initiatives
- Ensure accountability: assign responsibilities and deadlines for measurable impact
- Check alignment: make sure actions align to focus areas

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REMINDERS & REINFORCEMENT: MAINTAIN TRAJECTORY

Once your plan is launched, it's essential to keep action top-of-mind to remain on course. This means communicating, tracking progress, and adjusting your plans as needed. You need to:

- Keep dialogue open: maintain regular communication and updates on plans
- Check in regularly: follow up to track progress and navigate challenges
- Evolve continuously: adapt plans to new insights and successes along the way

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No more blank page syndrome after your survey! Our AI-powered Action Planning tools streamline the process and offer recommendations for effective, engagement-boosting action. We help you and your team easily—and quickly—understand survey results and take strategic action.

How to Access Action Planning

Action Planning must first be enabled on a survey to create in-product Action Plans. Both Action Planning and access to a survey's analytics are configured by your Survey Administrator.

Once your Survey Administrator gives you access to a survey's analytics, you can create and manage action plans when your engagement survey closes.

Step 1: Review & Understand
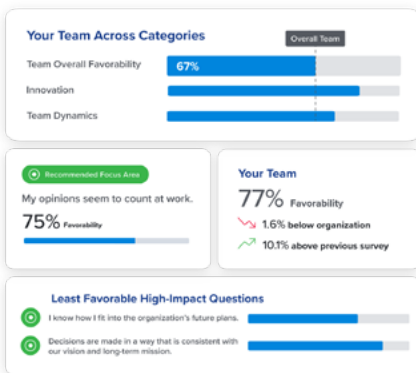
Your team's survey results are in! Begin by exploring the Team Report to uncover your team's strengths and opportunities. This report will help you:

- Understand essential terms and metrics
- Identify high impact questions (known as Recommended Focus Areas)
- Guide you in planning your next steps to enhance engagement

Quantum Workplace highlights your team's top three Recommended Focus Areas. These focus areas are automatically identified and added to your action plan by default. You can edit or remove these from your action plan

If your team does not have enough survey responses, depending on your access settings, you will be able to view results of an upline team or overall results. Regardless, you can still discuss results with your team based on your access and create Custom Focus Areas in your Action Plan.

Step 2: Communicate & Decide
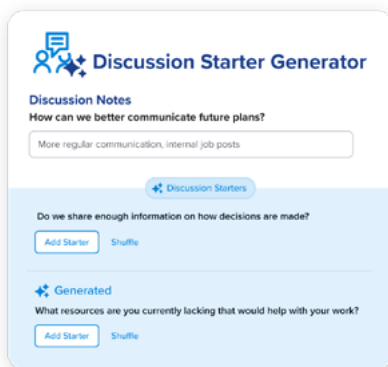
Next, set aside time with your team to share and discuss survey results. Using the Team Report, decide on 1-3 focus areas to discuss. Set an agenda ahead of the meeting that includes:

- The why behind the survey
- What the results are & what they mean for your team
- Discussions starters to dive deeper into focus areas

Quantum Workplace provides expert-informed, AI-powered discussion starters to help spark quality, personalized conversations based on your team's results. These help you effortlessly uncover and address your team's unique needs to spark meaningful conversation.

Step 3: Follow Up with Action

Now, it's time to decide how to act. You can choose "Generate Ideas" directly within your team's Action Plan to get started. These AI-powered recommendations are created with guidance from Quantum Workplace's in-house experts to ensure recommendations align with best practices in organizational and team engagement. They use discussion notes and your team's unique engagement data to tailor action ideas to your chosen Focus Areas.

As you're creating your plan, remember that "action" shouldn't feel like an additional task or a disruption to your team's workflow. Think about small changes you can integrate into how your team operates day-to-day and build from there.

Setting milestone expectations to drive ownership & accountability

Once you've completed your action plan, you can assign Owners, Contributors, and Viewers to encourage transparency and accountability. Both Owners and Contributors can complete and manage Action Items, but the Owner is ultimately responsible for the plan's progress. Viewers can see the action plan but can't make changes. An Action Plan can only have one Owner, but it can have multiple Contributors and Viewers.

Step 4: Monitor Progress & Celebrate Success
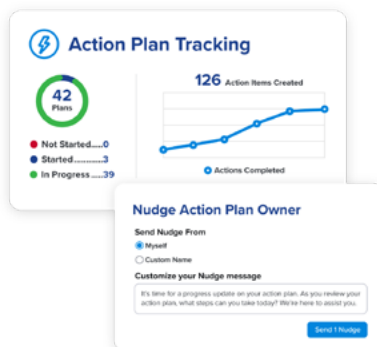
If you own or are involved in multiple Action Plans, you can use our Action Plan Tracking & Nudging tools to keep track of progress and ensure everyone is accountable. The manager dashboard shows how many tasks have been created and how many are completed over time. You can also look up plans by status, name, or owner. Plus, the dashboard makes it easy to send personalized reminders to people in charge of plans, helping to keep their teams on track.

CONCLUSION

You now have the essential tools and strategies you need to transform employee feedback into tangible improvements. With Quantum Workplace by your side, you're not just responding to survey results; you're well on your way to enhanced engagement and performance.

By simplifying, strategizing, and saving time, we ensure that your action planning is as effective and efficient as possible. Remember, true engagement is a journey—not just a single step. Let this guide be your roadmap to fostering a culture of continuous improvement.

Start today--your team's engagement, success, and retention are depending on it!