ActionPro® Section III: Action Planning

ActionPro® offers the ability to create, track, and manage action plans to support implementation of your survey results.

Action Planning Overview

<table>
<thead>
<tr>
<th>Action Planning</th>
<th>Global Action Plan – This area contains action plans created for the entire organization, based on areas of opportunity in the total organization results.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global Action Plan</td>
<td>Action Plan Global Status – The Action Plan Global Status page provides a breakdown of the number of action plans and recommendations active for each survey item. Only Action Plan Reviewers can see this section.</td>
</tr>
<tr>
<td>Review/Approve Action Plans</td>
<td>Review/Approve Action Plans – This section allows some managers to review and approve action plans. Only those responsible for managing action plans will see the Review / Approve Action Plans button.</td>
</tr>
<tr>
<td>Create/Update Action Plans</td>
<td>Create/Update Action Plans – This section is where you can create new action plans or manage existing plans.</td>
</tr>
<tr>
<td>Delete Action Plan</td>
<td>Delete Action Plan – Go here to remove action plans from the system. You can delete your own action plans, but you may not have access to remove plans created by another user.</td>
</tr>
</tbody>
</table>

Action Planning Basics

While each area of the Action Planning system has differences, there are some common attributes that they share.

Buttons

- **Create Plan** – Click this button to create an action plan for the survey item shown. This button will only appear for items without an action plan already created.
- **Modify** – Click this button to make changes to an action plan that has not yet been approved. For example, you would see this button if you have created and saved a plan but not submitted it. Alternately, you might see this button if your Action Plan Reviewer rejected the plan. If this is the case, you may also see a section at the bottom of the edit action plan page that displays comments from the Reviewer, as shown in the yellow box below.

```
Admin Comments: 04/17/2008
This is not good enough. Create a more involved solution.
```

- **Plan Created** – When you create an action plan for a survey item, and it has been approved, this button appears and that particular survey item is highlighted pale yellow.
- **Saved Plan** – Click this button to view and edit the action plan for that survey item before submitting for approval. It appears when an action plan has already been created for an item but has not been submitted. Modifications can still be made to the saved plan.
- **Auto Saved** – This button designates a plan that was auto-saved by the system. Auto-save occurs every two minutes. Any work done since the last auto-save is not saved.

- **View / Edit** – Click this button to update the action plan as you progress. Once you click it, you will navigate to the plan page, where you will have the option to choose **Incomplete** or **Complete** for each plan item.

- **View** – Click this button to view previously completed action plans. You cannot make changes to these plans, as they have already been closed.

### Create/Update Action Plans

#### Overview Page

When you click on the button to create an action plan, you will navigate to an overview page. At the top of the page, you will see basic information about the organization: Manager Name, Department Name, and the number of People Surveyed.
When at least one plan has been created, the overview page shows four categories of plans: Saved Action Plans, New Action Plans, Action Plans In-Progress, and Completed Action Plans.

A. **Saved Action Plans** – plans which have already been created but not yet approved and made active.

B. **New Action Plans** – Any plans that have been rejected by the Action Plan Reviewer will display here, as they are beyond saved but not yet in progress.
   - Both Saved and New Action plans will show the status of the action plan as:
     - **Waiting for Acceptance**– Action plans that have been submitted but not yet accepted.
     - **Rejected** – Actions plans that were not approved. If a plan displays this status, the workgroup manager can modify and resubmit the plan.

C. **Action Plans In-Progress**– plans which have had some progress marked. Action plans in progress will also show the status of the percent complete for each action plan in progress.

D. **Completed Action Plans**– plans which have been marked as done. Completed action plans offer the Action Plan Reviewer the opportunity to rate the plan success of the plan. Ratings are on a five-point scale: Excellent, Good, Average, Poor, Very Poor.

**Creating an Action Plan**

To create a new plan, click on the **Create/Update New Action Plan** button, located at the top of the Overview page, just below the Manager Name. You will navigate to the Manage Action Plan page, where you can create a new plan.

At the top of the page, select one of three possible methods for creating an action plan: Existing Opportunities, Additional Items, or Custom Plans. By default, **ActionPro** will display the Existing Opportunities method.
**Existing Opportunities**

This page is separated into two sections: **Opportunities for Improvement by Compared to Rest** and **Opportunities for Improvement by Most Unfavorable**.

**Opportunities for Improvement by Compared to Rest**

These opportunities are the workgroup’s lowest-scoring survey items, compared to the rest of the organization.

<table>
<thead>
<tr>
<th>Opportunities for Improvement by Compared to Rest</th>
<th>This Groups Score</th>
<th>Total Organization Score</th>
<th>Compared To Rest Of The Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Satisfaction with the work</td>
<td>36%</td>
<td>76%</td>
<td>-42%</td>
</tr>
<tr>
<td>Promotions/Career Advancement</td>
<td>0%</td>
<td>32%</td>
<td>-34%</td>
</tr>
<tr>
<td>Supervisory Promotion of Teamwork and Participation</td>
<td>36%</td>
<td>59%</td>
<td>-23%</td>
</tr>
</tbody>
</table>

**Opportunities for Improvement by Most Unfavorable**

These are the survey items for this group with the highest Percent Unfavorable score.

<table>
<thead>
<tr>
<th>Opportunities for Improvement by Most Unfavorable</th>
<th>Percent Unfavorable</th>
<th>Percent Favorable</th>
<th>Percent Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>There are cost-saving opportunities in my department that have not been taken advantage of by this organization</td>
<td>64%</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>Supervisory Promotion of Teamwork and Participation</td>
<td>45%</td>
<td>36%</td>
<td>59%</td>
</tr>
<tr>
<td>Concern for Employees</td>
<td>36%</td>
<td>55%</td>
<td>62%</td>
</tr>
</tbody>
</table>

**Additional Items**

If you would like to create an action plan from an item not listed under Existing Opportunities, try the Additional Items section. This section displays any item from the survey.

<table>
<thead>
<tr>
<th>Opportunities For Improvement</th>
<th>This Groups Score</th>
<th>Total Organization Score</th>
<th>Compared To Rest Of The Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supervisory Promotion of Teamwork and Participation</td>
<td>51%</td>
<td>63%</td>
<td>-13%</td>
</tr>
</tbody>
</table>

| Create Plan | I have an opportunity to participate in decisions made by my supervisor that affect my work environment. | 36% | 59% | -23% |

| Create Plan | My supervisor encourages me to try new ways of doing my job. | 50% | 64% | -13% |

| Create Plan | My supervisor encourages my work group to work as a team. | 64% | 73% | -10% |

**Custom Plan / Feedback**

If you would like to create an action plan not based directly on a survey question or dimension, select the radio button for Custom Plan / Feedback. ActionPro® will generate a blank action plan template so that you can create a completely custom plan.
Add/Edit Action Plan

To create your action plan, simply click the Create Plan button. You will navigate to the Add/Edit Action Plan page for the item or dimension selected.

<table>
<thead>
<tr>
<th>Satisfaction with the work</th>
<th>This Group Score</th>
<th>Total Organization Score</th>
<th>This Group Compared to rest of the Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>My job gives me an opportunity to learn new skills.</td>
<td>36%</td>
<td>70%</td>
<td>-42%</td>
</tr>
</tbody>
</table>

Mentoring

The Mentoring section displays other workgroup managers within the organization who scored well on a particular item. To see the list, click the double arrow button at the right side of the blue bar. The number of survey respondents for each manager is listed next to his or her name in parentheses.

To help you get in touch with a mentor, ActionPro® will automatically generate a sample email, which you can modify, in a separate window when you click on that manager’s name.

Outcome Statement

Next, enter an outcome statement in the appropriate field. Think of an outcome statement as a measurable goal that pertains to the survey item.

Next, check the box next to one or several of the action plan items that would help you reach your outcome statement goal. This list is automatically generated by ActionPro®, based on HR Solutions’ library of recommendations, and sorted from most to least popular.
You can edit the existing recommendations by clicking directly on them or add a new custom recommendation by clicking the **Add Action Plan Item** button. By default, custom recommendations are shared any time a user in the organization elects to see them. However, if you would like to prevent others from seeing your custom recommendation, just uncheck the box in the **Allow to Share** column (A).

If you want to see custom items created by other users in your organization, click the **Recommendations from other users** link, located just above the New Action Plan Items list; this will append custom recommended items to the bottom of the standard list.

**Recommendations from other users**

<table>
<thead>
<tr>
<th>New Action Plan Items</th>
<th>Add Action Plan Item</th>
<th>A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recommendations</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Custom Item</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Once you have selected the action plan items, choose whether the item will be ongoing by checking the **Recurring** box. Or, if you plan to implement the item by a specific date, you can type that date into the **Implementation Date** field. Finally, designate a specific person to be responsible for managing this particular item, to ensure accountability.

At the bottom of the plan, you must set an end date for successful completion of your outcome statement. You can click the drop down menu at the bottom of the page and choose a date on the calendar or type directly into the date field. Be sure to choose a date that is later than any implementation dates you have set for specific plan items or the system will reject the end date.

When you have completed all information on the page, click the **Review Plan** button to go over your plan before submitting it.

**Action Plan Preview/Review**

Once you have entered all the information and clicked the **Review Plan** button, you will be directed to the Action Plan Preview/Review page. Here you can check details of your plan before you submit it for approval. If you need to make a change, be sure to use the **Modify** button at the bottom of the page, rather than the browser’s back button, which will cause you to lose the information you have entered.
Action Plan Review Buttons

At the bottom of the page you have several options regarding your action plan, listed below:

A. **Print** – Print the action plan.

B. **Email Action Plan** – Allows you to email the action plan to a colleague.

C. **Save** – Save the action plan to submit at a later date. Action plans are also AutoSaved every two minutes and stored in the system under the Saved Plans section on the Overview page.

D. **Modify** – Go back to the previous page and make modifications to your action plan.

E. **Submit** – Submit the plan to your Action Plan Reviewer. Submitting an action plan automatically saves it in the system. After you click Submit, a popup box will appear confirming that the action plan was sent to your Action Plan Reviewer.

Submitting a Saved Action Plan

After you have created and saved your plan, you must submit it to your reviewer before work on it can begin. Click the **Modify** button to view the plan and make any final changes if needed. Remember to carefully review your plan details as once you submit it, you must wait for them to either approve or reject the plan before you can make further change to it. Once you are satisfied that the plan is correct, click on **Submit** to send it to the administrator for approval and comments.

Modifying an Action Plan

Once the Reviewer accepts your action plan, you can continue to modify it, meaning changing the recommendations. Whenever you modify the plan, ActionPro® sends an update to your Action Plan Reviewer, and the status of the plan is set to “Waiting for Review on Modification.” The changes will not show in the plan until they have been accepted by your Action Plan Reviewer.
Updating an Action Plan Status

Once an action plan has been approved, it will automatically move into the “Action Plans In-Progress” state. Select Create/Update Action Plans (under the Action Planning button) and the following screen will appear:

<table>
<thead>
<tr>
<th>Item</th>
<th>Created Date</th>
<th>Status (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>I feel a sense of loyalty to the organization.</td>
<td>10/25/2010</td>
<td>0%</td>
</tr>
<tr>
<td>This organization makes an effort to help employees improve themselves.</td>
<td>10/12/2010</td>
<td>25%</td>
</tr>
</tbody>
</table>

An on-going step is updating the action plans. When you or your team have completed an action step/recommendation, click on the View/Edit button, click on the completed button next to the task that was finished, you can also add comments (remember to click save), and finally click the submit button as shown below.
Once you have pressed submit the status bar will show you the percentage completed for the action plan. This quick visual will allow you to know the status on each action plan you developed.

<table>
<thead>
<tr>
<th>Type</th>
<th>Action Plan</th>
<th>Created Date</th>
<th>Status (0-100%)</th>
<th>View</th>
<th>Add</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item</td>
<td>Senior managers frequently visit my department.</td>
<td>04/26/2011</td>
<td>50%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Completing an Action Plan**

When you have marked all the action items in a plan as complete, and clicked the submit button, the plan is moved to Completed Action Plans and the Action Plan Reviewer is notified. Your Action Plan Reviewer can also give your completed plan a rating. Ratings are on a five-point scale: Excellent, Good, Average, Poor, Very Poor.

<table>
<thead>
<tr>
<th>Type</th>
<th>Action Plan</th>
<th>Start Date</th>
<th>End Date</th>
<th>Rating</th>
<th>View</th>
<th>Add</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item</td>
<td>This organization makes an effort to help employees improve themselves.</td>
<td>10/12/2010</td>
<td>11/22/2010</td>
<td>Not Provided</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Delete Action Plan**

To delete an action plan you have created, just click the Delete Action Plan button under the Action Planning menu. This will navigate you to a page which lists all of the action plans that you have created. You can only delete plans which you created, unless you are an Action Plan Reviewer.

**Review/Approve Action Plans**

If you are an Action Plan Reviewer, you will see this menu option. By clicking on the Review/Approve Action Plan button in the Action Planning menu, you can view, accept, or reject action plans created by managers under your supervision. If you are not an Action Plan Reviewer, this section of the guide will not apply to you.

**Action Plans Overview**

The Action Plans Overview page (next page) shows the current status of all action plans that you are in charge of administering.

You can search by a specific manager or workgroup name in the search box at the top of the page, or just select the plan you would like to review.

The Action Plans overview page contains two tabs. Those tabs are:

- **Plans to Approve** – displays plans that you need to approve for the managers under your jurisdiction. This is the default view.

- **View All Plans** – shows all plans for managers under your jurisdiction.
A. **Workgroup Manager** – This column shows the name of each manager creating action plans.

B. **Workgroup** – This column shows the name of the workgroups for each manager.
   - If you click on the workgroup name under either the Manager or the Group column, you will navigate to a page with more information on that manager or group’s current action plans, the Work Group Manager Overview.

C. **New Action Plans (To be reviewed)** – This column shows how many action plans for each manager are waiting for your review.

D. **Action Plans In Progress** – This column shows how many action plans each manager has started but not yet completed.

E. **Action Plans Completed** – This column shows how many action plans each manager has started but not yet completed.

F. **Saved Plans** – This column shows how many action plans each manager has saved but not yet started.

G. **Rejected Plans** – This column shows how many action plans you have rejected for each manager. The manager will need to modify and resubmit these plans for approval.

**Work Group Manager Overview**

If you click on either the manager’s name or the work group sections of the Action Plans Overview, you will navigate to the Work Group Manager Overview page.

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
</tr>
</thead>
</table>

---

**Work Group Manager Overview**

**Action Plan Administrator**

**Manager Name:** Jane Doe  
**Department Name:** Accounting/ABC Organization  
**People Surveyed:** 20

### Overview

#### New Action Plans for Review

<table>
<thead>
<tr>
<th>Type</th>
<th>Action Plan</th>
<th>Created Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Action Plans In Progress

<table>
<thead>
<tr>
<th>Type</th>
<th>Action Plan</th>
<th>Start Date</th>
<th>End Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>07/30/2010</td>
<td>09/17/2010</td>
<td>In-Progress</td>
</tr>
</tbody>
</table>

#### Completed Action Plans

<table>
<thead>
<tr>
<th>Type</th>
<th>Action Plan</th>
<th>Start Date</th>
<th>End Date</th>
<th>Completed Date</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Saved Action Plans

<table>
<thead>
<tr>
<th>Type</th>
<th>Action Plan</th>
<th>Created Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Rejected Action Plans

<table>
<thead>
<tr>
<th>Type</th>
<th>Action Plan</th>
<th>Created Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Action Plan Reviewer Buttons

You can view action plans created by managers under your umbrella at any time by clicking on one of the buttons below:

- **Review** – Clicking on this button allows you to review the action plan and decide whether to approve or reject it in its current state.
- **Review All Plans** – If there are more than two action plans submitted by a department / manager, you can review all plans at once in a global summary, and add comments to each plan and approve all of them in one step.
- **Progress** – Clicking on this button allows you to see the current progress of the action plan.
- **Email Work Group Manager** – Clicking on this button will create a new section below the action plan where you can type comments to the workgroup manager about the action plan.
- **Rating** – This button displays at the bottom of completed action plans, allowing the Action Plan Reviewer to give the completed plan a success rating.
- **Comments** – This button displays at the bottom of a completed action plan, allowing an Action Plan Reviewer to leave comments on the completed plan or rating.
- **View All Action Plans** – If you click this button, you will see all of the action plans created for a specific workgroup or groups at once. Select the group(s) from the hierarchy displayed and click Submit. Each action plan is displayed on its own page and all of them can be printed or exported for later reference.
- **Overdue Action Plans** – Any action plan that is considered past due will have a red background.

Reviewing Action Plans

As an Action Plan Reviewer, it is your job to accept or reject action plans submitted by workgroup managers under your jurisdiction.

[Accept] [Reject]

Commenting on Action Plans

You are required to add additional comments to any plans you approve or reject to send back to the manager for review.

Reviewing Completion of an Action Plan

When a workgroup manager marks all items in a plan as complete, you will receive an email notification. You can then review each completed plan, enter comments, and provide a rating (optional). Ratings are on a five-point scale: Poor, Average, Good, Great, and Excellent. Select a rating to mark the overall execution of the action plan as additional feedback for the manager who created the plan. Once you have selected the appropriate rating, click the Save button.
Action Plan Statistics

If you click on the Action Plan Statistics button, you will navigate to a page which shows a breakdown for the total organization by the status of action plans in the system.

B. **Action Plans Count** – The total number of action plans related to that survey item.
C. **New Action Plans (To be reviewed)** – Action plans have been submitted but have not yet been approved by an Action Plan Reviewer.
D. **Action Plans In Progress** – Action plans that have been approved and have been started by the manager.
E. **Waiting for Review on Modification** – Action plans that were originally submitted and then modified that have not yet been re-approved.
F. **Action Plans Completed** – Action plans that were completed and approved as completed by an Action Plan Reviewer.
G. **Saved Plans** – Action plans that were saved by the user and have not yet been submitted.
H. **Auto Saved Plans** – Action plans that were saved by the system automatically. Auto saving occurs every two minutes
I. **Rejected Plans** – Action plans that were submitted and rejected by the Action Plan Reviewer and need to be modified before resubmitting.
Glossary of Terms

**Action Plan Reviewer:** An Action Plan Reviewer is someone responsible for review and approval of action plans. Typically, this is a manager who has other managers that report to him or her. An Action Plan Reviewer could also be a Client Administrator or could just be a regular Client User. Every organization determines who Reviewers are according to preferences and organization structure.

**Criteria:** Criteria are the options you select at the beginning of a report to tell ActionPro™ what specific data interests you.

**Client Administrator:** A Client Administrator is an ActionPro™ user who has the ability to modify aspects of the ActionPro™ experience for their organization. Client administrators are designated by the organization, and can perform some actions which regular ActionPro™ users cannot.

**Client User:** A client user is a regular ActionPro™ user, typically a Manager in the organization who has access to the basic features in ActionPro™.

**Compared to Rest:** These comparisons examine the selected group(s) to the rest of the organization. The group selected is first removed from the organization total and then compared back to the *remaining* respondents. This means that the Compared to Rest score is not always an exact difference between the group’s score and the organization’s score. Removing the group from the organization total is a more statistically accurate comparison.

**Dimensions:** Survey dimensions are a broad-based category of survey question. They are as follows: Outcome Variable, Organizational Effectiveness, Recognition/Career Advancement, Supervisory/Management and Coworker Performance/Cooperation.

**Favorable:** Favorable generally refers to the respondent choices that are either “Agree” or “Strongly Agree.”

**Items:** Survey items are individual survey questions

**Mean Score:** The mean score option displays data as a score between 1 and 5 where 1 is the most unfavorable response and 5 is the most favorable.

**Norms:** These values show the typical figures for your industry and a particular area.

**Reverse-Scored:** These items are designated “favorable” or “unfavorable” opposite to the other items. For example, while normally “Disagree” or “Strongly Disagree” would be considered unfavorable responses, they might be considered favorable for that particular survey item.

**This Group:** Columns which refer to “This Group” display data only for the workgroup selected in the criteria.

**Total Organization:** Total Organization scores include all the survey data collected for your organization for a particular year.

**Unfavorable:** Unfavorable generally refers to the respondent choices that are either “Disagree” or “Strongly Disagree.”