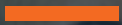


Action Planning for Positive Change

Produced by People Insight



Action planning for positive change

Effective post-survey planning can improve performance and engagement and promote lasting change in your organisation. Start thinking about it early in the survey process to give your organisation the best chance for success.

What you'll find inside:

- ▶ Action-planning framework
- ▶ How to identify your key issue areas
- ▶ Advice to help implement and sustain change
- ▶ Help influencing engagement and ownership among managers
- ▶ Best-in-class examples of action planning



Your post-survey impact strategy

Hit the ground running by defining a post-survey strategy and making people at all levels clear about their roles.

Our consultants can lead a working strategy session to help dig into these questions, identify potential blockers and define your post-survey approach.

What we'll explore in the session:

- ▶ How your survey fits into wider change processes
- ▶ Assigning action owners
- ▶ Engaging your stakeholders
- ▶ Equipping your team for change
- ▶ Keeping up momentum post-survey



Want to know more?

Speak to your Account Manager about our post-survey planning workshops.

Getting your stakeholders on board

Engaging the right people can make a huge difference to how effective your post-survey actions are. You'll know what works best for your stakeholders, but these are our tips for how (and when) to involve each group.

Executive team:

- ▶ Identify your project sponsor
- ▶ Brief them early on what you need them to do
- ▶ Share key findings and priority issues
- ▶ Ask them to communicate and champion change
- ▶ Add action planning to agenda of Board/Leadership meeting

HR business partners:

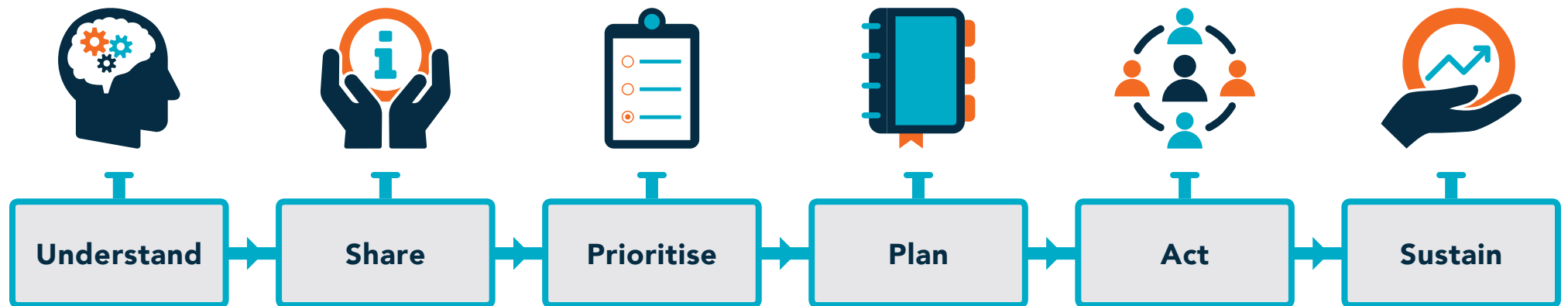
- ▶ Be clear about ownership and responsibilities
- ▶ Invite them to your results presentation
- ▶ Involve them in action planning workshops

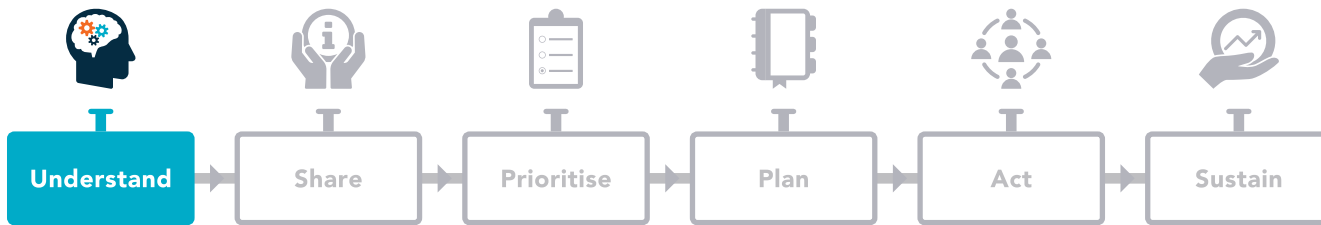
Managers:

- ▶ Get them involved in championing the survey – right from the start.
- ▶ Keep them updated throughout
- ▶ Brief them on what to do after the survey closes
- ▶ Share and help interpret their team's results
- ▶ Involve them in action planning workshops
- ▶ Give them ownership for change
- ▶ Support them with resources and training

Your action planning framework

Every organisation takes a unique approach, but we like to use this framework as a starting point.





It's time to explore your results and see what themes are emerging. Think about who needs to be involved to drive change within your organisation.

1. Look back at your survey purpose and objectives

What did you expect the issues to be? How do your results compare?

2. Consider how to enable change

- ▶ Who is going to drive change?
- ▶ How will change be supported by HR?
- ▶ How will you maintain progress?

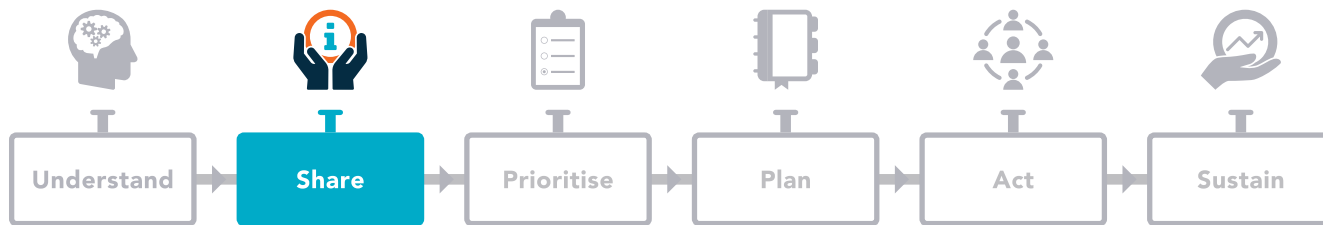
**This is where your
post-survey strategy
comes in**

3. Explore your dashboard

Get to grips with your survey results. Take a look at our [Dashboard Tour](#) Password: Pldashboard1# to help make the most of it.

What to look out for in your results

- ▶ What should you celebrate?
- ▶ Can you spot any quick wins?
- ▶ Is there anything you need to know more about?
- ▶ Are there any surprises?
- ▶ How do people feel about the overall engagement score? Is it where you want to be?



Engage leaders and managers with your results and what they need to do now.

Share highlights

Hold a feedback session to take key stakeholders through your overall score, key results, benchmark comparisons, key driver analysis and demographic comparisons. Bringing everyone to the same level of interpretation sets you up to start thinking about what change is needed.

Bring leaders with you

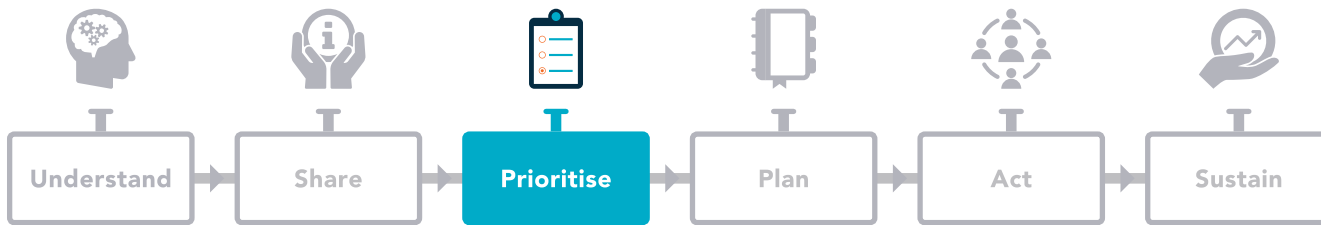
Help them understand the impact across the business and be clear about what you expect from them. Engage them in leading by example, communicating change to the business and aligning changes to the business vision.

Empower managers

Ensure managers have the autonomy and resources they need to take responsibility for change within their teams and adapt initiatives locally. Involve them throughout the action planning process so they're accountable for their team's results.

Talk to us about:

- ▶ **Feedback presentations:** Our consultants facilitate stakeholder sessions to share results, insights and recommendations for action. Hearing the interpretation delivered by a third party upholds anonymity and builds trust in the process.
- ▶ **Train the trainer:** An interactive feedback session led by our consultants to empower your managers and share insights into the changes that will have the biggest impact for their teams and performance. We give them the confidence and tools they need, create momentum for change and open-up conversations between peers.



Be clear about your key issues and don't take on too much. Pick 2-3 issues to focus on and commit to seeing change through.

Use your data:

- ▶ **Key drivers** help identify where to focus your resources. These are the survey items with the highest impact on your engagement score. You can dig into these on your dashboard to explore the data behind them.
- ▶ **Benchmarks** show how your scores look against your peers and whether you're looking competitive or lagging behind.
- ▶ **Historical data** can reveal whether you've improved since previous surveys or where there's still work to do.

Find the real issue

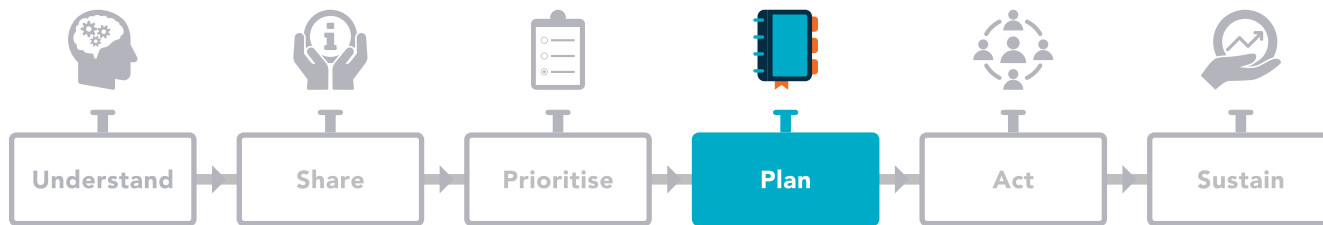
Dig into the themes emerging and help narrow down your issues by asking 'Why?' for each issue you've picked up on. You might need more detail from employees to get to the bottom of them.

Assess the business impact

Plot the impact of each issue against the ease of addressing it. Who would need to be involved? What obstacles are there?

Talk to us about:

- ▶ **Focus groups:** Involve your people to explore and solve specific issues from your survey results. Dig deeper into the key issues and ask employees for ideas to make change happen. Our experts create a safe space where people can speak up and come up with ideas to help solve problems.



You've identified the areas to focus on. Now let's put a plan in place to see change happen.

Create solutions

Keep people across the business engaged by crowdsourcing ideas and gathering feedback as you go.

Our tips:

- ▶ **Get creative** - how can you get people excited about the changes?
- ▶ **Separate your quick wins** from more strategic change.
- ▶ **Filter results by demographic** to see how scores differ. For demographics with higher scores, explore if there are any existing initiatives you could adopt.
- ▶ **Set timings** - break big ideas down into phases/steps and plan how to communicate what's going on.

Write it down

Use our [Action plan record template](#) overleaf to make a record of your plan.

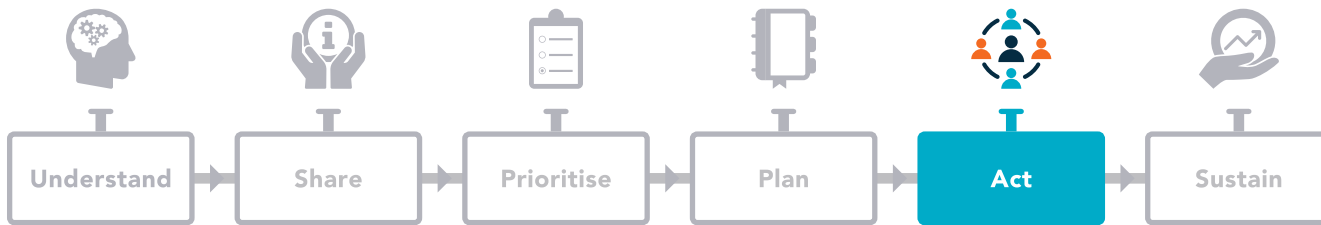
Talk to us about:

▶ Action planning workshops:

Our consultants facilitate a workshop with your senior leaders to direct their focus to the changes that will make the biggest difference, agree the next steps and help develop a plan to improve your employee experience.

Action Plan Record

Issue title	
Action title	
Owner	
Action summary	
Steps / Milestones	1. Completion date: / /
	2. Completion date: / /
	3. Completion date: / /
	4. Completion date: / /
	5. Completion date: / /
Required resources	



Let's go! It's time to put your plan into action and tell people what's going on.

Know who's accountable

Assign an owner to each task and identify the key stakeholders to involve and how you will measure the impact.

Deliver quick wins

Get started with actions that can be carried out by local teams or with limited business disruption. Show employees you listened to what they're saying and let them know the purpose of changes being made.

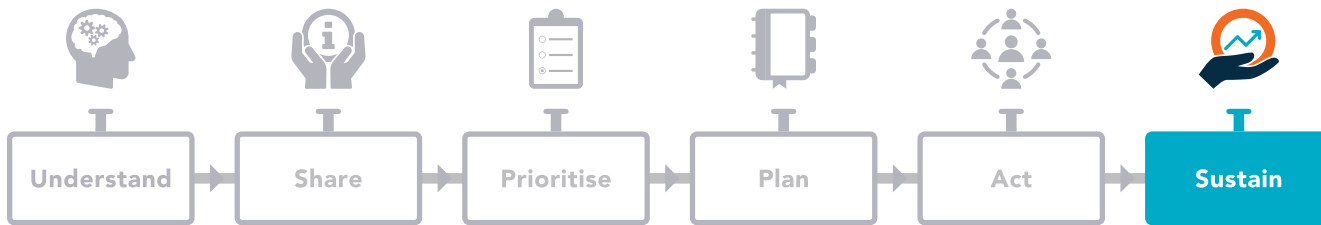
Keep people in the loop

Don't wait for the big "ta-da" moment to tell employees what's going on. Keep people engaged by communicating how small changes fit into the bigger plan.

Think about using: blog, newsletter, intranet, LinkedIn, team meetings, video messages, infographics.

Client example: Vinci Construction UK

Stakeholder backing has helped Vinci Construction UK to achieve a participation rate of 85% and engagement score of 83% (6% above benchmark). We hold pre-survey stakeholder interviews to tailor the questionnaire to each division and provide clear metrics to report against. Although HR steer the engagement programme, it is championed by their 4 MDs who use it to tackle specific priorities and are accountable for measuring the impact of change. Pro-active senior involvement demonstrates to staff that leaders want to hear their opinion and embeds employee engagement into the business.



Keep up the momentum once everyone is back to business as usual and set your team up for success.

Equip your team

Keep talking to your action owners and ask them what they need to deliver change successfully.

Keep people interested

Keep sharing updates around the business so people stay engaged with the change process. Secure a spot at a recurring meeting, dedicate a newsletter spread to survey comms or use your network of Leaders and champions to carry on the buzz.

Maintain momentum

As other priorities crop up, keep your progress on-track by celebrating milestones, checking in with action owners and encouraging your leaders to champion changes as they happen.

Talk to us about:

- ▶ **Videographics and Infographics:** Share results in a transparent and engaging way. Our videographics and infographics communicate your overall results and next steps in a way that's familiar to people and gets them excited about what's going on.

Client example: Arrow Communications

Following their employee survey Arrow Communications committed to several new programmes and initiatives; they also committed to providing more regular feedback about the changes they were making. Each quarter People Insight produce 'You Said, We Did' infographics which share Arrow's progress with each employee. They show the headline feedback from the survey, the changes and progress made since then and the key activities planned for the next quarter. The infographics keep up momentum around the survey so the excitement doesn't end when the survey closes and keep Management accountable for seeing change through.

Our tips for successful change!

Show you're listening

Identify any barriers or resistance to change in business and tackle it early in the change process. Create a positive change environment by making the benefits clear and communicating what's going on, and how it relates to what employees have told you.

Get to the cause

Do a deep-dive on issues to understand what's caused them, before making changes. Dig into the key drivers on your dashboard to help pick these out and follow up with employee focus groups to learn what's going on.

Bring leaders with you

Be clear about what you require/expect from them and what the changes will mean for the business. Ask them to actively demonstrate the behaviours and get behind the change process.

Engage people in the progress

Keep people informed at every level. Use your managers and champions to share progress among teams, and get your leaders on-board to publicly champion how the changes will improve your organisation. Set aside a regular slot at Board meetings for updates, and brief your senior team to share these more widely.

Empower managers

Encourage your managers to take responsibility for change within their teams and check they have the autonomy to make change & adapt initiatives.

Have fun with it

Group workshops, competitions and social-media campaigns are good ways to catch people's attention and show them you're committed to change. Go out and talk to people, get their ideas and keep the buzz going after your survey closes.

What People Insight can do to help

This can seem like a lot to do on top of your other priorities, but you don't have to tackle it on your own.

Our team of consultants and business psychologists work with clients on a range of issues, tailored to what each organisation needs.

So whether you need help developing an action plan, getting your stakeholders engaged or with any other challenge, speak to your Account Manager and we'll come up with a solution that suits you.

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Surveys



People Analytics



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