POST-SURVEY ACTION PLAN STEPS: DRIVING BUSINESS OUTCOMES

OVERVIEW

Any organizational leader is likely familiar with "action planning." When it comes to an employee survey, often times the action planning process can feel punitive and a hassle to managers with very full plates. SMD understands this and helps leaders easily create action plans from an employee survey by: 1) prioritizing topic areas for the entire organization to focus on in follow-up, 2) helping leaders focus within the priority topics based on their own work-group's performance, and 3) providing action planning tips and content that map directly to the topic areas they want to prioritize.

By:
Hannah Spell, Ph.D.,
Director of Research & Analytics

SMD

Building on SMD's recent study, "The 5 Keys to Action Planning That Drive Real Results", of over 1,200 leaders across 30 organizations, *this whitepaper will unveil the specific actions that leaders have taken to drive significant increases in their employee survey scores* (on average 0.10 on a 5-point Likert Scale) as well as business outcomes such as:

- Customer Satisfaction
- Productivity
- Voluntary turnover
- Sales
- Safety

FOUR PILLARS OF SUCCESS

SMD examined in detail the action plans of 780 managers who had statistically significant improvement in their business results and in their year-over-year employee survey results to find out what made those action plans different and effective. First and foremost, action planning has a lot to do with discipline around the process, so it wasn't a surprise that leaders with the most significant improvements in business outcomes and survey scores did four things:

1. **Included Focus/Promote areas in action plans** (94%). SMD's patented technology, advanced analytics show leaders exactly which survey categories have the biggest impact on business outcomes. We call these Focus (key drivers, but low scoring) and Promote (key drivers, and high scoring) areas.
2. **Added their own action items and/or customized SMD's tips** (74%). SMD's flexible platform allows customers to add their own action items, customize our catalog of best practices, and add links directly to their own learning management system (LMS) courses.
3. **Had their action plan reviewed/approved by their managers** (64%). SMD's platform makes it easy for leaders to request their managers' approval of their plans.
4. **Updated the plan throughout the year** (61%). SMD sends out follow-up reminders to leaders throughout the year reminding them to update their action plans.

THE SPECIFIC ACTIONS

The following list represents the most impactful actions from SMD's catalog of best practices honed over a decade of work and research.

Senior Management

- Your employees should have regular contact with your immediate manager, as well as other senior management. Invite senior leaders to periodically attend staff meetings and provide updates to your team.
- "Coach-up" local and senior leadership on their performance in leading the organization.
- Make sure you share communications from the leadership team in a timely manner. Encourage your team to discuss how changes will affect them individually and as a team. Take action to mitigate any risks created by the change.

Career Development

- Create career development plans with employees that have specific action steps. Align individual development with the needs of the organization. Make sure that employees understand that their development is also their responsibility and take ownership of the process.
- Meet with employees to determine their current knowledge and skill levels as well as their perceived training needs/gaps.
- Have annual career development discussions with all employees.

Customer Focus

- Invite a member of the Customer Satisfaction or Quality/Service team to your staff meeting to share customer information/data. Focus the conversation on both the good news and the bad news (e.g., complaints, dissatisfaction, positive feedback).
- During staff meetings, recognize employees that provide exceptional customer service or contribute to improvements in how your work unit improves the customer experience.
- Create a disciplined approach to managing by walking around/rounding with employees to uncover what their needs are and tools or resources that would help them.
- Facilitate a focus group with team members to identify existing gaps in tools and resources to provide exceptional customer care/service. Work on the easy fixes first and quickly. Employees will appreciate you meeting needs that are simple to address.

Management

- Reserve time at the end of all staff meetings to recognize the performance of direct reports and allow employees to recognize their peers for outstanding performance.
- Hold a team meeting to consider upcoming decisions that will impact your team. Encourage employees to discuss how these decisions impact their work and the team.
- Delegate more responsibilities to your team members. Appropriate delegation can be extremely beneficial in reducing your responsibilities while developing your employees' skills.
- You must be explicit and clear when setting goals. Make sure you communicate how goals/performance will be measured and what the rewards/consequences will be depending upon the individual's performance.

Teamwork

- Identify effective teamwork behaviors for your team. Develop with your team the target behaviors that will lead to improved teamwork. Monitor and reinforce appropriate behaviors.
- Set performance goals for the entire team. Identify how employees must work together to achieve the group goals. Routinely update the team on progress against the goal.

Accountability

- When an employee consistently fails to deliver adequate results, he/she must be held accountable. Provide process feedback and coaching along the way to achieving a goal or task. If their performance is still not acceptable, seek advice and counsel from your HR partner to develop a performance improvement plan for the under-performing employee.
- Review the policies and procedures for handling poor performance. Remind employees that punitive actions are not visible to other employees and are handled confidentially with the under-performing employee, HR, and management.
- Review employee's individual goals and their status on achieving their goals on a regular basis. Review and display the team's/location's goals in a common area and update the information as often as possible. Review and display the organization's overall goals in a common area and update the information as often as possible.

Job Fit

- Help your employees gain new experiences (e.g., project management) that align with his/her career development goals and provide new challenges.
- Meet with employees to determine their current knowledge and skill levels as well as their perceived training needs/gaps.
- Have annual career development discussions with all employees.

The actions listed above have been shown to directly impact the employee experience as well as business results for numerous organizations. SMD knows that with the right analytics (that show direct business impact), the right technology that brings those analytics to front-line leaders, and proven, practical actions, leaders can use the employee survey to have significant business impact.

SMD is the *only* firm in the survey and analytics industry to offer results-based pricing. By utilizing our expertise in data integration, surveys, and the most advanced analytics, all delivered through our patent-pending reporting and action planning platform, we've maintained a remarkable track record of improving business outcomes (e.g., voluntary turnover reduction) for our customers. Learn more at www.smdhr.com and contact us at info@smdhr.com.