



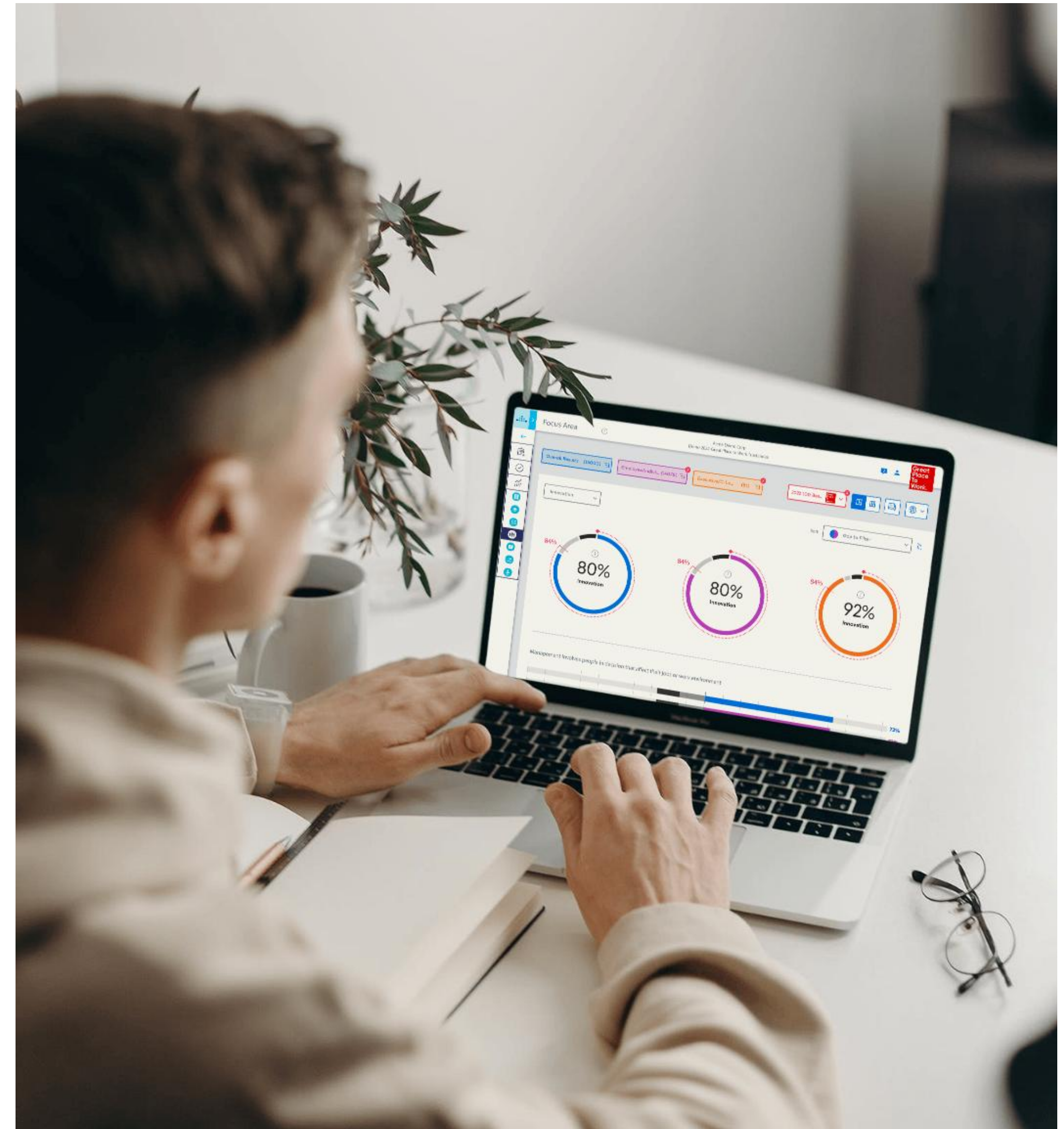
Action Planning: Turning Insights into Long-Term Success

The global standard for quantifying employee experience

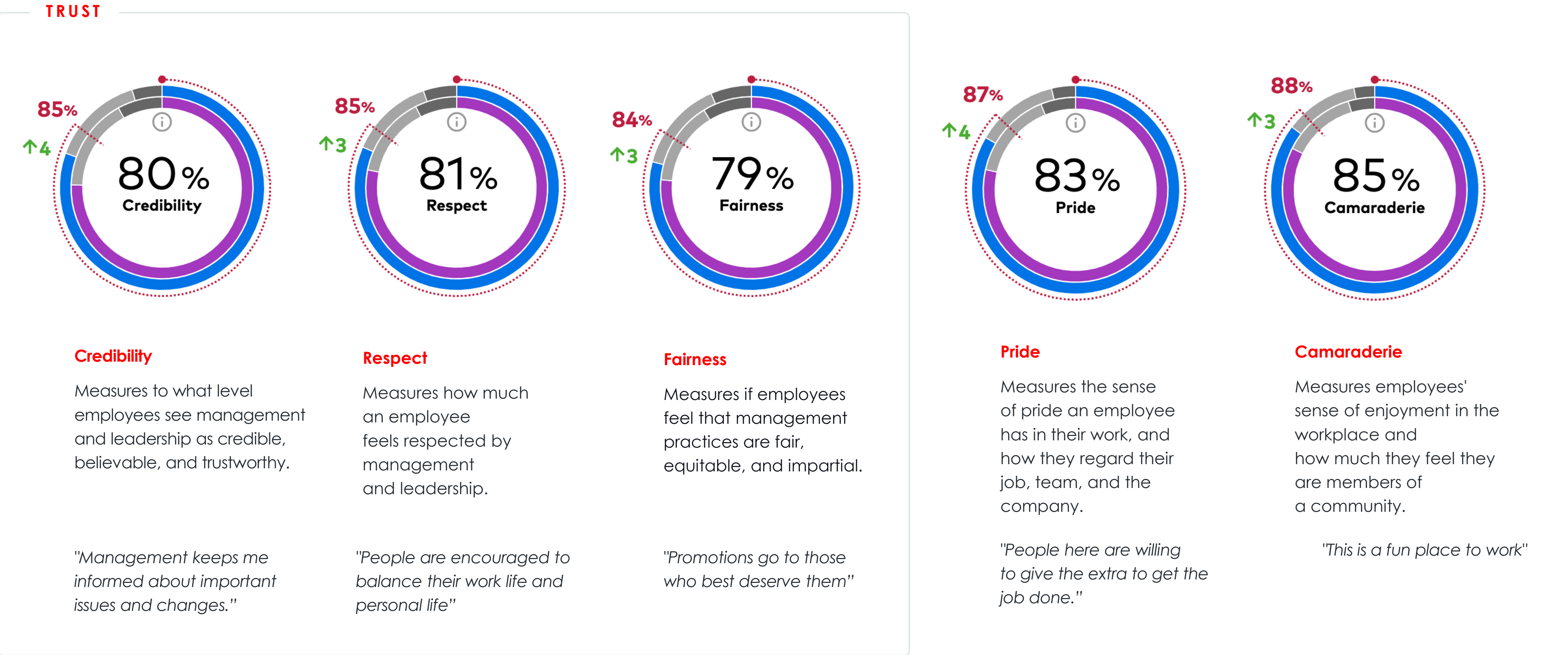
The Great Place To Work survey platform is backed by a data-driven model based on the feedback from over 100 million employees around the world.

Backed by 30+ years of research into employee satisfaction and trusted by the Fortune 100 Best Companies to Work For®, the Trust Index™ Survey consists of 60 statements to measure employee feedback.

Trust Index™ Survey results also go beyond raw numbers, incorporating real statements from current employees using two open-ended questions.



The Trust Index Survey measures what matters.



Action Planning

Now that you've completed your employee survey and gained a high-level understanding of your team's experience, the next step is critical—determining how to move forward. The results have been shared, and it's time to ask, "What have we learned, and how will we act on it?"

Your results likely fall into one of these categories:

01

Need for Corrective Action

You may need to implement a performance improvement plan to address areas that require immediate attention.

02

Reinforcing Progress

If you've seen positive changes, your focus might be on maintaining or accelerating this momentum.

03

Sustaining Success

If you're satisfied with your results, you may choose to maintain your current approach without any changes.

Regardless of where your organization stands, a thoughtful approach to action planning can help you make the best decisions for your workplace culture, ultimately building trust and driving meaningful change.

Action Plan

What is an Action Plan

An Action Plan is a living document that outlines the steps the organization is going to take to follow up on survey results. It can be created from scratch after each survey or can be updated to ensure the top priorities are always top-of-mind. It includes measures and clear objectives and is part of the feedback loop and listening strategy in an organization.

Why Create an Action Plan?

- Define priority issues and set objectives for desired outcomes.
- Identify barriers to building trust that impact your company's commitments.
- Track progress systematically to ensure feedback receives the attention it deserves.
- Show employees their feedback is valued to encourage continued participation in future surveys.

What is the Value Behind an Action Plan?

Employee surveys offer great insight into the experience of your employees which ultimately impacts customers and the bottom line. By listening regularly and acting, based on their feedback, companies can build trust and create a great place to work for all.



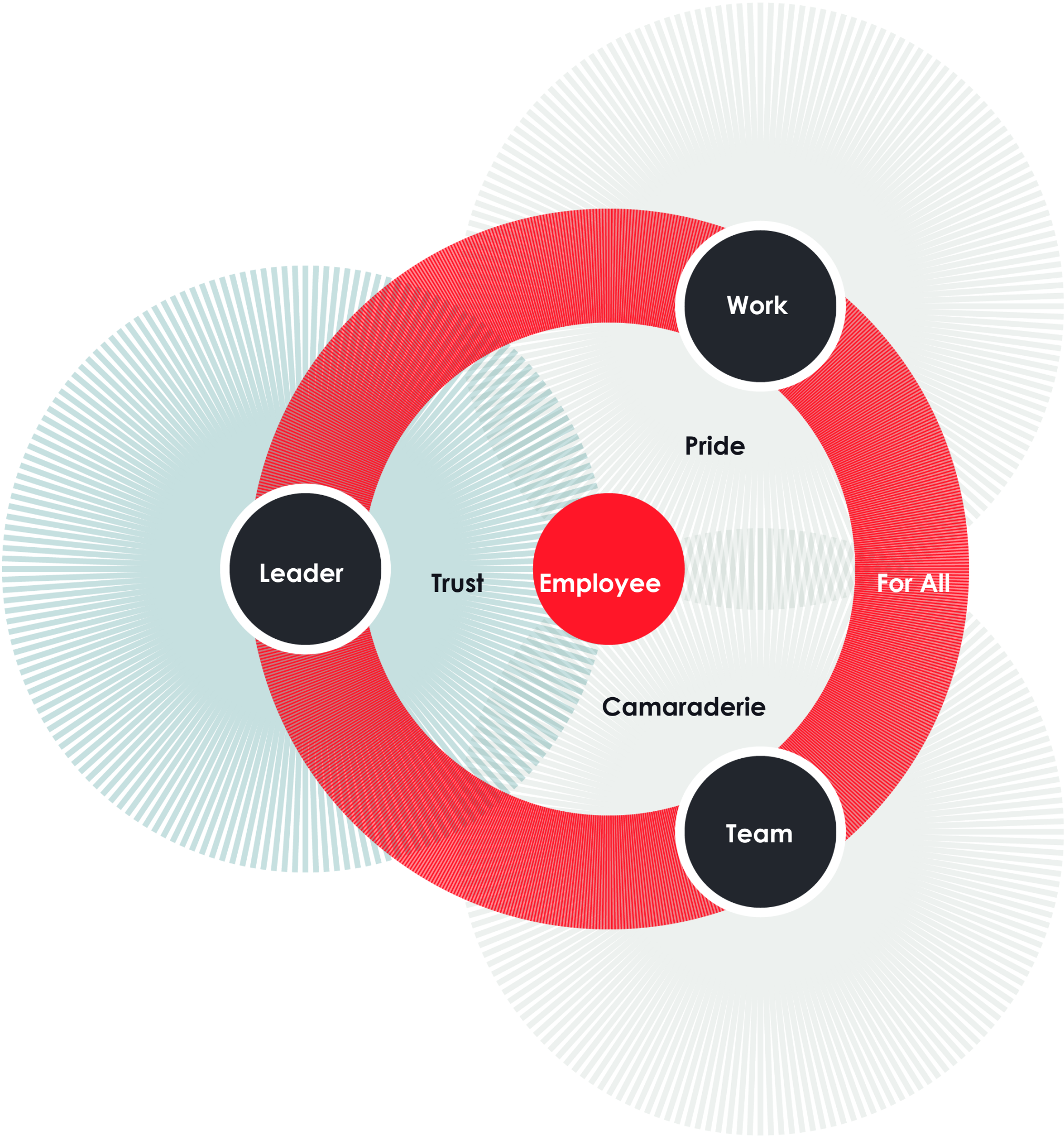
Action plans help leaders across the company have a clear understanding of what their priorities are, and what they can do to address those areas. Without action plans, organizations often see inconsistent results.



Action plans are also essential to "closing the loop" on your Trust Index survey with employees. When employees see that their feedback has led to specific actions that improved their experience, it builds trust by showing that leadership listens to them and cares about their experience.

A great workplace is defined by trust, pride, and camaraderie for all.

A great workplace is one where employees trust the people they work for, have pride in the work they do, and enjoy the people they work with. And that experience must be consistent for every employee, no matter who they are, what they do, or where they work.

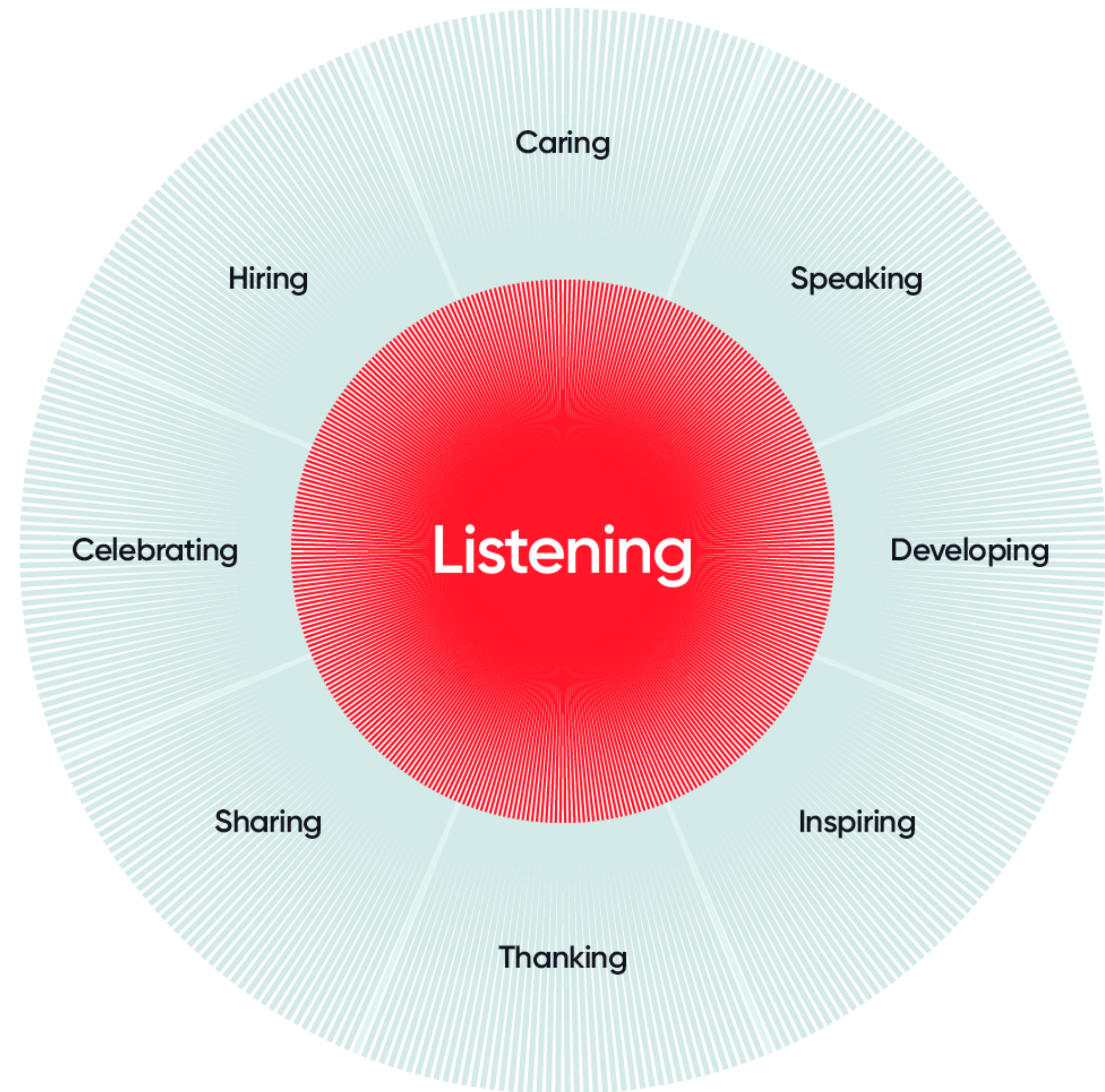


High Trust Leadership

Great Place to Work's research has identified nine key behaviors that For All leaders use to build authentic high-trust relationships with their employees.

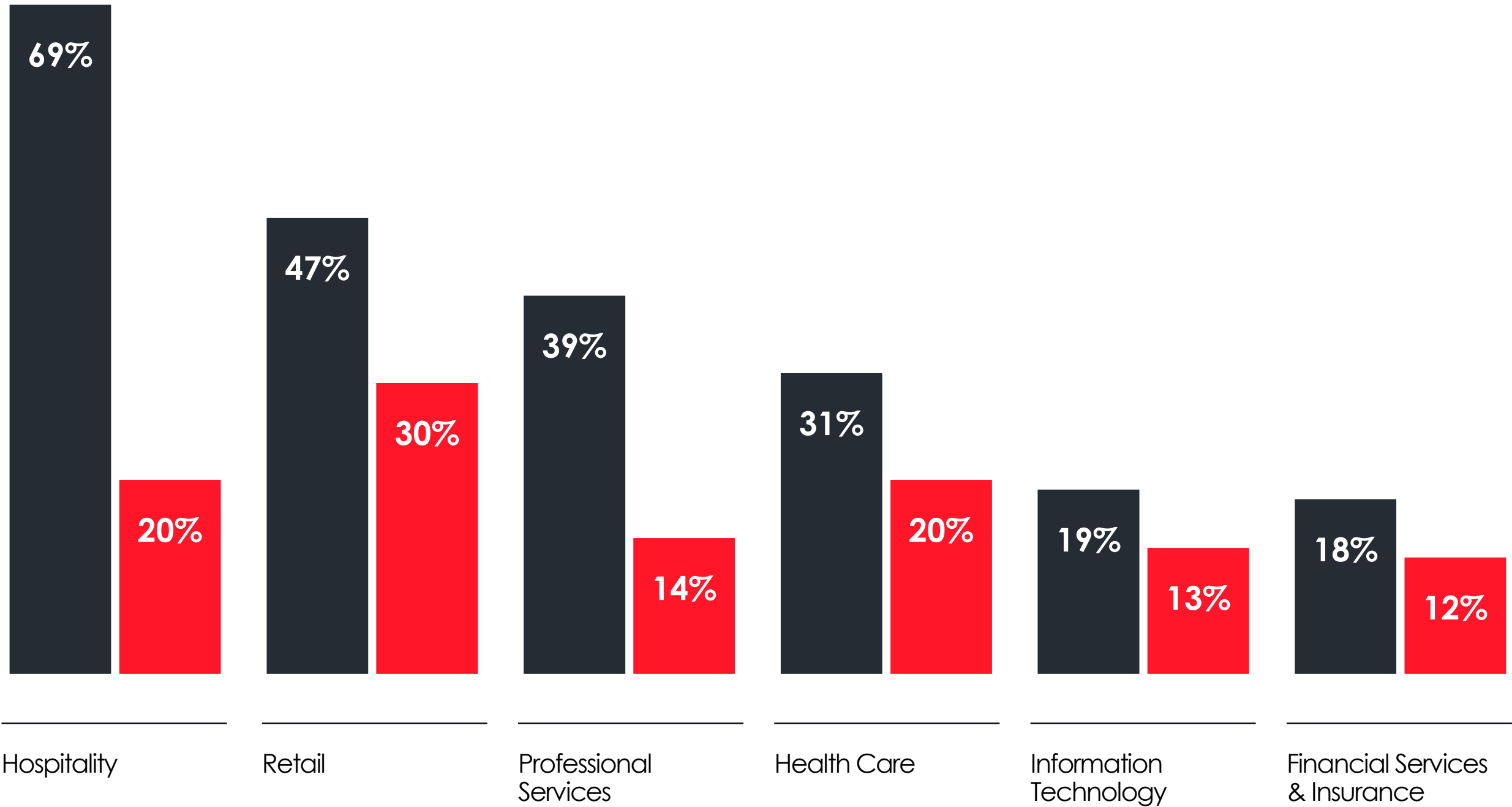
Listening is the most important of those behaviors, because the others are so difficult to do well for leaders who don't also listen well.

Leaders show employees that they're being listened to by taking action on their feedback. That's why action plans are important not just for the company as a whole to build, but also for individual leaders to participate in.



Great workplaces keep their best people.

Creating an Action Plan and sharing results with employees can boost employee retention by fostering a transparent, goal-oriented environment where employees feel valued, heard, and engaged.



Voluntary Turnover By Industry

Average Workplaces Certified Companies

Source: Great Place To Work and 2023 U.S. Bureau of Labor Statistics

Who Oversees the Action Plan?

Once you have established your 'from what to what by when', it's up to all employees to ensure goals are met. Ultimately, it is helpful to have one person really driving the process and that can be the CEO, a senior leader, a representative from human resources or it could be a growth opportunity for an employee. Just as the Action Plan itself will be unique to your organization, so will the ownership.

Where Does the Action Plan Live?

The most successful Action Plans are translated into individual goals and actions for leaders and employees. To manage these effectively, embed them into your organization's regular goal-setting platform.

Key Considerations:

- **Transparency:** Host the plan on a shared drive or platform for visibility
- **Sensitivity:** If Sensitive, keep it with designated owners

How do you create an Action Plan?

To effectively implement survey-driven changes, follow a structured approach that engages leaders and employees at every level. Your critical next step is to **digest this information, reflect and share your response back with your employees – and then take action**. The action you take will depend on many factors, including the role of culture in supporting your business strategy, what other data you collect, other ongoing initiatives etc.

Here's how you can make it happen:

- Begin with a CEO communication sharing high-level results, thanking employees, and outlining next steps.
- Leaders at all levels should discuss results openly with their teams, focusing on relevant details and encouraging dialogue.
- After the cascade, involve employees in action planning and have them present their recommendations to senior leadership for approval.

A decorative graphic consisting of four red squares of varying sizes arranged in a stepped pattern in the top right corner of the slide.

7 Steps to a Solid Action Plan

7 Steps to a Solid Action Plan

1. Review

Thoroughly review survey results. Focus on trends, common themes, and areas with the highest, lowest, and most divergent scores from Great Place To Work benchmarks.

2. Identify

- **Understand drivers and trends:** Start with the overall highlights, **then review verbatim comments for context. Numbers show the “what”; comments reveal the “why.”**

3. Define

- **Understand results in context:** Consider recent decisions or changes that could influence results. Compare with other data sources for similarities and differences.

4. Outline

5. Assign

Assess individual departments (if applicable) to decide whether to create leader-specific action plans or a broader plan for the entire organization.

6. Communicate

7. Evaluate

7 Steps to a Solid Action Plan

1. Review

Identify key strengths and opportunities, prioritizing them based on impact and significance.

2. Identify

- How can you connect your survey results to your organization's values in an effort to achieve the desired company culture and help accomplish your mission?
- How can you use employee input and feedback to best narrow down the one or two main areas that are both actionable and will have the greatest impact? What does “great” look like in these areas?

3. Define

4. Outline

5. Assign

Create a Payoff Matrix with investment on one axis and ease of implementation on the other. Consider risk, reward, and time horizon. Focus on issues that matter most to the business and employees and where the team can make a difference.

6. Communicate

7. Evaluate

7 Steps to a Solid Action Plan

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Share results with the Executive Team first. Since results reflect the employee experience with the overall organization, it is the CEO and Executive Team whose response is most critical (and whose response is most impactful for the organization.) We recommend this team see the results first – preferably through a presentation and discussion of storylines and data themes.

Share results with mid-level leaders. A cascaded approach to disseminating the results can work well, particularly if managers are given the data that pertains to their area, and the coaching/support to understand the results, building on strengths and improving opportunity areas.

Set clear, strategic goals with a "from what to what by when" statement. Ensure objectives are SMART: specific, measurable, achievable, relevant, and time-bound.

7 Steps to a Solid Action Plan

1. Review

Detail specific steps, responsibilities, and timelines for achieving the goals. Involve key contributors. Use last year's action plan as a starting point, updating it with new goals or continuing where needed.

2. Identify

Plan to respond to employees. Work with leadership to communicate results back to the organization.

3. Define

4. Outline

5. Assign

6. Communicate

7. Evaluate

7 Steps to a Solid Action Plan

1. Review

Clearly delegate responsibilities for execution — identify whether it's managers, executives, HR, or others.

2. Identify

- **Keep in mind for communicating results:** It is particularly impactful if leaders respond personally and commit to any changes they are planning to make based on survey results.

3. Define

4. Outline

5. Assign

6. Communicate

7. Evaluate

7 Steps to a Solid Action Plan

1. Review

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Communicate next steps to employees, including how their feedback will be used and any opportunities for involvement. Set a regular update cadence, so employees are informed of progress before the next survey.

- Determine what form of organization-wide communication do you plan to use to share high-level results, thank employees for their participation, and commit to taking action.
- Consider how you can facilitate far reaching, in-depth conversations to gain more specific insights and make meaningful improvements across the organizations.

7 Steps to a Solid Action Plan

1. Review

Align with Priorities: Ensure updates reflect business priorities

2. Identify

Share Consistently: Make regular updates a core part of your Action Plan. Distribute updates to your team alongside the corporate scorecard

3. Define

Communicate to Leadership: The plan overseer should provide updates to the CEO for Town Hall meetings and other corporate communications.

4. Outline

5. Assign

6. Communicate

7. Evaluate

Tips for Success: Key Pitfalls to Avoid

Looking at the lowest statement scores and immediately jumping into action to ‘fix’ things.

Not aligning employee survey feedback with your business priorities.

Assuming the plan will address all employees’ needs.

Using the recency effect to try to explain away results and not looking into them further.

‘Boiling the ocean’ - over-committing and taking on too many priorities.