

5 Steps of Action Planning



1-REVIEW

NOVEMBER - DECEMBER 2023

Managers read their survey reports and prepare for a team discussion.

- Review your survey results.
- Share survey results with your team.
- Prepare a team meeting to discuss.



2-DISCUSS

JANUARY - MARCH 2024

Managers meet with team to discuss results and learn how the team views engagement.

- Explain “why” UTA conducted the survey.
- Review key concepts of engagement.
- Discuss the survey results.
- Ask your team to name strengths and opportunities for improvement.



3-SET GOALS

JANUARY - MARCH 2024

The team prioritizes Action Items, sets goals and develops an Action Plan.

- Prioritize 2-3 focus areas to explore further.
- Brainstorm Action Ideas and select the specific actions the team will take.
- Create team engagement goals.
- Complete an Engagement Action Plan and establish follow up dates.



4-ACT

APRIL 2024 - SEPTEMBER 2025

The team makes engagement a priority.

- Share the Action Plan with team members.
- Include engagement as a regular agenda item for team meetings.
- Encourage and support employees to participate in engagement activities.



5-EVALUATE

QUARTERLY

The team regularly follows up on goals to recognize progress and achievements.

- Establish a follow-up schedule for Action Plan goals.
- Recognize success — big and small.
- Revise the Action Plan as needed.