A Two-Group Approach to Action Planning

**Methods Used:**

**Standard approach**
- Utilize the steps as described in the process below

**Interdisciplinary Teams Approach**
- This approach is used for teams who individually do not have enough data in the Scorecard to effectively conduct action planning
- Utilizing the steps below, pull workgroups together utilizing the data found at the lowest unit which is common between the two workgroups (i.e. a small workgroup within Ambulatory Care could work with a similar workgroup in Ambulatory Care using the overall department data to conduct action planning)

**Small Cohorts within a Larger Group**
- This approach is used for teams with a large amount of employees and/or multiple shifts which will require more than one action planning session
- Utilizing the steps below, workgroups may decide to conduct action planning during a day shift and a night shift or may choose to break down large teams into more than two groups to foster increased participation
- This approach requires numerous action-planning sessions to ensure that all employees are afforded the opportunity to provide input into the discussion

**Process:**

**Step 1: Discuss**
- Discuss Engagement – Ask your team members to talk about the best moment they have ever had at work
- Provide results and help your team understand how to read the Scorecard
- Do not interpret results for your team; it is their interpretation that is most important
- Discuss sources of engagement and disengagement beneath the numbers using percentage of 5s, percentage of 1s, level-over-level, and meaningful differences (.1 for groups over 1000 and .2 for groups under 1000)

**Step 2: Select**
- Divide your Team into 2 Groups
- Ask Group 1 to select a relatively low scoring item from any of the Q12 questions *(3 minutes)*
- Ask Group 2 to select a relatively high scoring item from any of the Q12 questions *(3 minutes)*

**Step 3: Plan**

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- Ask each Group to brainstorm and write down Barriers to their chosen Engagement Element (5 minutes)
- Ask each Group to brainstorm and write down Potential Action Items to attack those Barriers. Emphasize that these action items must be within the team’s Span of Control (5 minutes)
- Ask each Group to vote on and choose 2 Action Items to pursue (for a total of 4)
- Ask each Group to take 10 minutes to modify one of their chosen Action Items until they meet the SMARTS criteria. Repeat this step to address the other action item
- Ask each Group to report out their modified Action Items to the other Group and solicit feedback and buy-in
- Document the finalized Action Items

**Step 4: Continuous Follow-up**
- In existing monthly meetings, have a reoccurring agenda item that takes no more than 10 minutes to:
  - Pass out a copy of the Action Plan
  - Ask the Team: “Did we do what we said we were going to do?
  - Ask the Team: “Did it make any difference whatsoever?”
  - Modify and change the Action Plan as necessary