Engagement Action Planning Checklist

1. **ANALYZE.**
   Carefully read your survey results. Your goal is to interpret the results and gain preliminary insight into your team’s story.
   - Review your survey results.
   - Prepare your meeting agenda for the Engagement Talk.
   - Select a date, time and location. About one hour for the first meeting.
   - Prepare materials; including a copy of the Q12™ survey results for each team member.

2. **SHARE AND LEARN.**
   Meet with your team for an Engagement Talk. Share survey results, discuss, and learn how your team views engagement.
   - Explain “why” we conducted the survey.
   - Review key concepts of employee engagement.
   - Distribute and explain the Q12 survey results.
   - Discuss the results: “What does each Q12 item mean to our team?”

3. **COLLABORATE.**
   As a team, set goals and develop organizational and team action plans to improve engagement.
   - Discuss which Q12 items the team should focus on.
   - Identify team performance goals.
   - Brainstorm action ideas to improve engagement.
   - Complete Engagement Action Plans for the organization and team goals.
   - Identify when you will review progress.

4. **VISIBILITY AND FOCUS.**
   Make focusing on engagement part of the team’s daily routine to foster a work environment that creates an engagement story in which everyone matters.
   - Develop team guidelines to stay focused on engagement.
   - Post the Action Plans and team goals in a spot visible to all team members.
   - Make engagement a priority and constant focus.

5. **SPOTLIGHT.**
   Regularly follow up on team goals and shine the spotlight on success.
   - Establish a regular schedule for follow-up to the Action Plans.
   - Evaluate progress on the team’s goals.
   - Recognize success — big and small.
   - Review and recalibrate as needed.
**Plan Name:**

<table>
<thead>
<tr>
<th>OUR PLAN</th>
<th>FOLLOW UP 1</th>
<th>FOLLOW UP 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>This is what we will do:</td>
<td>Date: This is the progress we have made:</td>
<td>Date: This is the progress we have made:</td>
</tr>
<tr>
<td>This is what success will look like:</td>
<td>We have made this additional commitment:</td>
<td>We have made this additional commitment:</td>
</tr>
<tr>
<td>These people will be involved:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>We should see clear progress by this date:</td>
<td>We will review progress again on this date:</td>
<td></td>
</tr>
<tr>
<td>We will review progress:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Which Q12 item are we focusing on:**
- [ ] Strength
- [ ] Opportunity

**Team Performance Goal we hope to impact:**