Crowdoscope

Action Planning Guide

Crowdoscope

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Introduction

Why is Action Planning Different with Crowdoscope?

Action Planning is the process used to address opportunities for improvement identified by research. It refers to the tasks and processes involved in bringing about change.

The process of Action Planning in response to employee feedback is so important because just asking employees for feedback is not enough – something needs to happen in response. It is also crucial to involve employees in the process of responding to the findings (the "action planning") because it provides reassurance that their views are important. Thinking about Action Planning in advance also provides a framework for acting in response to research findings.

Crowdoscope makes action planning a lot more effective because it has the capability to produce tangible and community-validated suggestions to act upon. Participants suggest, and identify, the most effective actions collectively. The result is that senior managers don't need to spend time trying to interpret data in terms of what should actually be done. This is already done collectively by the participants.

A typical action planning cycle consists of three stages: Evaluation, Planning and Implementation.

1. **Evaluation**: In this stage, the issues present within the organisation can be diagnosed and the causes of these issues can be identified. This is when Crowdoscope can be used to either further diagnose issues or offer crowd-sourced solutions to problems.

2. **Planning**: This stage involves prioritising the solutions identified in the evaluation stage. Quick-wins can be actioned immediately, whereas more complex issues to address can be clarified through various action planning activities (see below).

3. **Implementation:** Now that the issues have been identified and the ways these can be resolved have been considered, action can be taken. This involves adequate communication with regards to the allocation of resources and who is accountable for each initiative.
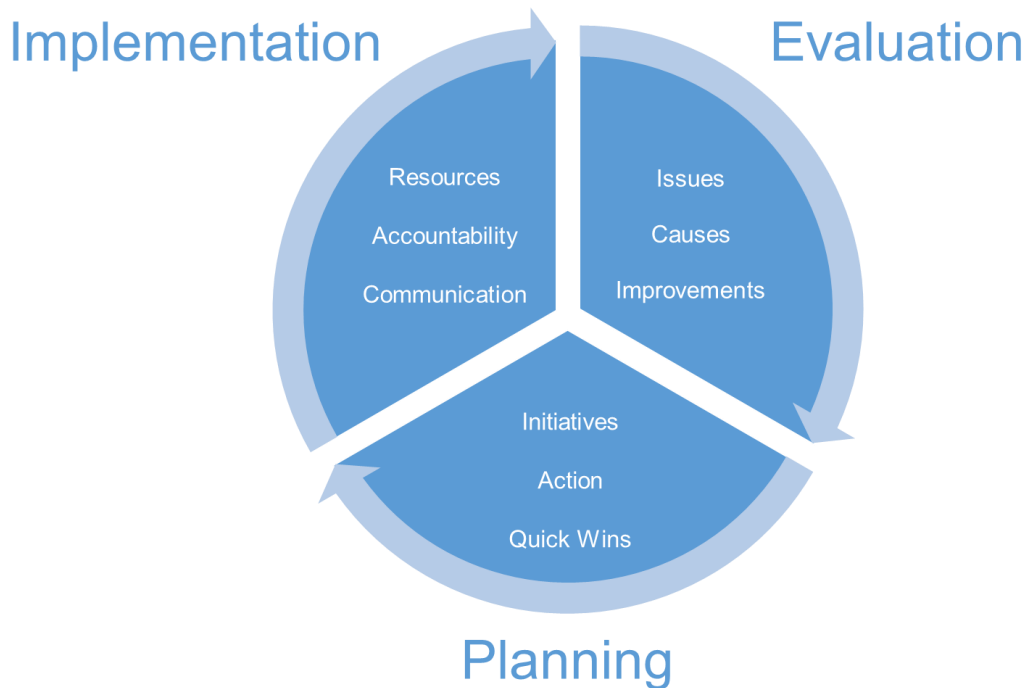
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Implementation

- Resources
- Accountability
- Communication

Evaluation

- Issues
- Causes
- Improvements

Planning

- Initiatives
- Action
- Quick Wins

Figure 1 - The Action Planning Cycle

Barriers to Action Planning

There are significant barriers to consider when undertaking action planning within an organisation:

- **Convincing managers**: Some managers may still need convincing of the benefits of acting on feedback.

- **Paralysis by analysis**: Conducting endless analysis without actually doing anything in response wastes time and resources.

- **Procrastination**: Spending too much time discussing, interpreting and explaining results away detracts from the implementation of positive changes.

- **The wrong focus**: Focusing too much on the numeric scores, benchmarks and targets when the focus should be on acting, implementing and bringing about change.

- **Lack of resources**: Implementing new policies, procedures and activities takes time, money and resources. All of these need to be considered before action planning.

- **Trying to do too much at once**: It is important to focus on a few important actions at a time rather than trying to solve every single issue that is identified.

- **Lack of accountability**: Not assigning actions to people and following up can create a diffusion of responsibility which means that things don't get done.

- **Competing priorities**: Often organisations have competing priorities that detract from action planning. Try to ensure action planning takes place when decision makers, and the organisation generally, are available to implement change.

Action Planning Using Crowdoscope

Generating Insights

It is best to think about Action Planning from the start and create a Crowdoscope that is solutions-focused. For example, by asking for suggestions or ideas about how something could be improved. All Crowdoscope projects are based around one open-ended 'discussion' question (For example, "What could be done to improve your experience of working at XYZ?").

The advantage of using Crowdoscope over a traditional survey for action planning is that participants are able to rate other people's suggestions and ideas according to two evaluation criteria (see the section below). In this way, the best ideas and suggestions bubble to the surface. These comments can then be grouped into topics based on the various themes uncovered within participants' individual suggestions.

Considering Additional Metrics

Once topics have been identified, there are various metrics that can be used to provide an understanding of how important each of these topics are. These metrics can include (but are not limited to):

- The frequency with which people are mentioning them. The more people that are mentioning an issue or offering a suggestion, the more important something is to implement.
- How people are rating the topics according to each of the evaluation criteria.
- The attitudes of the people who are mentioning a particular issue (e.g. whether people are satisfied or dissatisfied).

Evaluation Criteria

The evaluation questions are the means by which participants rate each other's ideas and suggestions. It is important to come up with sufficiently different evaluation criteria that provide decision-makers with the required information about issues or suggestions for action. For a list of commonly used evaluation criteria please see the Crowdoscope Manual.

When thinking about Action Planning, the following evaluation questions can be especially useful:

- How actionable is this? (Not Actionable vs. Very Actionable)
- How much of a priority is this to address? (Low Priority vs. High Priority)
- How easy is this to implement? (Very Difficult vs. Very Easy)
- How important is this issue? (Not Important vs. Very Important)
- How big a challenge is this? (Not a Challenge vs. Huge Challenge)

Taking Action

What sort of actions can be taken?

There are several directions that can be undertaken when implementing the findings of a Crowdoscope:

- **Improve**: You can improve something. Improving the organisation should be a top priority for all leaders.
- **Change**: You can change something. The implementation of transformational change initiatives that require new ways of doing things or the implementation of new systems and processes is known as "quantum leap".
- **Communicate**: You can communicate something. Communication during action planning should be clear. Employees will want to know what is being done to address the range of issues that they will have identified in the Crowdoscope.
- **Investigate**: You can investigate something. Make sure that all the options available to the organisation have been identified and properly researched. This might include predicting the outcomes, researching costs and availability of resources and time. Investigation could also involve piloting new initiatives in small areas of the organisation to see how they work before rolling them out across the entire organisation. This process is known as "practice fields".
- **Maintain:** You can maintain something. Just because people are focusing on one or several aspects of the organisation that need improvement, this does not mean other areas should fall in their standards. Make sure the strengths that are already present are reinforced.
- **Nothing**: You can do nothing. If nothing can be done about an issue that has been identified, explain why. Acknowledging that an issue cannot be resolved is better than ignoring it entirely.

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Crowdoscope Action Planning Exercises

In this section, we highlight three exercises that can be undertaken in order to decide which suggestions should be acted upon. By this stage there should be some validated themes/suggestions from Crowdoscope and it is now up to the decision-makers to commence actioning these. The following exercises have been designed by Crowdoscope in order to prioritise and evaluate which suggestions should be actioned.

Exercise 1: Prioritisation

This exercise is designed to identify and prioritise actions to be implemented. For this exercise, the following are required: Top 20 suggestions printed on labels or pieces of paper, somewhere to stick these suggestions and something to stick them with (e.g. tape, Blue-Tac).

Please follow these steps for this exercise:

1. Create a space (e.g. a whiteboard) where the printed suggestions can be placed and draw the chart shown below which shows Impact vs Ease of Implementation.

Ease of Implementation

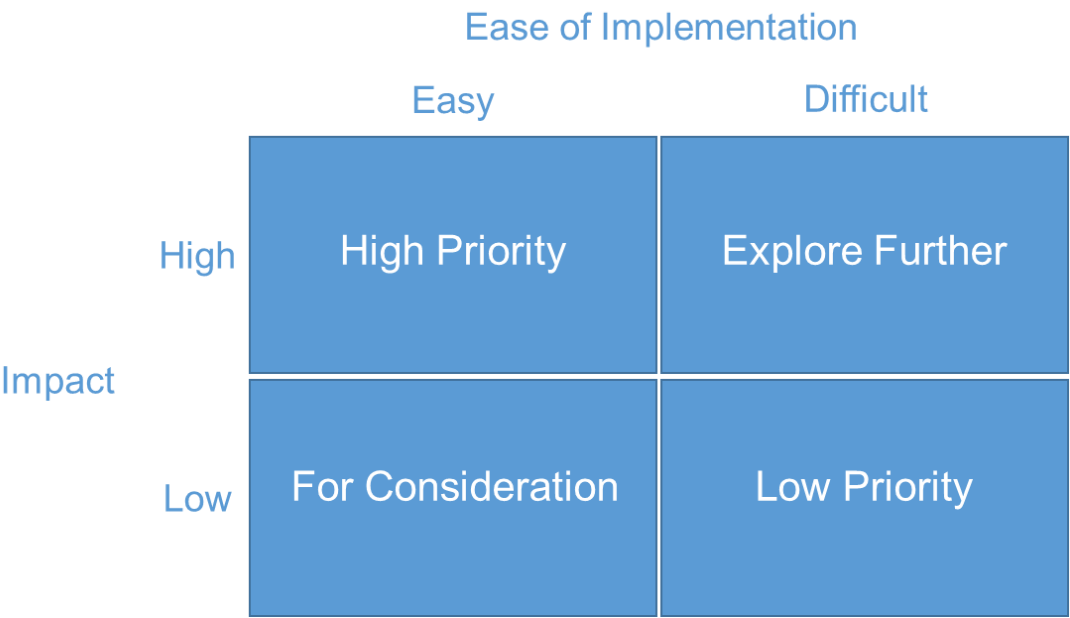|	Easy	Difficult
High	High Priority	Explore Further
Low	For Consideration	Low Priority

(Impact labels the vertical axis)

Figure 2 - This chart can help identify what suggestions are considered "High Priority" and which ones are not.

2. Working as a team, take each suggestions in turn and place the suggestions on the chart. If there is conflict about the placement of a suggestions, put it aside and revisit it at the end.

3. Once all the suggestions have been placed on the chart it should be apparent which ones will have the greatest impact and will be the easiest to implement.

4. Take the suggestions in the Top Left Quadrant as "quick-wins". These are easy to implement and are likely to have a significant impact.

5. In terms of moving forward with these suggestions (allocating resources and accountability for the actions), Exercise Two within this guide can help. It will also get teams thinking about actions in more detail, as well as what's involved in implementing them and any challenges that they might face.

Exercise 2: Exploration

Now that the suggestions and ideas have been prioritised, there may be suggestions that need further exploration. The decision tree, which is based around the two dimensions of control and understanding, will refine what is already known.

The decision tree follows these steps:

1. A suggestion is selected within the team and it is decided whether the issue highlighted is within the team's control and whether it is fully understood.

2. If the issue highlighted in the suggestion is completely understood and completely within the team's control then an action plan would be put into place and the following can be decided:

   - What the action will be
   - The target or success measure
   - Who is accountable for this action
   - What the review process will be

3. If the issue highlighted in the suggestion is understood but not within the team's control, then the people in control of this issue must be notified and given all the available information. Once a communication channel has been opened and the relevant people are informed, they can then continue with the action plan in the same manner as Step 2.

4. If the issue highlighted is not fully understood it would be worth conducting further data analysis or research to try and understand this issue. You could even run a further Crowdoscope around this issue. Once the issue is better understood, the team can proceed with the instructions in Step 2.

The decision tree below is good framework from which a team in charge of the action planning process can use:
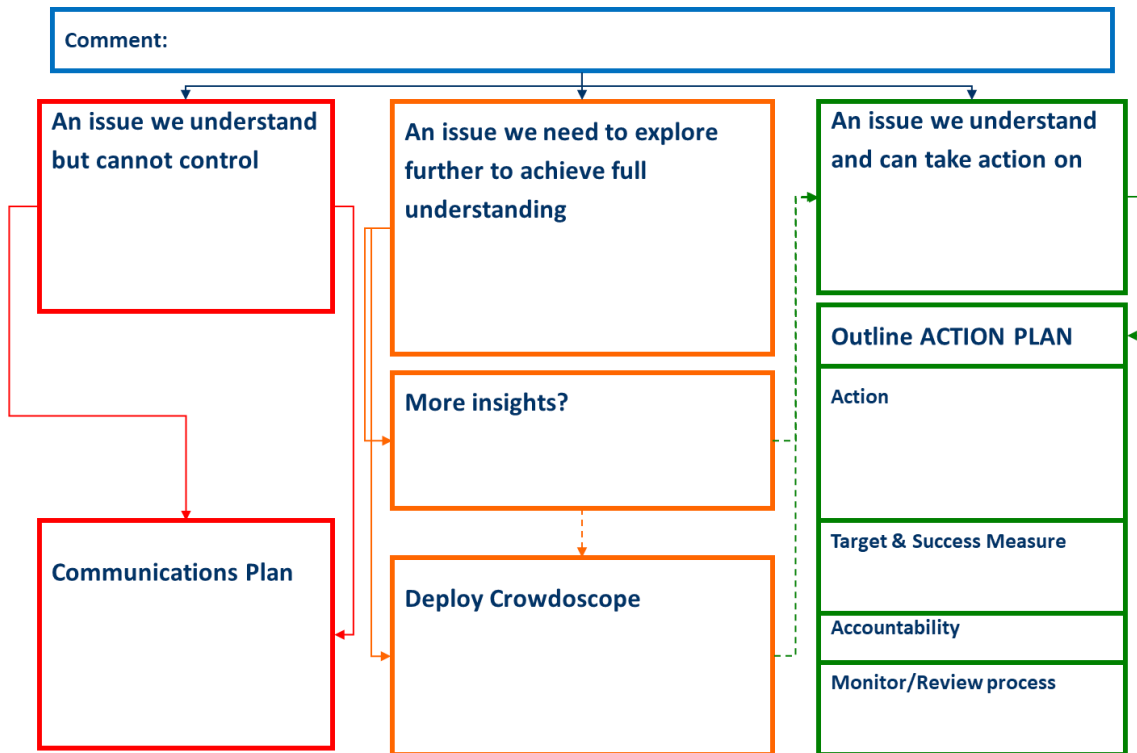
Figure 3 - The decision tree can be used to help understand comments/suggestions further

Here are some important points to consider when working through the decision tree exercise:

- **Accountability:** A person (probably a senior manager) should be accountable for the final outcomes of the action planning. They will oversee the signing off and actions and monitor the progress. Whilst managers at various levels of the organisation receive the information, interpret it and feed it back to the senior leadership, it is these senior leaders that are accountable for the decisions that impact all employees.

- **Timetable:** A clear timetable needs to be established highlighting the timeline for the proposed changes, the deadline that these changes need to be undertaken by and when the review process will be.

- **Success:** It is worth conducting another Crowdoscope in 6 or 12 months' time to get an understanding of the impact changes have had. The success of the action planning will then be apparent.

There is one last crucial exercise that all managers and decision makers should undertake during the action planning process in order for it to be undertaken effectively.

Exercise 3: Communication

The importance of communication has been stressed in this guide already but there are various ways information can be communicated/shared amongst members of an organisation. It sends a bad signal if people who are involved in highlighting issues are not provided with the outcomes of the Crowdoscope.

Immediately after the Crowdoscope has closed and employees have submitted their suggestions, thank them for participating. Moreover, employees should be informed of the initial results and told how the action planning process will work moving forward.

The next step in the communication process is to share the results of the Crowdoscope in full. It is crucial to be fair and honest when communicating results and avoid only sharing "positive" results. Acknowledging (and addressing) negative results will gain credibility and respect for senior leaders in an organisation.

Moving forward onto the action planning process, senior leaders should communicate amongst themselves to ensure that they are all on the same page and supportive of and changes that will take place. Departmental and Line Managers should also be adequately informed of these changes so that they can then communicate how these changes will affect their teams. Keeping managers informed also means that they can answer any questions that might arise.

Ongoing communication should always continue because it helps drive accountability. When employees are reminded of promises that were made and goals that were set, the people responsible for delivering on those promises are more likely to follow through.

Finally, conduct short Crowdoscopes every few months to check if progress with certain issues has been made. This allows senior leaders to know how much more work has to be undertaken.

Action Planning - Things to Remember

1. Focus initially on high impact, quick and easy actions that can make genuine changes to an organisation.

2. Involve people at all hierarchical levels.

3. Communicate results and achievements.

4. Have a plan and timetable for implementing changes.

5. Ensure accountability by being clear about who is responsible.

6. Focus on the action planning process and don't get side-lined by numbers.

7. Keep it simple. Don't overcomplicate the action planning process.

8. Clarity. Make sure actions are clear and the communication with others is clear and precise.

9. Measure your success.

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