# Table of Contents

Summary................................................................................................................................. 4

My Plan Status .......................................................................................................................... 5

My Plan Associations ............................................................................................................. 6

Recent Action Plan Activity .................................................................................................... 6

My Action Plans ....................................................................................................................... 7

Filtering Plans .......................................................................................................................... 7

Reviewing and Editing Plans ................................................................................................... 7

Changing a Plan’s Status .......................................................................................................... 8

Exporting Plans ......................................................................................................................... 8

How To Create a New Action Plan ........................................................................................... 9
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The initial page of the Action Planning product is the Summary page. This page provides an overview of your action plan activity, allowing you to quickly assess the status and activity of your action plans.

On the right side of the page, click **New Action Plan** to create a new action plan. See page 9 for more information about creating an action plan.

The Summary page consists of three areas:

- My Plan Status
- My Plan Associations
- Recent Action Plan Activity
MY PLAN STATUS

This area indicates the number of action plans you have created and their distribution among the different statuses. Use it to quickly determine how many of your plans exist for each status type. A plan can have one of the following statuses:

- **Draft**: You started to create a plan, but have not activated it yet.
- **Active**: You activated the plan, and your team is currently using it.
- **Complete**: The plan was active, and you marked it as complete.

Click **View Plans** to view all plans on the **My Action Plans** page.
MY PLAN ASSOCIATIONS

This area lists the business problems and engagement items associated with your active and completed plans. Click the **Active** tab to view the associations for your active action plans. This will give you a general understanding of the focus of your active plans. Click **View Active Plans** to view all active plans on the **My Action Plans** page.

Click the **Complete** tab to view the associations for your completed action plans. This will give you a general understanding of what your plans have focused on in the past. Click **View Complete Plans** to view all completed plans on the **My Action Plans** page.

RECENT ACTION PLAN ACTIVITY

This area provides a snapshot of your recent action plans. It indicates which of your active plans have a past due date, which of your active plans have an approaching due date and which plans you recently modified. Use this area to quickly identify plans that require your immediate attention.
MY ACTION PLANS

The **My Action Plans** page displays all action plans that you have created. Use the features on this page to filter, review, edit, manage, export and delete your plans.

**FILTERING PLANS**

Use the options in the **Filter by** row to select criteria for determining which plans appear on the page.

- **Plan Status**: All action plan statuses. Click a status to filter your plans.
- **Business Problem**: All business problems that you can associate with an action plan. Click a business problem to filter your plans.
- **Associated Items**: All engagement items that you can associate with an action plan. Click an item to filter your plans.

You can use any combination of filter criteria to isolate the plans you want to view. The following criteria are available:

You can also use the search field on the right side of the row to locate plans with a specific word or phrase in their title.

Filter criteria currently in use appear below the **Filter by** row. Click an item’s close symbol (x) to remove the item from your current filter. Or, click **Clear All** to remove all filter criteria items.

**REVIEWING AND EDITING PLANS**

By default, plans on the **My Action Plans** page display their title, modified date and due date. Active plans also indicate the number of days they have been active, while completed plans indicate the date you marked them complete. Click a plan to expand it and display its remaining information, including the questions and
notes regarding the plan, any associated business problems, any related engagement items and any added learning tools.

To edit an action plan, expand it and then click its Edit button. This will display all fields associated with the plan, allowing you to edit any of its details. See page 9 for more information about an action plan’s various fields. Click Save after you finish editing the plan.

NOTE: You cannot edit a completed action plan.

To delete an action plan, expand it and then click its Delete button.

CHANGING A PLAN’S STATUS
The My Action Plans page also allows you to easily change the status of an action plan. A plan can have one of the following statuses:

- **Draft**: You started to create a plan, but have not activated it yet. To activate the plan, expand it and click its Activate Plan button.
- **Active**: You activated the plan, and your team is currently using it.
- **Complete**: The plan was active, and you marked it as complete. To mark an active plan as complete, expand the active plan and click its Mark As Complete button.

NOTE: If you accidentally mark a plan as complete, you can reactivate it by expanding the completed plan and clicking its Reactivate Plan button.

EXPORTING PLANS
To export your action plans, click Export Plans on the right side of the My Action Plans page. The application will prompt you to download a comma-separated values (CSV) file containing a list of your plans, which you can open with the spreadsheet program of your choice (e.g., Microsoft Excel).

NOTE: The application will export only the plans that appear on the My Actions Plans page. In other words, if you are using any filter criteria on the page, the application will not export those plans that do not meet the filter criteria.
HOW TO CREATE A NEW ACTION PLAN

1. On any of the Action Planning product’s pages, click New Action Plan on the right side of the page. This will display the New Action Plan window.

![New Action Plan window]

2. Enter the details of your plan in the New Action Plan window, which consists of the following fields:

**Plan Name**
Type a concise description to identify your plan. This field is required.

**What will we specifically do, by when, by whom, and with what tools/resources?**
Type specific actions and activities that will take place to complete the plan. Indicate specific deadlines and individuals responsible for completing the plan, as well as the frequency of how often individuals will perform the actions and activities. If your plan requires specific tools or resources to successfully complete it, include them as well.

**How will this plan impact the financial results of the organization?**
What are the goals of your plan? Type a description of how the successful completion of your plan will help the organization overall.

**What does success look like?**
Type the benefits and goals of a successfully completed plan in the field. These are the tangible or obvious outcomes of the plan.

**Notes**
If there is any additional information about your plan that the other fields do not cover, include it here.

**Due**
Click this field to display the date selection calendar. Use the calendar to choose a date by which your team should complete your plan. This field is required.
Select a business problem we are trying to solve.
Add a maximum of three business problems to indicate the general goals of your plan. Use the drop-down list to choose from a list of predefined business problems. Alternatively, use the text field to create your own business problems. After adding business problems to your plan, click Done Adding.

NOTE: You can add both predefined business problems and your own created ones to your action plan. But in total, you cannot exceed three business problems per plan.

Associated items that are related to this plan.
Add a maximum of three engagement items to indicate the engagement goals of your plan. Use the drop-down list to choose from the available engagement items. After adding items to your plan, click Done Adding.

NOTE: Only the Plan Name and Due fields are required.

3. After entering the details of your action plan, click Create Action Plan or Save As Draft.

Create Action Plan You are satisfied with the details of your plan and want to activate it immediately.

Save As Draft You want to edit the details of your plan later, or you want to activate it in the future.