

ACTION PLAN TIPS

Tips for writing effective action plans: Remember the development of an action plan is a collaborative effort between an employee and manager.

Identify the issue or opportunity

- What is the issue or opportunity identified? Be specific – behavior, performance issue, or policy violation.
- What has been directly observed by management? What feedback has been provided to management by others?
- What is the impact of the behavior?
- What performance indicators are available?
- Drill down – What are the specific behaviors that are causing the issue?

Examine previous conversations

- What expectations have already been set?
- Does the Employee have the skills/tools to perform their duties?
- What communication has taken place with the employee or what steps has the manager taken to assist the employee in addressing the opportunity?
- What is the employee's feedback or perspective as to why they are not performing?
- What do they see as the biggest obstacles?

Discussing issue or opportunity

- Set uninterrupted time aside to talk with the employee.
- Communicate in a positive manner to establish the purpose of the discussion is to help them succeed.
- Provide the employee the 'S.M.A.R.T.' Goals Tip sheet to review prior to the meeting.
- Communicate expectation of employee ownership of their development and as their manager you will help them establish an improvement plan. This is a collaborative effort!
- Describe ideal outcome and what will happen if nothing changes.
- Focus on specific behaviors – A measure of success can be numeric results.

Creating the action plan

- Establish 'S.M.A.R.T.' goals and action steps in writing. (refer to SMART Goals Tip Sheet)
- Be specific – What must the employee do or stop doing to change the behavior.
- Solicit from employee what resources they feel would be most useful for them in their development.
- Managers should also identify resources as appropriate (training material, mentor, etc.).
- Manager's commitment to providing feedback to employees. (ex. Weekly 15-minute meeting to discuss progress every Thursday at 2pm)
- Both manager and employee sign and date action plan.

Follow up

- Don't wait to follow up – Plan to discuss progress on action plan as often as possible.
- Follow up on specific behaviors as identified in the action plan.
- Observation of behaviors by managers – Are they performing what is asked?
- Review Key Performance Indicator (KPI) Reports.
- If performance is not improving, formal corrective action (Canada – a.k.a. counseling process) may be appropriate. Please contact Employee Relations at the [e-Service Portal](#). The portal can be accessed via My Personal Desk>HR Solutions.