

Team Engagement Action Planning

Process Checklist

Use this process checklist to prepare and hold team engagement action planning sessions.

Getting Ready

1. Review last year's engagement action plan—including goals, tactics, and outcomes.
2. Review your team's Gallup results at Gallup Access.
3. Identify key insights:
    - What has improved since last year?
    - What declined?
    - How do results align with last year's engagement action planning goals?
    - What themes stand out in open-ended comments?
4. Choose key insights to share with your team.
5. Meet with your Engagement Ambassador.
    - Schedule two meetings, at least one week apart.
    - Choose your preferred format: in-person or online.
    - Decide on report format: digital or print.

Meeting 1: Manager Shares Results

1. Thank the team for completing the survey and sharing their insights.
2. Distribute the team engagement results.
3. Share your prepared observations.
4. Set expectations for action planning.

Learning & Organization Development at UCSF

Meeting 2: Team Plans Actions

Open the discussion: Looking at the survey results, what stands out most to you?

WHO	STEP 1: FIND THE ISSUE	STEP 2: FIND THE ACTION
Individual	1. **List all the issues** that make it hard for this group to reach its goals (45 seconds) 2. **Check** the ones the team can influence, even if they may not fully be under the team's control. 3. **Circle one** checked issue the team could realistically work on in the next 30-60 days, even if it won't be fully solved.(10 seconds) 4. **Share** your thoughts in your breakout group.	1. **List all the actions** you could take to improve this issue in the next 30-60 days. (2 minutes) 2. **Circle** the top idea from the list. (10 seconds) 3. **Share your idea** in your breakout group.
Small Group	5. **Choose a spokesperson** for your group. 6. **Each person shares** one issue and why they chose it. *(You're selecting an issue, not solving it yet.)* 7. **Vote on one issue** the group wants to prioritize. 8. **Spokesperson presents** the chosen issue and reason to the larger group.	4. **Choose a new spokesperson** for your group. 5. **Each person shares** their action idea and why they chose it. 6. **Vote on one action** the group wants to prioritize. 7. **Spokesperson presents** the chosen action and reason to the larger group.
Team	9. Vote on one issue to focus on.	8. Vote on one action to focus on. 9. Connect the action to the survey.

Next Steps

1. **Enter the Engagement Action Plan** in Gallup Access (see entry instructions).
2. **Hold regular check-ins** to discuss engagement progress.
3. **Restart the process** when actions are complete.

Learning & Organization Development at UCSF