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The Work After the Survey

A Best-Practice Guide to Employee Engagement Survey Action Planning

Measuring engagement is the easy part. The organizations that pull ahead are the ones that act on what they hear. This guide gives HR leaders a practical, repeatable process for turning annual engagement survey results into visible change, stronger trust, and better performance.

What's Inside

Action Planning: The Real Work Happens After the Survey

Most engagement surveys launch with high hopes of employee participation and leadership involvement. When survey results are presented to executive leadership, there is usually a great discussion about improvements and next steps. But this is where many organizations stall. The data gets distributed to all managers, a few leaders review it, and then the calendar swallows the follow-through. Employees notice. Asking people for honest feedback and then doing nothing with it does more damage than never asking at all, because it quietly confirms that speaking up changes nothing.

The business case is clear

Engagement is not a soft metric. It tracks closely with the outcomes executives should care about most:

- **Retention:** Research from the Corporate Leadership Council found highly engaged employees are far less likely to leave, sharply reducing the cost of turnover on your largest expense line: payroll.
- **Performance:** Studies link a highly engaged workforce with meaningfully higher operating income and faster profit growth than less-engaged peers.
- **Cost of inaction:** Analysis from McLean & Company estimates a disengaged employee costs an organization roughly $3,400 for every $10,000 in annual salary in lost productivity.

> The point is not the exact figures. It is the direction. Engagement moves the numbers, and action planning is the mechanism that turns a survey score into a business result.

This guide walks through the full arc: building buy-in, running a clean roll-out, planning at every level of the organization, facilitating the conversations that matter, and sustaining momentum long after the results are published.

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1. *Corporate Leadership Council, Driving Performance and Retention Through Employee Engagement (Corporate Executive Board, 2004).*
2. *https://hr.mcleanco.com/research/ss/implement-an-action-plan-for-employee-engagement-initiatives*

The Foundation: Engagement Is a Shared Responsibility

Before you plan a single action, align on what you specifically want to influence. Engagement is not something an organization instills in its people. It is the product of two forces working together.

The 50/50 proposition

On one side, the organization sets the levers: senior leadership shapes mission, strategy, and culture; HR designs the systems (communication, recognition, development, talent processes); and managers shape the daily experience of their teams. On the other side sits employee choice. Even in a great environment, each person decides how much of themselves to invest.

Action planning works when both sides own their part. The organization removes barriers and creates invitations to engage. Employees engage with the effort. Plans that place the entire burden on either side tend to fail.

Satisfaction versus engagement

It helps to separate two layers. Satisfaction is the foundation: pay, benefits, workload, safety, tools, and flexibility. Meeting these needs drives retention, but it rarely creates energy on its own. Engagement sits above satisfaction and is what drives discretionary effort and performance.

There are five key drivers of employee engagement that create the easy-to-remember acronym **MAGIC.**

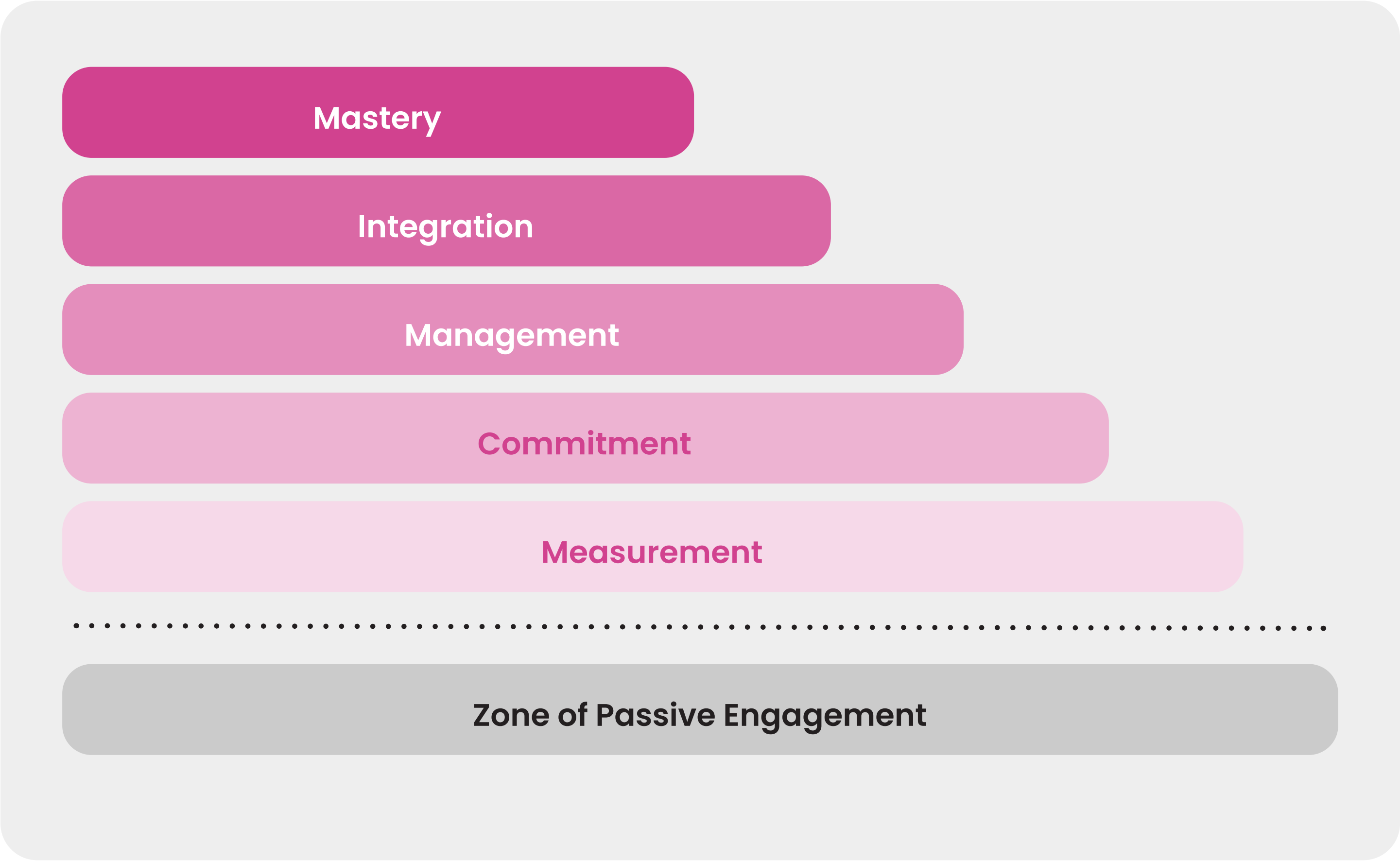
- **Meaning:** The work has purpose beyond a paycheck.
- **Autonomy:** People have the freedom to shape how they work.
- **Growth:** There is room to stretch, learn, and advance.
- **Impact:** People can see the difference their effort makes.
- **Connection:** People feel a sense of belonging with their team and organization.

When you prioritize themes for action, ask which layer you are working on. If satisfaction basics are broken, fix those first. Once the foundation is solid, the biggest gains usually come from the Engagement MAGIC drivers.

Know where your organization stands

Organizations mature in how they handle the employee experience, starting from simply running a survey (Measurement) to weaving engagement into strategy and leadership accountability (Mastery). Strong, disciplined action planning is the hallmark that separates organizations that merely measure from those that actually improve. Honest self-assessment here helps you set realistic goals for this cycle.

The TMA Performance Employee Experience Maturity Model



Securing Leadership Buy-In

Action planning lives or dies depending on leadership commitment. If executives treat the survey as an HR project, managers will too. Fortunately, when confronted with data, leaders are normally motivated to respond. Use these levers to move engagement from an HR initiative to a leadership expectation.

- **Lead with the numbers leaders already track.** Frame engagement in terms of retention costs and payroll, the single largest expense in most organizations.
- **Show the through-line.** Point to research connecting engagement with performance, and, once you have a second cycle of data, show how last year's actions improved this year's scores.
- **Set a clear standard.** Produce a report for every manager with five or more responses. Require action plans for the lowest-scoring teams, for example, the bottom 20 percent.
- **Make it visible.** Ask leaders to present their team's action plans during leadership meetings. Public commitment creates follow-through.

> **A quiet rule of thumb:** people repeat what leaders inspect. When executives ask about action plans in their staff meetings, plans get made. When they don't, plans don't.

The Five-Phase Action Planning Process

At every level of the organization, effective action planning follows the same five phases. Keep the cycle simple and repeatable so it becomes a habit rather than an annual scramble.

1

Review the Results
Read the data before you share it. Identify the genuine strengths and the most important opportunities. Look past the headline score to the item-level detail, trends against last year, and comparisons to benchmarks.

2

Share Results and Prioritize Themes
Bring the results to the people they describe. Discuss openly, invite interpretation, and agree on one or two themes worth pursuing. Prioritization is the discipline here; trying to fix everything often leads to fixing nothing.

3

Create Goals
Translate a theme into a specific, measurable goal that fits the team's context. A goal names the future state you want and gives you a way to know when you have reached it.

4

Take Action
Assign clear owners, set start and finish dates, and begin. Small, visible actions early build the momentum and credibility that carry the bigger changes.

5

Evaluate and Optimize
Revisit progress throughout the year. Celebrate what worked, adjust what didn't, and feed learning into the next cycle. Action planning is a loop, not a line.

Planning at Three Levels: Organization, Department, Team

Engagement shows up differently at each level of the organization, so action planning should happen at each level too. Organization-wide themes need executive ownership. Local team dynamics need the manager closest to them. A good roll-out sequences these so momentum flows from the top down and the bottom up at the same time.

A sample roll-out timeline

Speed matters. The longer results sit before they reach managers and employees, the less relevant they feel. A tight, well-communicated timeline is one of the strongest predictors of follow-through.

Activity	May	June	July
Executive debrief			
Distribute executive reports			
All-manager debrief			
Distribute manager reports			
All-employee debrief / email			
Manager 1:1s with dept heads / HRBPs			
Manager-led team debriefs			
Team action planning meetings			
Action plans due			

Who does what

Organization	Department	Managers
• Debrief the executive team • Identify and prioritize themes • Assign executive sponsors • Empower an engagement committee • Support initiatives throughout the year	• Debrief department leaders • Explore results and themes • Create department-level plans • Empower department committees	• Provide manager reports with recommendations • Train and support action planning meetings • Review and track manager action plans • Add support for lower-scoring teams

Organization action planning in practice

At the organization level, an engagement committee is a useful tool to turn priority themes into concrete plans. A workable structure looks like this:

- Form small action teams of five to eight volunteers, one team per priority theme.
- Introduce engagement and review the relevant results together so everyone works from the same picture.
- Explore the current state, define the future state you want, and draft the specific actions that close the gap.
- Present plans to an executive sponsor for decision and prioritization, then meet monthly to roll out actions and surface new ideas.

Department debriefs

A focused one-hour conversation with each department head (and, where useful, their leaders) keeps momentum between the organization and team levels. A simple agenda:

- **First 10 minutes:** Set context: review the past year, major disruptions, team changes, and dynamics.
- **Next 30 minutes:** Review the data together.
- **Final 20 minutes:** Discuss potential action plans and agree on next steps

The Core Exercise: Current State to Future State

Whether you are planning for the whole organization or a single team, one simple exercise does most of the work. It moves a group from complaint to commitment in three steps: describe where you are, define where you want to be, and decide the actions that bridge the two.

First, choose your posture

Not every piece of feedback calls for the same response. Before acting, decide which of three postures fits:

EXPLORE when you lack information. Dig deeper before you decide.

EXPLAIN when others lack information. Sometimes the issue is understanding, not the underlying reality.

EXECUTE when you have what you need. Move to action.

Then, map current state to future state

List the realities of the current state, then cross out anything outside the team's control. Focusing energy on what you can actually influence is what makes a plan credible. For each remaining item, name the future state and the action that gets you there. Here is an example of actioning on the topic of poor organization communication:

Current State	Action	Future State
Don't know what	Focus groups and team feedback sessions	Will know what
Not timely	Weekly updates	Timely
Infrequent	Weekly updates	Frequent
Unprioritized (noisy)	Label messages by level (1-3)	Prioritized
Don't understand the why	Manager explains the why and invites questions	Will understand the why

Why it works: The exercise turns a vague grievance ("communication is bad") into a short list of specific, ownable actions. That specificity is what separates a plan that moves from a plan that sits.

The Manager's Playbook: Two Meetings

Managers are where engagement is won or lost, because so much of the daily experience is shaped at the team level. Give managers a simple structure and they will use it. The core recommendation: hold two separate meetings, not one.

Meeting 1: The Feedback Meeting

The goal here is understanding, not solutions. Resist the urge to action plan on the spot. Do not action plan yet.

- **Share results (10 minutes):** Provide a copy or summary of the report and name the top strengths and opportunities you see.
- **Discuss (10 minutes):** Facilitate open discussion. Ask questions, talk about what is working, and keep asking "what else?" to surface as many ideas as possible.
- **Summarize (5 minutes):** Close by listing the strengths and opportunities that emerged, and pick one area to pursue.

Meeting 2: The Action Planning Meeting

With a focus chosen, this meeting turns discussion into a plan.

- **Review:** Restate the strengths, the opportunity you are solving for, and why it matters.
- **Discuss goals:** Choose one or two areas. Define specific actions, set accountabilities, and decide who owns what. Set a start date and a first-milestone date.
- **Next steps:** Summarize action items, confirm each owner's commitment, thank the team for their feedback, and schedule the follow-up.

Write goals that are SMART

Every goal should be Specific, Measurable, Attainable, Relevant, and Timely. Consider the team's current context, look for themes beyond the obvious, and resist the temptation to chase everything. One or two focus areas is plenty.

Sample action plan

Goal: Create an environment where every voice is heard, valued, and recognized

Action	Owner	Due
Solicit ideas and suggestions before staff meetings.		
Add staff ideas and suggestions to each staff meeting agenda.		
Launch a monthly "walk and talk" 1:1 between each staff member and supervisor.		
Create a short list of meeting norms the team agrees to.		
Post the norms where the team can see them.		

Common Action Planning Mistakes

Most failures are predictable. Watch for these five, and design your process to avoid them from the start.

1. **Moving too slowly**
Results that take months to reach managers and employees lose their relevance and their urgency.

2. **No manager accountability**
When no one is expected to create a plan or improve results, most won't.

3. **Organization plans that never launch**
Big initiatives stall or lose momentum partway through the year without an owner and a rhythm.

4. **Silence on progress**
If you don't communicate what you are doing, employees assume nothing happened, and you get no credit for real work.

5. **Breaching confidentiality**
Reporting on groups too small does not protect confidentiality and erodes the trust the survey depends on. Hold a minimum response threshold. We recommend 5 or more participants for a manager to receive a report.

Best Practices That Make It Stick

The habits below turn a one-time exercise into an engine for improvement.

- **Keep it simple:** Focus on one thing. A single change carried through beats five that fizzle.
- **Use the data to inform current initiatives:** Connect action plans to work already underway rather than adding a separate pile of tasks.
- **Communicate results and the actions you will take:** Close the loop out loud.
- **Revisit the results during the year:** Progress checks keep the plans alive between survey cycles.

Five ways to move the needle

When you are deciding where to spend your effort, these five moves consistently pay off:

Subtract. Before adding new programs, remove barriers: symbols of distrust, misaligned incentives, and pockets of bureaucracy.

Raise the floor. Help leaders of low-scoring teams by clarifying their role, giving them tools and coaching, and providing ongoing support and accountability.

Support the roof. Study your highest-scoring teams and share what is working with everyone else.

Get credit for the homework. Make sure employees see and feel the changes you make based on their feedback. Recognize their input and share the stories.

Expand ownership. HR should not own engagement alone. Starting with leadership, spread ownership across the organization so every person owns a piece of the experience.

Sustaining Momentum: A Culture of Feedback

The annual engagement survey is your anchor, but it is not the whole story. Organizations that build a genuine culture of feedback listen at every stage of the employee lifecycle, so action planning becomes continuous rather than a once-a-year event.

Layer additional listening around the anchor survey to keep a current read between cycles:

- Candidate and onboarding surveys to shape strong first impressions.
- Pulse surveys and eNPS for fast, frequent signals.
- 360-degree assessments and performance reviews for individual growth.
- Anniversary, stay, and exit surveys to understand why people stay and why they leave.

Each of these produces insight that can feed your action plans. Together they turn engagement from a moment into a habit.

The Takeaway

The organizations that pull ahead on engagement are rarely the ones with the highest survey scores. They are the ones that act, visibly and consistently, on what their people tell them. A survey earns its keep only when it changes something.

Keep the process simple. Build leadership buy-in, move quickly, plan at every level, focus on one or two things that matter, and communicate what you do. Then do it again next year, a little better.

How TMA Performance can help
TMA Performance helps organizations measure and improve the employee experience, from engagement surveys to the frameworks referenced throughout this guide. Our platform, Spectiv, includes a built-in online action planning tool so individuals, managers, and leaders can set goals, track progress, and keep engagement work moving all year, not just at survey time.

Learn more at tmaperformance.com, or reach out to start a conversation about your engagement strategy.

The Action Planning Checklist

Use this checklist to run a clean action planning cycle from results to follow-through. Print it, or copy it into your project tool of choice.

Before roll-out	
	Secure leadership buy-in and set the expectation that action plans are required.
	Agree on the standard (for example, reports for teams with 5+ responses; plans for the lowest-scoring teams).
	Confirm a minimum response threshold to protect confidentiality.
	Build a roll-out timeline and communicate it.
Organization level	
	Debrief the executive team and review organization-wide results.
	Identify and prioritize one to three themes.
	Assign an executive sponsor to each theme.
	Form action teams of 5 to 8 volunteers per theme.
	Draft organization action plans (current state, future state, actions).
	Set a monthly cadence to roll out and review initiatives.
Department level	
	Hold a one-hour debrief with each department head.
	Review context, data, and potential action plans together.
	Create department-level plans and empower department committees.
Team / manager level	
	Provide each manager a report with recommendations.
	Train and support managers on the two-meeting process.
	Hold the Feedback Meeting (share, discuss, summarize; do not action plan yet).
	Hold the Action Planning Meeting (choose one or two focus areas, set SMART goals, assign owners and dates).
	Assign a Team Leader and a Secretary.
	Submit finalized action plans to the department head or HR.
Follow-through	
	Communicate results and the actions you will take.
	Review action plans in regular team meetings throughout the year.
	Recognize employee input and share wins (get credit for the homework).
	Evaluate progress and feed learning into next year's cycle.