

# 26. How to Create an Action Plan for Employees

## 1 OVERVIEW

---

It is good practice to have a development action plan in place for employees. This helps employees to identify personal and career goals that will increase their skills and knowledge in their current job and also in their ongoing future career.

Working with your employee to identify the areas where they would like to develop and providing the opportunities for them to learn and develop should be positive and motivating for the employee.

It is also a supportive measure to ensure that employees are receiving the necessary help and assistance to carry out their job and an opportunity to understand if any further support is required.

## 2 PREPARING FOR THE ACTION PLANNING MEETING

---

- Define the most important outcomes needed for the employee in terms of your overall company plan.
- Consider some job-related and personal developmental goal ideas for the individual.
- Ask your employee to also consider some job-related and personal development goal ideas.
- Gather the information you need for the meeting, such as, the employee's job description and appraisal documentation.

## 3 DURING THE ACTION PLANNING MEETING

---

- Arrange to hold the meeting in a room where you are unlikely to be interrupted so that you can focus and enable your employee to be open and honest.
- Let your employee explain the areas they have identified for development.
- Give feedback on the selected areas of personal and professional development.
- Agree on a development action plan with the employee. The action plan should include development goals which will help the employee personally and professionally.
- Agree how the goals will be measured and how the employee will know if they are achieving them.
- Agree how often the action plan will be reviewed, for example, quarterly.
- End the meeting in a positive and supportive manner and let the employee know that you are available for support and assistance.

## 4 FOLLOWING THE ACTION PLANNING MEETING

---

- Ensure that any support that was discussed and agreed is followed-up and arranged.
- Follow up with any with performance feedback and discussions regularly throughout the quarter.
- Ensure that any tools, resources or other commitments that were agreed in order to help the employee achieve their goals are followed-up, for example, payment for courses, job shadowing or agreed upon projects or assignments.
- Ensure that the goals are recorded on a form, which is signed by both you and the employee and securely and confidentially stored.

## 5 NEXT STEPS

- Promote a culture of continuous learning and improvement by asking employees to consider personal and professional goals and objectives in preparation for their action planning meeting.
- Consider your overall company plan and how employees can individually contribute to this.
- Explain to employees the reasons to create action plans. It should be motivating for your employees that you are facilitating their personal and professional growth.

## 6 FACTSHEETS & TEMPLATES TO HELP

- How to Conduct a Performance Appraisal
- How to Identify Training Needs
- Employee Action Plan
- Pre Appraisal Form
- Appraisal Form

## 7 FOR MORE ADVICE AND INFORMATION

**ACAS** - (Advisory, Conciliation and Arbitration Service) free and impartial information and advice to employers and employees on all aspects of workplace relations and employment law. [www.acas.org.uk](http://www.acas.org.uk)

**Achieve in Bath & North East Somerset** - free recruitment support, advice and help. Matching job seekers, employers and course providers to help employers recruit, train and retain employees. [www.achieveinbathnes.co.uk](http://www.achieveinbathnes.co.uk)

**Future Bright** - free help & support for businesses and employees to realise their full potential. Provide access to training and development, workshops and networking. HR support to promote career progression and best practice to attract and retain staff. [www.futurebright.org.uk](http://www.futurebright.org.uk)

**Bibliography** - this fact sheet was produced by Rathbone HR Solutions in association with Cool Ventures Ltd in December 2018 with content sourced from; HR Inform ([www.hr-inform.co.uk](http://www.hr-inform.co.uk)), ACAS ([www.acas.org.uk](http://www.acas.org.uk)), CIPD ([www.cipd.co.uk](http://www.cipd.co.uk)), the pensions regulator ([www.thepensionsregulator.gov.uk/en/employers](http://www.thepensionsregulator.gov.uk/en/employers)), HMRC ([www.gov.uk/government/organisations/hm-revenue-customs](http://www.gov.uk/government/organisations/hm-revenue-customs)), the Information Commissioner's Officer website ([www.ico.org.uk](http://www.ico.org.uk))



Created for Future Bright by Cool Ventures - Business Support in Bath, Bristol, Wiltshire, Gloucestershire, South Gloucestershire and throughout South West England [www.coolventures.co.uk](http://www.coolventures.co.uk)