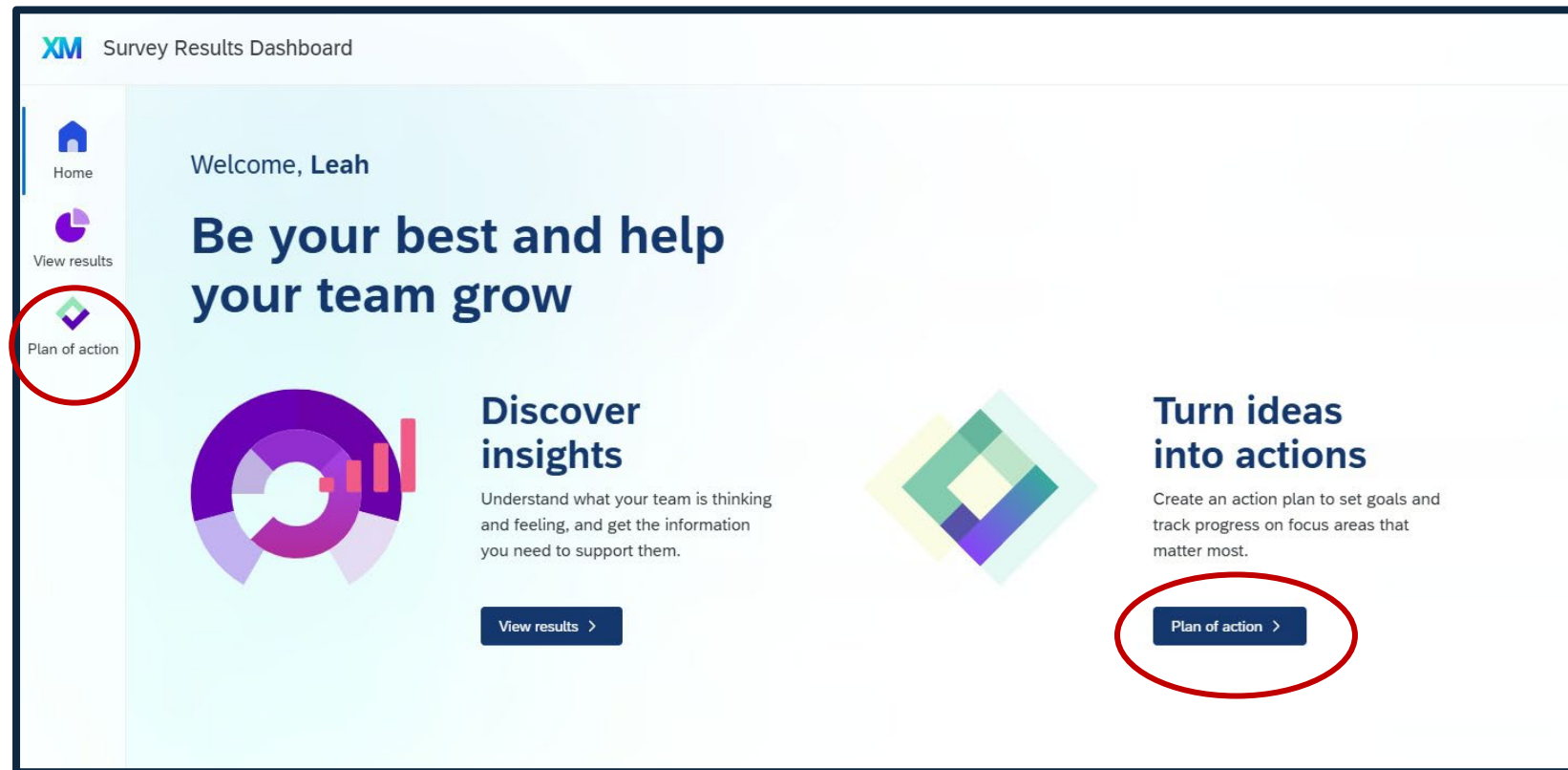


# Creating an Action Plan from the Qualtrics Action Planning module

From the Survey Results Dashboard homepage, click **Plan of action** (on the page or the toolbar on the left).



# Creating a New Action Plan

1. Click **Create an action plan**.
2. Select **Employee Experience Survey 2025** from the **Choose a dashboard** drop-down menu.
3. Select the option that best describes your goal for action planning:
  - a) **Option 1**, creating an action from a survey, allows you to select a survey **question** from a drop-down menu.
  - b) **Option 2**, creating an action from a **topic**, allows you to select a survey **category** from a drop-down menu.
  - c) **Option 3**, creating an action to **address something else**, allows you to create an action item to address a custom area of focus.
4. Next, click **Create an action plan**.
5. Then click **New action** to document the actions you'll take to complete this action item.



**1** Plan of action  
Take action on focus areas and track progress, step-by-step  
Create an action plan Here's how to get started  
View Your action plans

Create an action plan in a few simple steps

Step 1: Select the dashboard this action plan is associated with  
Choose a dashboard ^

Search...  
Admin Playground  
Employee Experience Survey 2025

I'd like to create an action plan to address feedback from a survey

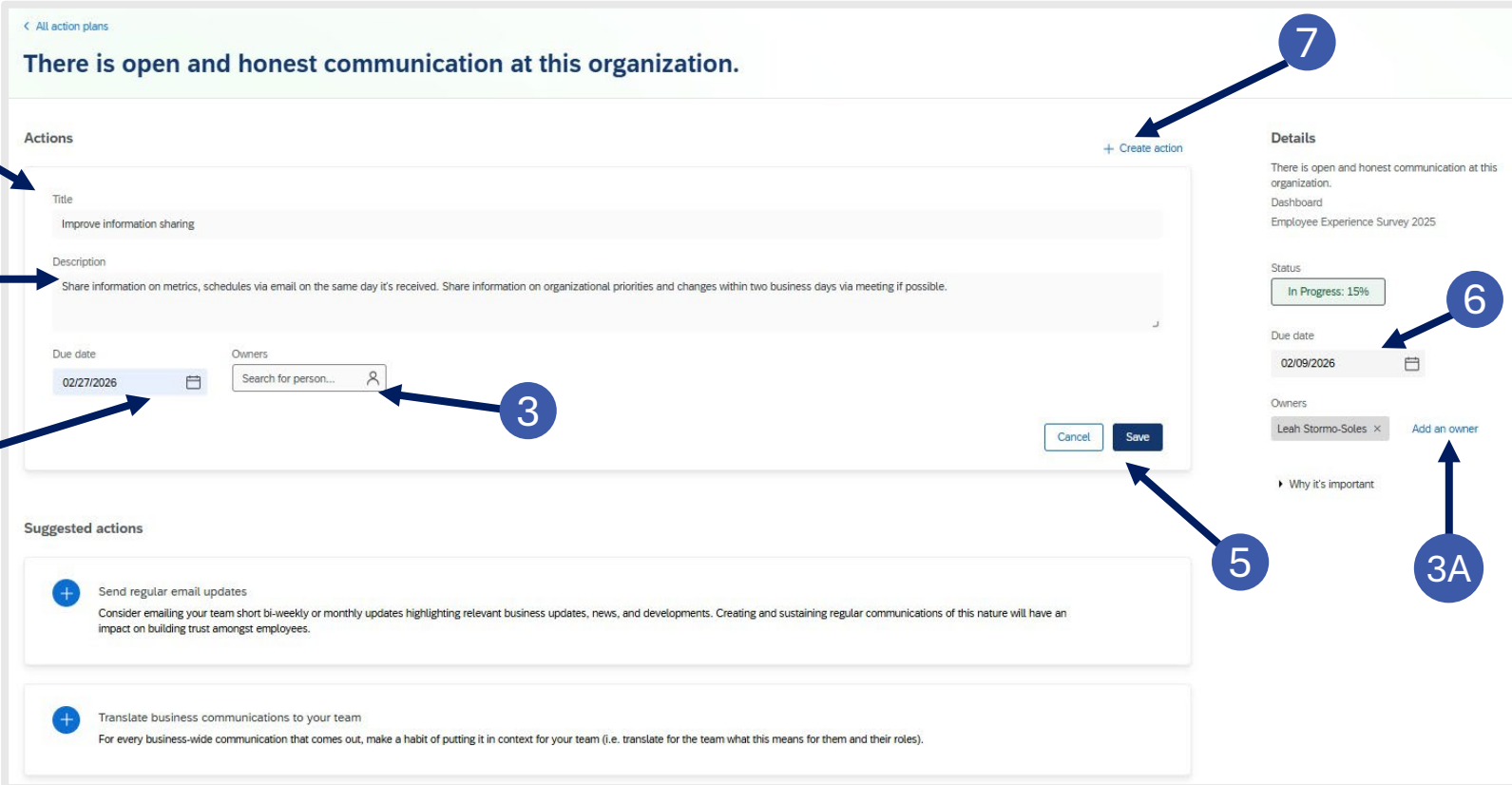
Select one ^  
respectfully  
My job makes good use of my skills and abilities  
I believe that positive change will happen as a result of this survey  
I have the training I need to do my job effectively  
Senior leadership shows genuine interest in the well-being of employees  
I have confidence in the decisions made by my manager  
My manager is an effective leader  
I trust my manager

Create an action plan

Add action items to this action plan.  
New action

# Documenting Your Actions

1. Enter the title for your action in the **Title** box.
2. In the **Description** box, detail your action following the SMART model. Make sure the action is Specific, Measurable, Action-Oriented, Relevant, and Timely.
3. If you are partnering with someone on this action, add them as a co-owner.
  - 3A. If you want to add them as a co-owner to the overall action plan, add them on the right.
4. Set the due date for the action.
5. Click **Save** to save the action.
6. Set a **due date** for improving the priority area
7. To create a new action, click on **Create Action**
  - Repeat steps 1-6



The screenshot shows the 'All action plans' interface. At the top, there's a header with a back arrow and the text '< All action plans'. Below this is a green banner with the title 'There is open and honest communication at this organization.' and a '+ Create action' button. The main form has three sections: 'Title' (with the text 'Improve information sharing'), 'Description' (with a detailed paragraph about sharing information), and 'Due date' (set to '02/27/2026'). There's also an 'Owners' section with a search bar. Below the main form is a 'Suggested actions' section with two items: 'Send regular email updates' and 'Translate business communications to your team'. On the right side, there's a 'Details' panel showing the title, status ('In Progress: 15%'), due date ('02/09/2026'), and owners ('Leah Stormo-Soles'). There's an 'Add an owner' button and a 'Why it's important' section. Numbered callouts point to various elements: 1 points to the Title box, 2 points to the Description box, 3 points to the Owners search bar, 3A points to the 'Add an owner' button, 4 points to the Due date field, 5 points to the Save button, 6 points to the Due date field in the Details panel, and 7 points to the '+ Create action' button.