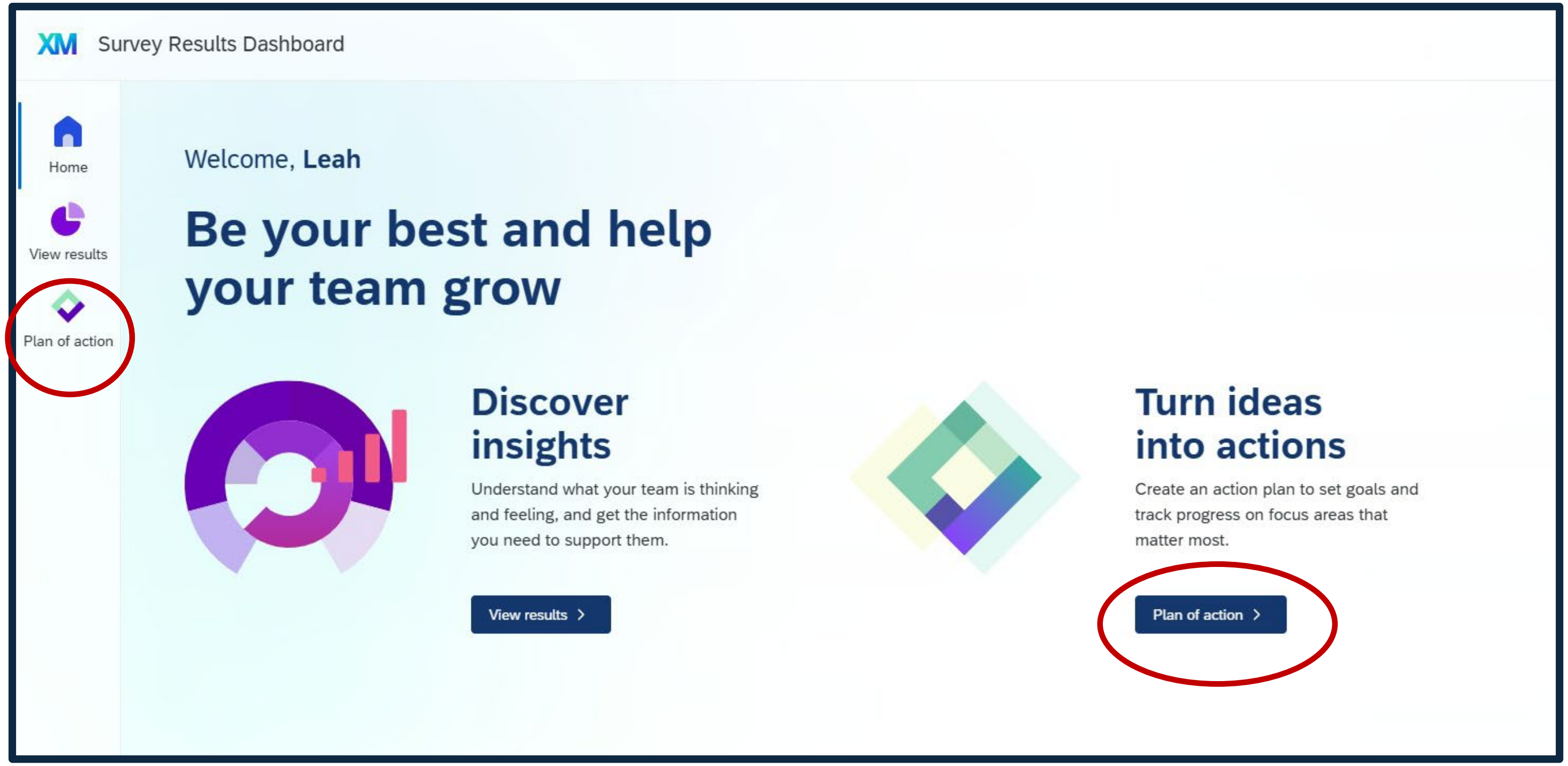
Creating an Action Plan from the Qualtrics Action Planning module

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.

Documenting Your Actions

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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