



Secrets to Successful Action Planning

In our transfer of learning process; turning learning into action, we have three discreet stages, preparation, action and evaluation.

Action planning is at the very heart of the preparation stage. So today, that's what we're going to be focusing on. We'll be talking about what you can do to make sure the Action Planning you do with your participants effectively supports their learning transfer. The Action Plan is the stage where you have your participants collect their commitments for what they're going to put in place. It's where they reflect on what they learn, and create a plan for what they're going to take away.

Now, intellectually, I'm sure most Learning and Development professionals or trainers could tell you what comprises of a really good Action Planning session. Why is it then, when I got to training programs, that I see Action Planning being done very badly? Let's take a moment to think about the 3 key challenges when Action Planning in the Learning environment.

The 3 key challenges are lack of time, lack of focus and lack of energy. Thankfully, these challenges can be overcome. Let's look at them each though so we can be really clear as to what we mean and what the challenge looks like.

In terms of lack of time, often in training programs there's too much content. Or you fall into the trap of thinking, if I just add this one little piece of content; I'm going to be adding additional value. The challenge is, by the time you get to the end of the program, it's not the content that's adding additional value, it's the action planning that will make a difference to the transfer.

Looking at lack of time; people often run out of time towards the end of a training program. Maybe because they've got too much content, or maybe because activities overrun, and we get caught in the trap of being short of time, so the thing that gets axed is the Action Plan. But the Action Plan is the thing that is going to make a difference back in the real world for Transfer of Learning. So timing can be a real issue.

The second challenge is lack of focus. The focus is often more on the content, than the Action Planning. The trainer or the facilitator is very across the content, they love the content, and they know the content is great. That focus remains with the content, and Action Planning, because it's something that they don't have control of when the person goes back to the workplace, never becomes a real focus at any point in time.

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But of course, no matter how great the learning program is, if the learning doesn't transfer, then you don't get the value. So in my mind, there needs to be even more focus on the Action Planning than the content.

The third and final challenge is lack of energy. This is an interesting one. Often when I see Action Planning processes put into place, because it's a solitary process that the participant does on their own, or perhaps in pairs, when the process is set up, I often see the facilitator or the trainer actually leave the room. Or they get busy preparing the final part of the program, or getting evaluation forms ready, and they don't remain present with the participants while they're actually Action Planning.

Even though it's a solitary process, when we're working with people on Action Planning, we're actually walking around the room, we're checking that people are able to come up with their Action Plans, and we remain really present with the process. I think the energy needs to be on this so that the participants can realise the importance of it.

So if those are the challenges, what can we effectively do about it?

The first thing is to make sure you prioritise the Action Planning. Give it ample time, and stick to that. I think at least 30 minutes to 1 hour is required at the end of a training session. Obviously this depends on whether it's been a four-day program or a one day program. The absolute minimum I think is 30 minutes – to have a good Action Plan in process, preferably an hour. When you set that time on the agenda, stick to it.

Secondly, you can ensure that there's a distribution plan for the Action Plans. It's amazing how much more attention someone gives to their Action Plan when they know they're going to be distributed to the Managers of the participants. So make sure you have a process so that they can be collated and distributed.

The third thing we can do is change the energy around the Action Planning process. Be present, as I was mentioning before. Also, try to change the energy in the room, by maybe putting the chairs in a semi circle rather than having the chairs behind the desk. You could change the type of music that you're using to accompany the Action Planning. Anything to make it a little bit different from the content pieces. Also, in terms of the energy, really make it clear that this is the start of the next stage of the process. Rather than having it at the very end of the training process. Often at the end of a training program people are tired, they're checking their watches, they're thinking about getting their flight home. You need to override this, by making it the start of a new process, and setting their sights on what they're going to do on return from the program.

The fourth thing you can do is use a capture sheet. A capture sheet is a one-page document that you specifically give to the participants at the beginning of

the program, perhaps printed on yellow paper, or something similar that will stand out. They use this sheet any time something happens that might be an 'Ah ha!' moment for them, or something they think is going to be really relevant, or something that is going to be really useful. These sheets capture their ideas for implementation as they go throughout. Using a capture sheet really helps the Action Planning process because when it comes to creating the Action Plan, they go back to their capture sheet and pull the information from there, of what they're actually going to use.

The fifth thing you can do to make your Action Plans really successful for your participants is to make them useful, not onerous. Make sure that what you're collecting in the Action Plan is going to be really helpful in terms of behavioural change.

You can download a copy of one of our Action Plans from our website; www.leverlearning.com in the Resources section.

Here is an overview of how we make our Action Plans useful, and not onerous. We use a 3 x 5 matrix, suggesting that people put in place 3 specific things that they want to take away, use and implement back in the workplace. Across the top we have the 5 different columns asking 'what specifically is it that you're going to implement?', 'why is that important to you?', 'what is success going to look like?', they have to calibrate on a scale of 1 – 10 where they are at that moment (generally the calibration is quite low, especially if it's something that's new to them), and finally answer what they are going to do in the next 48 hours after they've left the learning event to gain the momentum around this implementation of action.

I think most of those things people will have come up with anyway. The 'why' is particularly important because it gets people to focus on why it is important to them, so they are really drilling down to their own motivations. I think calibration is important because we use that throughout the reflection process, having people say where they are now (on a scale of 1-10), and where they want to get to (on a scale of 1-10), and describing the difference.

That's our way of capturing the specifics behind the action.

To summarise, the five things you can do to make sure your Action Planning is really successful, firstly; prioritise the Action Planning. Secondly, make sure that they're going to be distributed. Thirdly, change your energy and focus around the Action Planning. Fourthly, use a capture sheet. Finally, make sure that they're useful, rather than onerous.

Hope this has been useful to learn about Action Planning, what the main challenges are, and what you can do to overcome those, and some of the content of the Action Plan itself. Please stop by the website,

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www.leverlearning.com so we can know how you're doing with your Action Planning and Good Luck with it.

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