ActionPlanner
Successful Humans @ Work®

CLIENT SUCCESS STORY
INDUSTRY: Financial sector
TEAM SIZE: 160 employees
LOCATION: Nordic region

STRATEGY
IMPLEMENTATION

Challenge

Despite having a well-defined structure for strategy implementation, companies often struggle with the actual execution of their goals. Many keep their action plans in simple formats such as spreadsheets and presentation slides and experience issues with updating information and monitoring progress. The result is typically lack of transparency from strategy to daily execution, no alignment between overall goals and the actual work, wasted time in finding and sharing information, and little empowerment of employees.
Our client faced a similar challenge.

Ambition and requirements

Our client's ambition is to stay on top of technological opportunities and strive for excellence. To succeed in strategy implementation, they decided to digitalise the management follow-up process and make it more agile. The most urgent requirement was transparency with automatic sharing of strategic goals and actions across all organisational levels. They also wanted the ability to communicate and cascade initiatives, monitor and add new goals, update statuses and get progress reports. And as a nice-to-have, a user-friendly interface that both managers and employees could use 24/7.

The most urgent requirement was transparency with automatic sharing of strategic goals and actions across all organisational levels.

Solution

ActionPlanner was suggested as a solution and the decision was quickly made to go ahead with a trial including senior management and a number of super users, totalling 30 users. Within three months, the tool had proved highly valuable in four particular business cases and they decided to roll out ActionPlanner to all 160 employees. **These business cases are presented below:**

CASE: **STRATEGY EXECUTION**
Value: **No surprises!**

ActionPlanner translates good intentions into something more concrete – making plans come alive. It provides a uniform data structure to achieve great results, integrating daily operations with overall company goals and ensuring long-term engagement with employees.

"Thanks to ActionPlanner, we are more transparent and open. I can keep the board of directors informed if there are challenges in our processes and there are no hidden agendas or surprises, which is why we have also received a very good evaluation in employee satisfaction surveys."

— CEO

CASE: **BUSINESS EXECUTION**
Value: **Fewer and more valuable status meetings**

ActionPlanner creates transparency and alignment, gives real-time overview of actions and reports, flags potential challenges, provides employees with the support they need in their daily work, and insures commitment to actions they can realistically implement.

"In the past, a lot of meetings have been necessary due to lack of transparency. ActionPlanner is our new forum used for reporting and feedback and we can focus on getting the job done, saving time to actually execute instead of having lots of meetings."

— Process owner

CASE: **PORTFOLIO OVERVIEW**
Value: **Clear visibility and accountability**

ActionPlanner converts strategic goals into visual roadmaps with tangible initiatives. It provides an overview of the progress and what requires attention, with insights in real-time. This facilitates keeping momentum in both developing and running a business.

"With the help of ActionPlanner, it's easy to follow the whole development portfolio. We can see real-time status updates and information about the responsibilities and initiatives. If an initiative hasn't been added to ActionPlanner, it doesn't exist."

— Executive advisor

CASE: **PERFORMANCE MANAGEMENT**
Value: **More specific and realistic goals**

ActionPlanner turns responsibilities into initiatives and breaks them down into goals, milestones and deadlines. This gives an overview of performance in a matter of seconds, using simple colour guides, and helps employees be more specific in their communication across organisational levels.

"The biggest challenge in our team has been lack of resources. Now we can see what is coming and what has been done, how many people are working on different issues and so on. We can better divide the resources, to address the most important matters."

— Legal team lead

Impact of ActionPlanner

Since introducing ActionPlanner, our client has made significant progress; drastically increased its employee satisfaction, become one of the great places to work and received third party praise for introducing a high degree of transparency, **as shown in the three prominent studies below:**

Employee Satisfaction Index

Significant increase in how employees feel that they have been provided with information about forthcoming long-term development programmes. On a 0-100 scale, the score increased with 18% from 69 to 84 from the previous year.

Great Place to Work

Ranked as one of the best medium-sized companies to work for in a study covering over 50 countries. Employee assessment on management's ability to inform employees on important issues and changes increased from 72% to 80% from the previous year.

European Foundation for Quality Management

Received four stars in this study based on the EFQM Excellence Model. Praise was given for transparency in communicating the company strategy, with mention of using ActionPlanner for performance reporting and process development.

Our client has made significant progress; drastically increased its employee satisfaction, become one of the great places to work and received third party praise for introducing a high degree of transparency.

SUCCESS DRIVERS

For successful implementation of ActionPlanner, the following key drivers have been identified:

1. **Well-defined structure.** A detailed process framework existed from the outset with clear process owners and sub-processes, which facilitated an effective deployment of ActionPlanner.

2. **Efficient onboarding.** Managers and employees were introduced to a clear purpose sheet with expectations of why, what and how to work with ActionPlanner on a day-to-day basis.

3. **Dedicated implementation.** A selected number of committed users were trained to become ActionPlanner Certified Trainers. They took ownership of driving the deployment to all employees and showing the way, with the support from the senior management team.

4. **Transparency and alignment.** Openness and honesty, clear communication and established reporting routines across all organisational levels increased employee satisfaction. Having an ambitious CEO that uses the tool daily has also been paramount for the success.