ActionPlanner
Successful Humans @ Work®

ActionPlanner
onboarding process
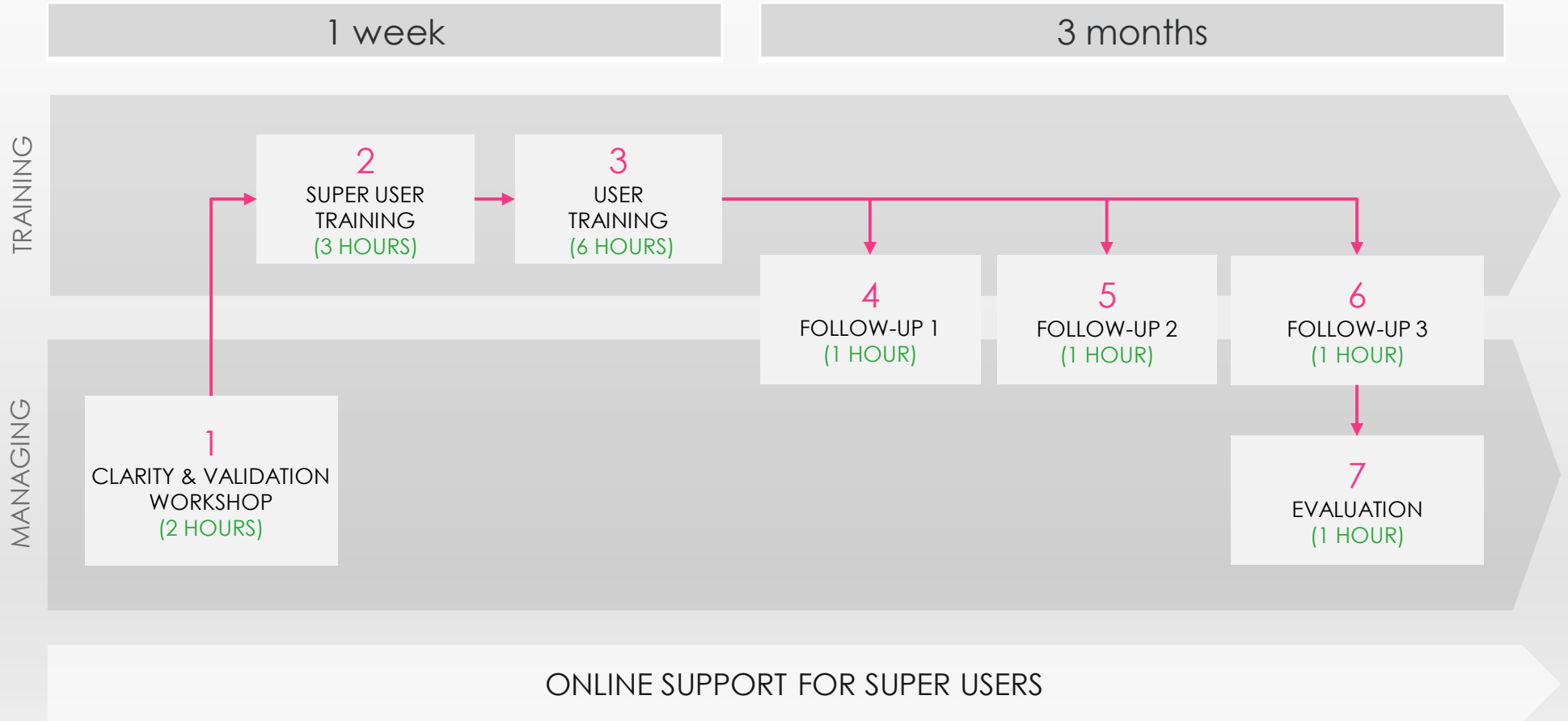
Details of the onboarding process

Element	Activity	Purpose
Clarity Workshop	Clarity workshop with sponsor • Define the WHY (purpose), WHAT (objectives/success criteria) and HOW (who, when) to use ActionPlanner • Decide on the overall roadmap structure • Identify high level initiatives	• Decide scope and framework in which to on-board within • Prepare communication to employees • Lock configuration specifications
Validation Workshop	• Assessment of existing plans: Clarity, Quality, Quantity • If needed initiative & action planning in Excel template prior to workshop	• Ensure a robust roadmap breakdown into clear objectives and initiatives/tasks • Validate action plan quality prior to loading into ActionPlanner
Super User Training	• Introduction to why, what and how to use ActionPlanner • Walk through the plans (strategic & operational) • Basic ActionPlanner training in front-end & back-end • Plan the on-boarding process: roles & responsibilities and next steps	• Prepare Super Users for the on-boarding process
User Training	• Introduction to why, what and how to use ActionPlanner • Walk through the plans (strategic & operational) • Basic ActionPlanner training in front-end • Agree on how to get started and first follow-up session	• Describe the mindset to Users and give them competences to use ActionPlanner & execute efficiently
Follow-up session	1 hour follow-up sessions • Is ActionPlanner used as intended?: Clarity, Quality & Quantity • What corrections/changes, if any, need to be made?	• Ensure a successful on-boarding for all and maximize value output
Evaluation	Evaluation with sponsor – follow-up on success criteria • What worked and why? • What did not work and why? • Take away experiences to be used going forward	• Apply learning points from the first on-boarding process to the following unit on-boarding