Q12 Impact Plans

The Q12 Impact Plans product displays all Impact Plans for the current business unit and selected report period. It allows you to find, review, create, and update Impact Plans to address the core Q12 items that you want to improve.

You can select a different reporting period from the Report Period drop-down field in the Report Options area. You can also select a different business unit via the Business Unit Navigation tool.

Accessing Q12 Impact Plans

Depending on your current location on Gallup Online, you can access the Q12 Impact Plans product in two ways:

- From the My Gallup page, click Q12 Impact Plans in the Our Workplace Deliverables area.
- From an employee engagement product page, select Q12 Impact Plans from the Jump To drop-down field.
Sort Order
To change the sort order of the information on the Q12 Impact Plans page, click the sort symbol above the column heading on which you want to sort. The following sort symbols indicate how the information is sorted, as well as a column’s current sort status:

▲ The information is currently sorted in ascending order based on the data in this column. Click this column heading to reverse the sorting so that it is in descending order.

▼ The information is not currently sorted based on the data in this column. Click this column heading to sort the information based on the data in this column.

For example, if you want to sort the information based on the name of the individual who created the plan, then click the ▲ symbol above the Created By column heading.
How to Create a New Impact Plan

1. From the **My Gallup** page, click **Q12 Impact Plans** in the **Deliverables** section of the **Our Workplace** area.

2. On the upper-right side of the **Q12 Impact Plans** page, use the Business Unit Navigation tool to select the business unit for which you are creating a new Impact Plan.
3. On the left side of the page, use the **Report Period** drop-down list to select the desired report period for which you want to create the plan.

4. Click the **Add New** button to display the **Q12 Impact Plans: Item Detail** page.

5. On the **Q12 Impact Plans: Item Detail** page, enter detailed information about the plan in the **Impact Plan** section.

NOTE: Use the SMART hints at the top of the page for helpful ideas on creating a successful Impact Plan.
Impact Plan section

**NOTE:** Your session will automatically end (i.e., time out) after approximately 10 minutes, at which point any unsaved work will be lost. Therefore it is important to save your work often by clicking **Save** at the bottom of the page.

a. From the **Q12 Item** drop-down list, select a Q12 item for the plan to focus on.

b. From the **Mean or %5** drop-down list, select one of the following metrics to use as a baseline measurement for the plan:

   - **Mean** The average response, on a 5-point scale, for the Q12 item.
   - **%5** The percentage of “5” (Strongly Agree/Extremely Satisfied) responses for the Q12 item.

c. In the **Value from the Q12 Scorecard** field, type the appropriate value of the Q12 item from the most recent survey.

**NOTE:** If the **Mean or %5** field is set to **Mean**, then enter a value between 1.00 and 5.00. Alternatively, if the **Mean or %5** field is set to **%5**, then enter a value between 0 and 100.
d. In the **Title** field, type a concise description to identify your plan.

e. From the **Action Type** drop-down list, select one of the following plan types:

   - **Strength**: Your plan focuses on an item that is already scoring well. The intention of the plan is to help the item maintain a high score.

   - **Opportunity**: Your plan focuses on an item that you want to achieve a higher score. The intention of the plan is to improve the score of the item.

e. In the **This is what we'll do** field, type specific actions and deadlines (if necessary). These are the specific actions and activities that take place to execute the plan.

f. In the **This is what success will look like** field, type the benefits of a successfully executed plan in the field. These are the tangible or obvious outcomes of the plan.

h. From the **How Often** drop-down list, select the frequency of when the actions will be performed. This field outlines how often the individuals identified in the **These people will be involved** field will execute the actions listed in the **This is what we’ll do** field.

i. In the **These people will be involved** field, type the names of the individuals who are responsible for executing the plan and ensuring its success.

j. Use the date drop-down lists of the **Start Date** field to select a start date.

   ![Start Date and Due Date fields](image)

k. Use the date drop-down lists of the **Due Date** field to select a due date.

6. When you are done entering information about the plan, click **Save & Exit** at the bottom of the page to save your plan and return to the **Q12 Impact Plans** page.

![Save & Exit button](image)
How to Update the Progress of an Impact Plan

1. From the My Gallup page, click Q12 Impact Plans in the Deliverables section of the Our Workplace area.

2. On the Q12 Impact Plans page, select the desired business unit (via the Business Unit Navigation tool) and report period (via the Report Period drop-down list) to which the plan belongs.

3. From the list of plans, click the title of the plan you want to update.
4. On the Q¹² Impact Plans: Item Detail page, add your information regarding the progress of the plan to the Follow-Up section.

NOTE: Your session will automatically end (i.e., time out) after approximately 10 minutes, at which point any unsaved work will be lost. Therefore it is important to save your work often by clicking Save at the bottom of the page.

a. From the % Complete drop-down list, select an amount for the percentage of progress on the plan.

b. From the Rating drop-down list, select an appropriate rating to grade the plan.

c. In the This is the progress we have made field, type a summary of milestones and other objectives that have been accomplished.

d. In the We have made these additional commitments field, type a description of additional aspects or unforeseen effects of the plan.

e. In the Notes field, type any miscellaneous information about the plan.

5. When you are done updating the progress of the plan, click Save & Exit at the bottom of the page to save your information and return to the Q¹² Impact Plans page.
Q^{12} Impact Plans: Item Detail

The Q^{12} Impact Plans: Item Detail page contains the specific details of an Impact Plan and its progress.

You can modify the information on the Q^{12} Impact Plans: Item Detail page when viewing a plan assigned to your home business unit, or when creating a new plan.

NOTE: When modifying or entering information on this page, you have approximately 10 minutes to do so before your session will automatically end (i.e., time out). Therefore it is important to save your work often by clicking the Save button at the bottom of the page.

The Q^{12} Impact Plans: Item Detail page consists of the Smart Thinking section, Impact Plan section, and the Follow-Up section.
Smart Thinking
The Smart Thinking section contains hints to help you set SMART (Specific, Measurable, Action-oriented/Attainable, Realistic, and Timely) goals for a successful Impact Plan. This section appears at the top of the page when you create a new plan or edit an existing plan.

![Smart Thinking section]

Click the question mark symbol (?) to display a list of hints for the corresponding SMART goal. Click the minus symbol — to hide the list of hints.

Impact Plan
The Impact Plan section contains the specific details of an Impact Plan.

![Impact Plan section]
The following fields are available in the **Impact Plan** section:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Business Unit</strong></td>
<td>The business unit to which the plan belongs.</td>
</tr>
<tr>
<td></td>
<td>NOTE: You cannot edit this field when creating a new plan. This is because</td>
</tr>
<tr>
<td></td>
<td>you can only create new plans for the current business unit.</td>
</tr>
<tr>
<td><strong>Report Period</strong></td>
<td>The report period to which the plan belongs.</td>
</tr>
<tr>
<td></td>
<td>NOTE: You cannot edit this field when creating a new plan. This is because</td>
</tr>
<tr>
<td></td>
<td>you can only create new plans for the currently selected report period.</td>
</tr>
<tr>
<td><strong>Q12 Item</strong></td>
<td>The Q12 item that the plan focuses on. Select the desired item from the</td>
</tr>
<tr>
<td></td>
<td>drop-down list. After you have selected an item, a <strong>Need Ideas?</strong> link</td>
</tr>
<tr>
<td></td>
<td>appears to the right of this field. Click this link to view a PDF comprised</td>
</tr>
<tr>
<td></td>
<td>of helpful information regarding the selected item.</td>
</tr>
<tr>
<td><strong>Mean or %5</strong></td>
<td>The type of metric that determines the effectiveness of the plan. Select</td>
</tr>
<tr>
<td></td>
<td>one of the following metrics from the drop-down list:</td>
</tr>
<tr>
<td><strong>Mean</strong></td>
<td>The average response, on a 5-point scale, for the Q12 item.</td>
</tr>
<tr>
<td><strong>%5</strong></td>
<td>The percentage of “5” (Strongly Agree/Extremely Satisfied) responses for</td>
</tr>
<tr>
<td></td>
<td>the Q12 item.</td>
</tr>
<tr>
<td>**Value from the Q12</td>
<td>The mean or %5 value for the Q12 item from the most recent Q12 Scorecard</td>
</tr>
<tr>
<td>Scorecard**</td>
<td>survey. Type the appropriate value in the field.</td>
</tr>
<tr>
<td></td>
<td>NOTE: Enter a value in this field based on the <strong>Mean or %5</strong> field. For</td>
</tr>
<tr>
<td></td>
<td>example, if the <strong>Mean or %5</strong> field is set to <strong>Mean</strong>, then enter a value</td>
</tr>
<tr>
<td></td>
<td>between 1.00 and 5.00. Alternatively, if the <strong>Mean or %5</strong> field is set to</td>
</tr>
<tr>
<td></td>
<td><strong>%5</strong>, then enter a value between 0 and 100.</td>
</tr>
<tr>
<td><strong>Title</strong></td>
<td>The title of the plan. Type a concise description in the field to identify</td>
</tr>
<tr>
<td></td>
<td>your plan.</td>
</tr>
<tr>
<td><strong>Action Type</strong></td>
<td>The type of plan. Select one of the following items from the drop-down list:</td>
</tr>
<tr>
<td><strong>Strength</strong></td>
<td>A plan that focuses on an item that is already scoring well. The intention</td>
</tr>
<tr>
<td></td>
<td>of the plan is to help the item maintain a high score.</td>
</tr>
</tbody>
</table>
Opportunity  A plan that focuses on an item that you want to achieve a higher score. The intention of the plan is to improve the score of the item.

This is what we’ll do * What you will do to complete the plan. These are the specific actions and activities that take place to execute the plan. Type specific actions and deadlines (if necessary) in the field.

This is what success will look like * The benefits of a successfully executed plan. Whereas the $Q^{12}$ item is the overall goal of the plan, this is the tangible or obvious outcome of the plan. Type the benefits of a successfully executed plan in the field.

How often The frequency for when the actions of the plan will be performed. This field outlines how often the individuals identified in the These people will be involved field will execute the actions listed in the This is what we’ll do field. Select the desired time period from the drop-down list.

These people will be involved The individuals who are responsible for executing the plan and ensuring its success. Type the names of the individuals in the field.

Start Date The date the plan was implemented. Use the set of drop-down lists to select a start date.

Due Date The date you will complete the plan. Use the set of drop-down lists to select a due date.

* When creating a new plan, use the SMART hints at the top of the page for helpful ideas on what to include in these fields.
Follow-Up
The Follow-Up section contains information regarding the progress of an Impact Plan.

The following fields are available in the Follow-Up section:

- **% Complete**: The percentage of the plan that is complete. Use the drop-down list to select the percentage amount (in increments of 10).
- **Rating**: The grade or evaluation of the plan on a 5-point scale. Use the drop-down list to select an appropriate rating.
- **This is the progress we have made**: Milestones and other objectives that have been accomplished. Type a summary of the accomplishments in the field.
- **We have made these additional commitments**: Additional aspects or unforeseen effects of the plan. Type a description of these items in the field.
- **Notes**: Miscellaneous information pertaining to the plan that is unsuitable for another field. Type your notes in the field.

The following buttons are located at the bottom of the Q12 Impact Plans: Item Detail page, and are only available when creating a new Impact Plan or when modifying an existing one:

- **Delete**: Click this button to delete an existing plan and return to the Q12 Impact Plans page.
  
  NOTE: The Delete button is not available when creating a new plan.

- **Save**: Click this button to save the current state of your plan.

- **Save & Exit**: Click this button to save your plan and return to the Q12 Impact Plans page.
Cancel  Click this button to return to the Q¹² Impact Plans page without saving your plan.

When viewing an existing Impact Plan, additional information also appears above the Impact Plan section on the Q¹² Impact Plans: Item Detail page.

This information includes the date the plan was created and the date it was last modified. Furthermore, a plan that has been designated as a Best Practice is indicated as such, whereas one that has not been designated as a Best Practice displays the following fields instead:

- **Best Practice** Select this check box to designate a plan as a Best Practice.
- **Submit** After selecting the Best Practice check box, click Submit to finalize your designation.
Searching for Impact Plans

The following search tools are available on the Q12 Impact Plans page:
- Q12 Impact Plans Search
- Organizational Search (page 22)

Q12 Impact Plans Search

The Q12 Impact Plans Search tool allows you to search for Impact Plans relative to the current business unit and reporting period. To access this tool, click the Search button located below the Report Options area on the left side of the Q12 Impact Plans page.

NOTE: Use the Organizational Search tool (if available) to search for Impact Plans that belong to a specific business unit or reporting period.

Clicking the Search button displays the Filter search results by area, which includes numerous options to use as search criteria for locating specific Impact Plans. These options correspond with the fields available for each Impact Plan. Select an option to display additional fields by which to specify your search criteria.
The following options are available in the **Filter search results by** area:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q12 Item</td>
<td>Search for plans that focus on a specific Q12 item. Select the desired Q12 item from the drop-down list.</td>
</tr>
<tr>
<td>Mean or %5</td>
<td>Search based on a specific baseline measurement. Select Mean or %5 from the drop-down list.</td>
</tr>
<tr>
<td>Value from the Q12 Scorecard</td>
<td>Search for plans that have a Mean or %5 value that is less than, equal to, or greater than a specific value. Selecting this option displays two additional fields: a drop-down list for choosing the type of comparison you want to perform and a field for entering the value that you want to compare against.</td>
</tr>
<tr>
<td>Title</td>
<td>Search based on the title of a plan. Type the title of the plan you are searching for in the field.</td>
</tr>
<tr>
<td>Action Type</td>
<td>Search based on a plan’s type of action. Select <strong>Strength</strong> or <strong>Opportunity</strong> from the drop-down list.</td>
</tr>
<tr>
<td>% Complete</td>
<td>Search based on how complete a plan is. Selecting this option displays two additional fields: a drop-down list allowing you to choose the type of comparison you want to perform, and a second drop-down list allowing you to choose the percentage amount (in increments of 10).</td>
</tr>
<tr>
<td>Created</td>
<td>Search based on the date a plan was created. Selecting this option displays two sets of date drop-down lists, allowing you to specify a date range within which to search.</td>
</tr>
<tr>
<td>Created By</td>
<td>Search based on the name of the individual who created the plan. Type the name of the person in the field.</td>
</tr>
</tbody>
</table>

For example, if you want to limit your search to all plans with a Mean value greater than 4.00, then select > (i.e., greater than) from the drop-down list and type 4 in the field.

For example, if you want to limit your search to all plans that are more than 50% complete, then select > (i.e., greater than) from the first drop-down list and select 50 from the second drop-down list.
Last Modified On  
Search based on the date a plan was last modified. Selecting this option displays two sets of date drop-down lists, allowing you to specify a date range within which to search.

Due Date  
Search based on the date a plan is due. Selecting this option displays two sets of date drop-down lists, allowing you to specify a date range within which to search.

Search depth  
Determines the scope of your search. Select the appropriate option from the drop-down list:

This unit  
Limits your search to only those plans that belong to the current business unit.

This unit  
Limits your search to those plans that belong to the current business unit and any business units below it in the organizational hierarchy.

Search  
Click this button to perform the search based on your selected criteria.

Reset  
Click this button to clear all selections in the Filter search results by area.

Cancel  
Click this button to cancel your search and hide the Filter search results by area.

NOTE: Combining multiple search criteria creates an “and” search query. For example, selecting Q.04: Recognition from the Q12 Item field and Strength from the Action Type field creates a search query that will locate any Impact Plans that have the Q.04: Recognition Q12 item AND the Strength action type.

Viewing Search Results
Once the search is complete, the Q12 Impact Plans page lists the Impact Plans that match your search criteria. In addition, the page displays a Search Criteria area indicating the search criteria that were used.
In the **Search Criteria** area, click the **Change** button to modify your existing search criteria, click the **Reset** button to reset your search criteria and start a new search, or click the **Cancel** button to cancel your search and return to the default **Q12 Impact Plans** page.

**Sort Order**
To change the sort order of the search results, click the sort symbol above the column heading on which you want to sort.

**Printing and Exporting Search Results**
On the right side of the page are the **Printer-friendly version** and **Export to file** links. You can use these to print or export your search results, respectively.

**Printing and Exporting Impact Plans**
On the right side of the page are the **Printer-friendly version** and **Export to file** links.

Click the **Printer-friendly version** link to generate a version of the current list of Impact Plans that is more suitable for printing. Click the **Export to file** link to output your list of Impact Plans as a Microsoft Excel file (.CSV).

NOTE: If you click the **Export to file** link and your list of Impact Plans consists of multiple pages, Gallup Online will prompt you to select an option on the **Export Interim** page.

**Export Interim Page**
Select the **Export Current Selection** option to export only the list of Impact Plans that currently appear on the page. Select the **Export All** option to export the full list of Impact Plans. Click **Submit** to generate a Microsoft Excel file (.CSV).