

# Action Plan

## Introduction

An employee's Action Plan is created from the KPA's, KPI's and Competencies which was marked as Start or Stop. The Action Plan also has a section for actions that needs to be listed from the outcome of the Connect Questionnaire. Items from here are not carried over automatically.

From this Action Plan, the employee can have a clear view of what is expected from him in order to enhance his performance. It is the employee's responsibility to complete this action plan by the due date. The Action Plan is open-ended and available at any time.

## Employee and Manager Perspective

### 1. Action Plan View

- After the employee's career conversation is finalised, the action plan is formulated.

Figure 45: Employee's Action Plan

### 2. Key Performance Area Section on the Action Plan

- All items that was marked as a Start or Stop on the Key Performance Areas section on the career conversation, are carried over to the Key Performance Areas section on the Action Plan.
- On the Actions button, this item can be edited or deleted.
- The details can also be viewed.

Figure 46: Edit and delete items

- When an item needs to be edited, the following page will open.

Figure 47: Edit of Key Performance Areas

## 3. Competencies Section on the Action Plan

- All items that was marked as a Start on the Competencies section on the career conversation, are carried over to the Competencies section on the Action Plan.
- On the Actions button, this item can be edited or deleted.
- The details can also be viewed.

Figure 48: Edit and delete items on the Action Plan

- When an item needs to be edited, the following page will open.

Figure 49: Edit of Competencies

## 4. Connect Questionnaire Section on the Action Plan

- No items from the Connect Questionnaire are automatically carried over to the Action Plan, because there are no Start or Stop items
- Use the Create New Connect Questionnaire Action
- Once an item is created, this item can be edited or deleted using the Actions button
- The details can also be viewed.

Figure 50: Connect Questionnaire Actions

## 5. Create New KPA, Competency and Connect Questionnaire Action

- Additional KPA's, Competency and Connect Questionnaire Actions can be added to the Action Plan.
- The same page as for the edit opens and needs to be completed.

Figure 51: Adding new KPA's and Competencies

- Once the Action Plan has been completed, there is a message that will take you back to the dashboard.

Figure 52: Completed Action Plan

## 6. Historic Tab - Completed Actions

- Once an item has been completed, this item will be moved from the Outstanding tab to the Historic tab.
- A search filter is available to filter through records more easily.
- On the Actions button, the action's details can be viewed.

Figure 53: Historic Action Plans

## 7. Finalising the Period

- Once all preferred Career Conversations has been completed and finalised, the period, which will then be 2017 (2017-01-01 until 2017-12-31), can now be finalised.

Figure 54: Finalise Career Conversation Period

- It is important to note that once this period has been finalised, no additional career conversations can be added.
- A confirmation message will display and warn the manager of what is about to happen if he continues.

Figure 55: Confirmation to finalise period

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