

The Gallup Organization

Q¹² IMPACT Planning Tool

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Development Overview

This document describes the Gallup University tool used in conjunction with Q12 IMPACT planning.

Included in this version:

Application

- The Online Q12 Impact Plan

Views

- Manager – Detail View
- Manager – Summary View

System Requirements

Minimum System Requirements

This application offers additional functionality to the current Gallup University system. The requirements are those currently in place for Gallup University.

External Audience:

- IE 5.0>
- Netscape 4.7>
- 800x600 screen resolution
- Windows 98> OS
- MAC 8.1> OS
- Internet access
- Flash 6.0
- Adobe Acrobat 3.0> (if applicable)

The application will not support AOL 6.0>.

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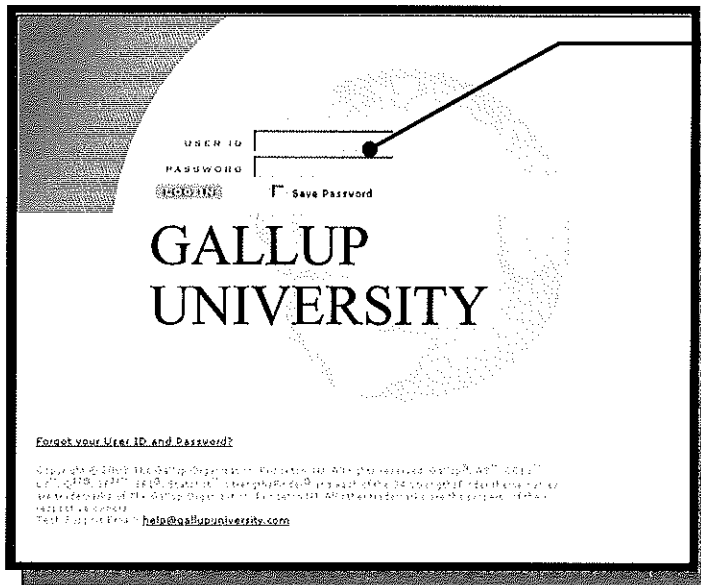
Accessing the Tool

Access to the Q12 Online Impact Plan tool is obtained through the client's Gallup University site.

1. Access the Gallup University site at the following URL

<https://www.gallupuniversity.com>

- 2.



Enter the Username and Password assigned to you via e-mail

3. Click the Login button.

A Note About Access

Generally speaking, any user will be able to add, delete and modify any of the plans for his/her business unit. Impact plans are made visible based on the security scheme selected by the client. Any user attempting to view action items for which they do not have access permissions will receive the default error message "Data were not found or you may not have permission to access these particular data. If you believe you received this message in error, please contact help@gallupuniversity.com".

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Creating IMPACT Plan Items

Upon entering the Online IMPACT Planning tool, users are sent to the **Summary View**. The **Summary View** represents the launching point for the entry, review, and updating of the Online Impact Plan. However, users may not change or update any information that appears on the **Summary View** page.

Beginning an Online IMPACT Plan

Select Q12 IMPACT Plans from the Reports> Our Workplace menu:

GALLUP ONLINE Gallup Online
username | Edit Account English Logout

Jump To: Q12 Impact Plans Gallup Overall > --choose one--

Q12 Impact Plans

Report Options
Report Period: January 2006

Add New

Page 1 of 3 Items per page: 10 Printer-friendly version

Created	Due	Item Impacted	Mean or % 5: Value
03-03-2006	08-01-2006	Q.04: Recognition	Mean: 3.65
04-11-2006	10-15-2006	Q.02: Have materials and equipment	Mean: 2.78
04-12-2006	04-12-2006	Q.01: Know what's expected	Mean: 3.76
04-13-2006	10-01-2006	Q.02: Have materials and equipment	Mean: 4.25
04-13-2006	09-01-2006	Q.02: Have materials and equipment	Mean: 4.2
06-12-2006	06-12-2006	Q.02: Have materials and equipment	Mean: 3.7
06-14-2006	06-14-2006	Q.05: Cares about me	%5: 35
06-27-2006	10-01-2006	Q.12: Learn & grow	%5: 75
06-28-2006	06-28-2006	Q.02: Have materials and equipment	Mean: 46
07-12-2006	07-12-2006	Q.01: Know what's expected	Mean: 4.15
		Smith	Opportunity 0
		Improving availability	Strength 20
		Equipment management	Strength 30
		Materials and equipment	Opportunity 30
		Care about us	Opportunity 0
		Computer Classes	Opportunity 20
		Purchased Equipment	Opportunity 0
		Impact Plan Demo	Opportunity 0

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* Denotes a Best Practice Impact Plan

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Entering Items Into an Online Impact Plan

Entry of new Impact Plan Items occurs in the *Manager Detail View* screen. The Manager Detail View screen contains two sections: one for initial entry of Impact Items and one for updating your progress on existing items. For now, we are focusing only on the portion used to create new items (depicted below).

IMPACT PLAN
** Indicates a required entry field*
Business Unit: Gallup Overall Report Period: January 2006
*** Q12 Item:**
*** Mean or %5:** *** Value from the Q12 Scorecard:**
*** Title:**
Action Type:
*** This is what we'll do:**
This is what success will look like:
How Often:
*** These people will be involved:**
Start Date:
Due Date:

NOTE: Fields with an asterisk (*) are required fields. You must enter information in these fields to create an Impact Plan item.

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Descriptions of the Fields on the Manager Detail View Screen

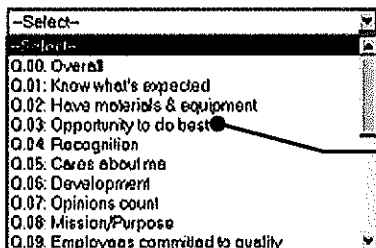
Field Name	Description
* Q12 Item	The specific question that is being impacted by the Impact Plan. A pull-down menu is included to select the item.
* Mean or %5	A pull-down menu provides the option of '%5' or 'Mean'. This represents the score of the item impacted (either %5 or Mean) from the most recent reporting period. The business unit has the choice of focusing on improvement of the %5 score or the mean score of the item.
* Value from the Q12 Scorecard	This represents the actual numerical score/value of the item impacted from the most recent reporting period. For example, if 50% of the business unit answered "Strongly Agree" to the item they want to impact, and the business unit decided to focus on the %5 score rather than the mean score for this item, then "50%" should be entered for the value. Mean Value: The mean value must be in the format of a mean score between 1.00 and 5.00 (Strongly Disagree to Strongly Agree). %5 Value: The %5 value must be in the format of a percentage score between 0 (zero) and 100.

Field Name	Description
* Title	A user-selected title to identify the Impact Plan.
Action Type	Is this item a Strength or an area of Opportunity
* This is what we'll do	A description of the action(s) for the item to be impacted. What is it that you plan to do?
This is what success will look like	A description of the expected outcomes for improving the item impacted (i.e. a numerical increase in the score for the item impacted).
How Often	A drop-down menu gives the options of weekly, bi-weekly, monthly, quarterly or other.
These people will be involved	Name or names of individuals responsible for the action.
Start Date	The date that the Impact Plan was started.
Due Date	The date when the Impact Plan is due to be completed.
* = Required Field: Impact Plan will not be accepted by the system unless an entry is made to each required field.	

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Step-By-Step Instructions for Creating a New IMPACT Plan Item

1. Click on the arrow next to the **Q12 Item** field and a drop box will appear.



Select the Q12 Item that is the focus of your IMPACT Plan Item.

2. Click on the arrow next to the **Mean or %5** field and a drop box will appear.



Select the measure that you want to improve.

3. Click on the **Value from Q12 Scorecard** field and enter an appropriate value.

Rules for Entering Values

Mean Value: The mean value must be in the format of a mean score between 1.00 and 5.00 (Strongly Disagree to Strongly Agree).

%5 Value: The %5 value must be in the format of a percentage score between 0 (zero) and 100.

4. Click on the **Title** field and enter a title for Impact Plan Item.
5. Click in the **This is what we'll do** field and type in a description of the action that you plan to take related to your Impact Plan Item.
6. Click in the **This is what success will look like** field and enter information about your goal for this Impact Plan Item. What is it that you hope to accomplish with the actions that you are taking?
7. Click on the arrow next to the **How Often** field and a drop down box will appear.



How often? Select the frequency with which you expect action on the item.

8. Click in the **These people will be involved** field and indicate who will be held responsible for completing this action.

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9. Click on the **Start Date** field and enter the date that you expect action on the item to begin.
10. Click on the **Due Date** field and enter the date on which you expect action on the item to end.
11. Click on the Submit button at the bottom of the screen to create your Impact Plan Item.

Once the submit button is selected, the program will check to be sure that entries have been made for each of the Required Items. If any of these fields are blank, you will be required to provide the missing data before your Impact Plan item is accepted.

Updating Your Progress on the IMPACT Plan

You may be required to update your progress on the Impact Plan on a quarterly basis. Updates to Impact Plan Items occur in the Follow Up section of the *Manager Detail View* screen (depicted below). All updates should be *appended* to the existing text.

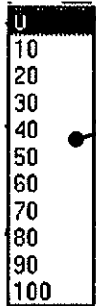
The Follow Up portion of the Manager Tracking View requires updates to just a few fields.

Field Name	Description
% Complete	The percentage of the Impact Plan that has been completed. A pull-down menu is included with increments of 10%.
Rating	A pull-down list with a scale from one to five. One represents "Poor" – the business unit feels their most recent score on this item was poor, and five represents "Excellent" – the business unit feels their most recent performance (score) on this item was excellent.
This is the progress we have made	A description of the efforts undertaken for this action item.
We have made these additional comments	Ancillary notes regarding things that could be done differently.
Notes	Any notes the business unit would like to include.

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Step-By-Step Instructions for Updating IMPACT Plan Items

1. Click on the arrow next to the % **Complete** field and a drop down box will appear.



Select the value that most closely fits your level of progress.

2. Click on the arrow next to the **Rating** field and a drop down box with the numbers between 1 and 5 will appear. Select the number that best describes your team's perception of their last score on the selected item.

1 = Team feels their most recent score on this item was poor
5 = Team feels their most recent score on this item was excellent

3. Click in the **This is the progress we have made** field and enter a description of the efforts undertaken for this action item.
4. Click in the **We have made these additional comments** field and enter ancillary notes regarding things that could be done differently.
5. Click in the **Notes** field and enter any additional comments about your progress on the Impact Plan item.
6. Click the Submit button to save your updates.

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Reviewing IMPACT Plan Items

All information entered into the Online IMPACT Planning Tool can be reviewed through the *Manager Summary View* (shown below).

GALLUP ONLINE Gallup Online
username | Edit Account English **Logout**

Jump To: Q12 Impact Plans Gallup Overall > --choose one--

Q¹² Impact Plans Q¹² Impact Plans: Organizational Search

Report Options
Report Period: January 2006

[Add New](#)

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Created	Due	Item Impacted	Action Item Title	Action Type	% Complete	Mean or % 5: Value
03-03-2006	08-01-2006	Q.04: Recognition	Customer Feedback Tool ★	Opportunity	80	Mean : 3.85
04-11-2006	10-15-2006	Q.02: Have materials and equipment	Materials and equipment ★	Opportunity	80	Mean : 2.78
04-12-2006	04-12-2006	Q.01: Know what's expected	Smith	Opportunity	0	Mean : 3.76
04-13-2006	10-01-2006	Q.02: Have materials and equipment	Improving availability	Strength	20	Mean : 4.25
04-13-2006	09-01-2006	Q.02: Have materials and equipment	Equipment management	Strength	30	Mean : 4.2
06-12-2006	06-12-2006	Q.02: Have materials and equipment	Materials and equipment	Opportunity	30	Mean : 3.7
06-14-2006	06-14-2006	Q.05: Cares about me	Care about us	Opportunity	0	%5: 35
06-27-2006	10-01-2006	Q.12: Learn & grow	Computer Classes	Opportunity	20	%5: 75
06-28-2006	06-28-2006	Q.02: Have materials and equipment	Purchased Equipment	Opportunity	0	Mean : 4.6
07-12-2006	07-12-2006	Q.01: Know what's expected	Impact Plan Demo	Opportunity	0	Mean : 4.15

Page 1 of 3 Items per page: 10 Total Results: 30

★ Denotes a Best Practice Impact Plan

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A star ★ adjacent to an action item title denotes a **best practice**. Certain administrative users have the ability to view all action items for your organization and can flag items as a best practice. All best practice items are published to the 'Q12 Best Practices' view.

Description of the Fields on the *Manager Detail View* Screen

Field Name	Description
Created	The date that the Impact Plan was created.
Due	The date when the Impact Plan is due to be completed.
Item Impacted	The specific question that that is being impacted by the Impact Plan.
Title	A user-selected title that identifies the Impact Plan.

NOTE: Clicking on the Title field will automatically take the user to the Manager Tracking View for the selected item.

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% Complete The percentage of the Impact Plan that has been completed (as reflected in the most recent update)

Mean or %5: Value The measure and value of the item that is being impacted from the most recent reporting period for the team.

Sorting Information on the *Manager Detail View*

The default view of the Manager Summary View automatically sorts the information in ascending order based on the information in the **Created** field. That is, the Impact Plan Items that were created first appear at the top of the *Manager Summary View*.

However, users can change the order in which entries appear on the *Manager Summary View* screen by choosing to sort the information. The sort function can be used on any of the fields that appear on the screen.

To change the order in which items appear, simply click on the **Sort Icons** that appear at the top of each field.



Questions?

If you have any questions regarding the Gallup site, please feel free to e-mail Gallup University's External Support Team at help@gallupuniversity.com or you may call 1-877-425-5871 (toll free in the United States) or 402-486-6005.

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