

Action Planning for Workshops

By NEIL A. STROUL and GARY SCHUMAN

Action planning is an important vehicle for maximizing the transfer of learning from the classroom to the real world. It is especially appropriate for workshops where participants will not reconvene as a group following the initial training experience. In this type of time-limited format, action planning is often the only bridge between the classroom and the job. Undoubtedly, action planning is important in the results we deliver. What constitutes good action planning? Consider the following examples:

- At three o'clock on the third day of a stress management workshop, the course leader summarizes the workshop content. Following the review, she introduces the concept of action planning as a bridge between the seminar and trainees' jobs. The leader then divides the class into small groups and asks the participants to discuss how they can use various stress management strategies when they return to their jobs.

- It is the second day of a two-day career development workshop. On the first day, participants analyzed career goals, examined available career paths and diagnosed their skills. On the second day, the workshop leader asks participants to designate career development goals and to "brainstorm" career development plans.

While action planning is included in both examples, neither design optimizes the transfer of

learning because action planning is not integrated into the overall flow of the workshop. Instead, it is treated as an afterthought.

When action planning is rushed, there is little chance to present principles as well as little opportunity to test for understanding, to answer questions or to allow for practice of skills. A more effective design allows sufficient time for participants to under-

to a structured model, but their objectives should be specific. Examples of reasonable objectives include: "Increase my skill at arguing persuasively." Or, "Incorporate the stress analysis procedure into my daily routine."

One final concern is that an action plan should be a *plan*. Many trainers inadvertently overlook the fact that an action plan is a systematic plan for applying

When action planning is rushed, there is little chance to present principles or to test for understanding.

stand and practice action planning. As a result, the quality of the action plans is improved, as is the degree of learning transfer.

When sufficient time is allotted, there still remains the question of when to introduce action planning. Many trainers present all the content areas first and then introduce action planning as a summary experience. For many participants, however, it can be disconcerting and difficult to reorient to a topic that has been closed. We have found the most effective approach is to divide the subject matter into modules and close each module with an action planning segment.

Effective action planning should be directed at achieving a well-defined objective rather than global or ambiguous goals such as "increase satisfaction" or "reduce stress." Trainees need not master the art of writing instructional objectives according

classroom subject matter in the real world. Asking participants to discuss potential applications is not an action plan. Nor is asking participants to brainstorm potential applications. An action plan should be more than a loosely connected collection of ideas. It should be systematic and action oriented.

To summarize: Effective action planning is integrated in the overall training design, follows the subject matter closely in time, is directed at a well-defined objective and produces a systematic plan of action.

The GEAR model

There are many formats which are responsive to these conditions. One such format is the GEAR model. GEAR is an acronym for Generate, Evaluate, Arrange and Refine. The GEAR model is used after participants have prepared an action planning objective derived from recently

Neil A. Stroul and Gary Schuman are psychologists with the Performance Development Corporation in Washington, D.C.

Figure 1.
Action Plan Work Sheet

Critical Outcome:	Satisfaction	Benefit	Success	Pitfalls
1.				
2.				
3.				
4.				
5.				

reviewed subject matter.

The first step in GEAR is *generating*. In this phase, participants build a pool of potential action steps and record them. Any process for generating ideas can be used, including brainstorming, delphi, the nominal group technique or any combination of individual and group techniques. Generally preferable are approaches which produce large pools of action steps.

The second step is *evaluating*. The object of evaluating is to establish a worthwhile pool of ideas. The initial step in the evaluation component is to rule out those ideas that will not produce the desired result. The ideas that remain are not equally implementable or attractive.

One must assess potential action steps against criteria for action. Ideally, the criteria are determined by such factors as the nature of the objective, the capabilities of the implementer, standards for success, costs and unique organizational considerations. If circumstances permit, evaluation criteria should be created by soliciting suggestions from the trainees and then distilling the criteria. However, it may be sufficient to evaluate the potential action steps against the following four universal criteria:

- *Satisfaction*—Will this action satisfy an individual's important personal criteria, e.g., values and personal goals?
- *Benefit*—Are the benefits to

be gained from this idea worth the effort to implement it?

- *Success*—Can the individual obtain the resources to implement this idea successfully?
- *Pitfalls*—If there are obstacles or potential problems in implementing this idea, will the individual be able to navigate around or through them?

One approach to the evaluation phase is to ask participants to generate work sheets for matching potential action steps against criteria for action (see Figure 1). When the participants have rated all the action steps, they will be able to see at a glance to what extent an idea is worthy of implementation. The more check marks an idea receives, the more worthy it is to consider implementing.

The third step is *arranging* or ordering the action steps. Individuals may be quite idiosyncratic about how they wish to arrange the steps in an action plan. The most important dimension of any arrangement is that it produce a personal commitment to the plan. To an individual, the personally arranged order promises the greatest likelihood for success. This is a subjective realm, where an individual's confidence is expressed through an enthusiastic reaction to the plan.

The final step in the GEAR model is *refining*. As the name implies, an action plan should specify actions. What does the plan require the person to *do*?

Often, the first three steps of generating, evaluating and arranging will produce a plan that is insufficiently action oriented. Refining asks the action planner to review the plan and revise the various steps so that they describe action. There are four guidelines that a trainer can suggest to a class to help produce refined action plans:

- *Pinpoint*—Ask trainees to emphasize observable behaviors. For example, ask trainees to adopt a dual perspective of both observer and actor. What would the observer see? They will have pinpointed actions.

- *Determine the sequence of action steps*—Often, what is described initially as a single action is actually a series of smaller action steps. If circumstances permit, ask trainees to specify the full sequence of action steps. At the very least, trainees should specify the initial step in any sequence.

- *Specify the time frame*—Ask trainees to determine a starting and/or completion date for each action step.

- *Establish a means for measuring progress*—Ask trainees to identify concrete indicators to measure the success of their action plans toward achieving their objectives. If an action has been successful, there should be some before and after difference. Trainees should consider what form these differences will assume and build benchmarks into their plan. Quality, quantity and timeliness are the most common indicators. Trainers should remind trainees to select realistic milestones.

The bottom line in action planning is that participants develop unique and realistic plans. In a highly structured process such as GEAR, participants feel confident that their action plans are relevant and will bear fruit. As a result, they have greater success applying what they learn.

