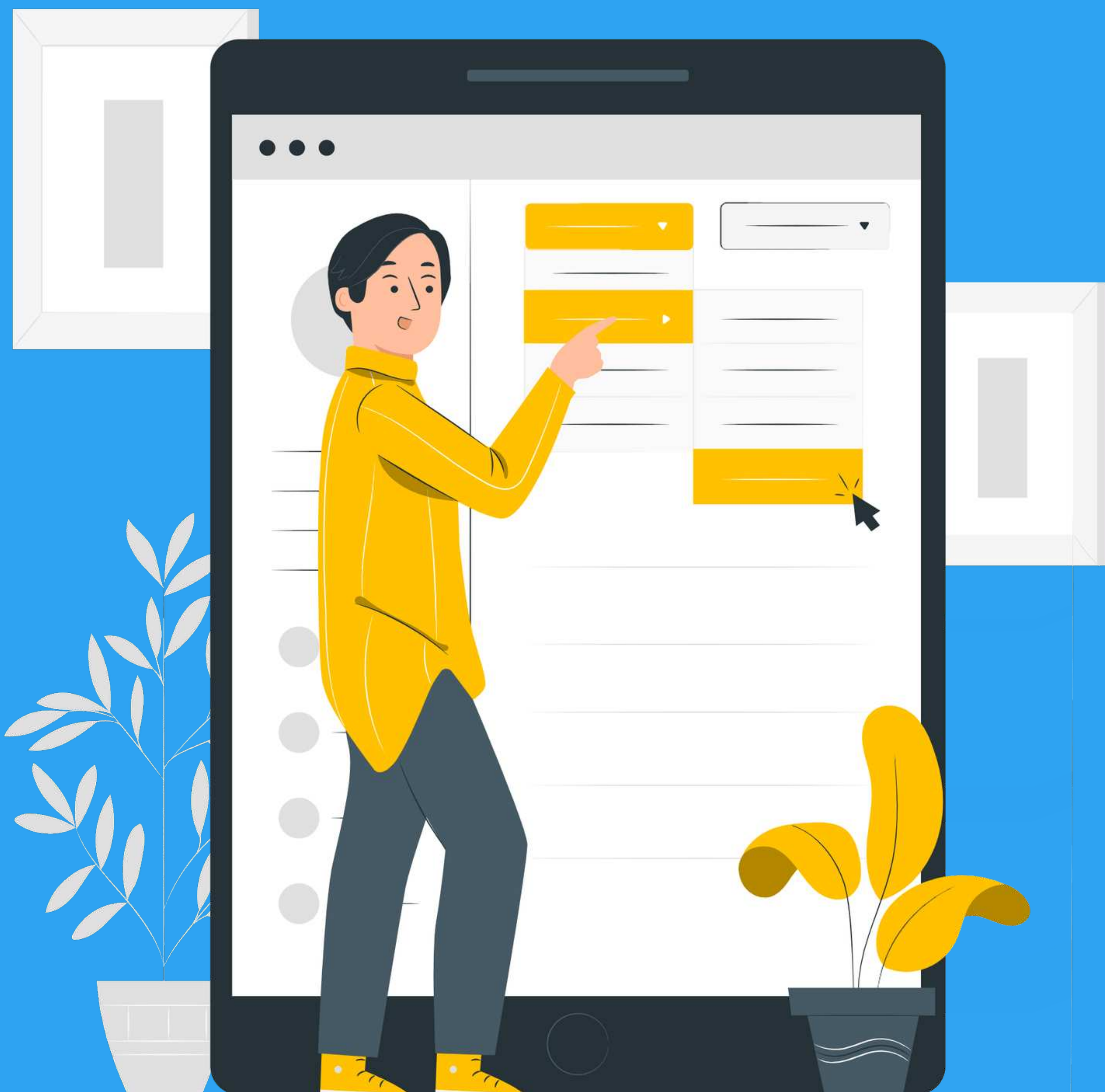




HOW TO CHOOSE WELL A TOOL FOR PILOTING OF ACTION PLANS?



Edito

An essential tool for managing a company, the action plan on paper or Excel is confronted with the digitalisation of organisations, which has accelerated considerably since the start of the pandemic in order to meet the new needs linked to remote and hybrid working.

Between the simple shared "To do list" on the one hand and the complex PPM (Project Portfolio Management) software on the other, the choice of the right tool must respond to a strategy specific to each manager, which will take into account his or her needs in terms of visibility on the progress of actions, of course, but also his or her ability to make it live with his or her employees, as many of them are weary of unsuccessful attempts to set up tools for managing action plans.

The purpose of this eBook is to help you make the right choice by asking the right questions right away to make your approach a success and a new step towards operational excellence.



”

As the CRM is the salesperson's software, the action management tool is that of the manager. It must therefore provide him with a simple means of visualising the processes and progress of actions, thus reducing the mental burden on employees and increasing productivity.

Lionel Pasco - CEO of Perfony



SUMMARY

What is an action plan?	04
The Operational Excellence Action Plan	05
The pillars for developing an action plan for operational excellence	06
Choosing the strategy	
Process management	
Structuring performance tools	
Areas for improvement	
The structure of the organisation	
Employee investment	
How to ensure the success of a project to equip a steering tool for action plans	08
Resistance to change	
Factors and forms of resistance to change	
How to accompany change?	
What benefits does an action plan management tool bring?	11
Action plan management software: how to make the right choice?	12
5 questions to ask yourself when choosing an action plan management tool	13
Why Excel and other "to do list" type tools are not enough?	14
Why use Perfony?	16

What is an action plan?



The action plan is a tool that sets out the commitments, priorities, vision and orientations of the company in a process of change, improvement or commercial conquest, presented in the form of unitary actions. This roadmap makes it possible to plan all the actions to be carried out and defines the responsibilities of the participating members.

In other words, it is a "visual programme" that the actors involved must follow. It highlights deadlines, priorities, allocated resources, the role of each team and the duration of the actions to be implemented.

To develop the action plan, team members go through a reflection process. They need to be able to identify priority actions, their implementation and, above all, to set a feasible timeframe. The implementation of the action plan will depend on the resources available, whether human, material or financial.

It should also be noted that the action plan is a management tool used both internally and externally. It plays a significant role in monitoring the progress of the actions to be implemented over time.

The action plan for operational excellence



In order to optimise the management of a company, it is necessary to use efficient and flexible methods to achieve operational excellence and manage priorities. The development of an action plan is part of this approach.

Operational excellence is an approach that is built using relevant methods that aim to improve the operations of all the company's players, in order to achieve collective performance.

To this end, the development of an action plan provides a clear and centralised vision of all the steps necessary to optimise processes in order to excel in the management of the company.

THE PILLARS FOR DEVELOPING AN ACTION PLAN FOR OPERATIONAL EXCELLENCE

The construction of a reference tool to put in place the means to achieve effective operational excellence is divided into several stages. These include the choice of strategy, the management of processes, the structuring of performance tools, the areas for improvement, the distribution of roles and the investment of employees.

The choice of strategy

The development of an elaborated strategy and action plan responds to the need to define priorities and simplify the implementation of the defined actions, in order to achieve operational excellence. This step includes the formulation of overall objectives and details that relate to the company's business mission, taking into account the environmental context. The operational excellence indicators of strategy development are based on a clear, achievable and effective global and specific vision.

Process management

Process management encompasses different models, procedures and methods, which may be in the form of tables or roadmaps. In order to achieve operational excellence, an assessment of people's needs must be carried out so that the methods used enable team members to better understand their function. The key to success is to develop simple, clear, concise, understandable and flexible tools.

Structuring performance tools

This phase consists of breaking down all the elements of the company's strategy into operational objectives and indicators. This allows management to make decisions adapted to the situation, to propose optimal actions and to measure the results against an initial objective. The structuring of tools includes business meetings, monitoring of actions, data collection and analysis, and the use of dashboards.

THE PILLARS FOR DEVELOPING AN ACTION PLAN FOR OPERATIONAL EXCELLENCE

Areas for improvement

The evaluation of a company's operational excellence is based on continuous improvement indicators that are an integral part of the roadmap. The areas of improvement are built on different components such as: steering work standards, problem solving, achieving strategic and operational objectives, eliminating waste, sharing knowledge.

The structure of the organisation

An organisational and operational pillar must be structured and allow for a global vision. It defines the responsibilities of the various actors, including all levels of the organisation, as well as all employees and partners of the company. The way in which the various actors communicate with each other is also defined. A clear definition of the framework, a clear explanation of the allocation of roles and responsibilities, and constant and appropriate communication are required.

Employee investment

The final, but perhaps most important, point in developing a relevant action plan is to involve all stakeholders in the process. Having made the decisions about what to include in the business model, the company needs to get buy-in from the very beginning. To achieve this, it is important to communicate in a participatory way, which makes sense and respects the major balances required by everyone today in order to guarantee the success of the organisational method in the long term.

How to ensure the success of a project to equip a steering tool for action plans?



Resistance to change

As with any transformation project or implementation of a technological tool, acceptance by the teams is an essential condition for measuring the success of the project.

Equipping yourself with an action plan management tool is strategic in many ways, but certain key success factors must be taken into account, such as change management.

Indeed, resistance to change is the attitude of an individual who is reluctant to accept a change, a change in his or her condition and lifestyle. It is a natural and frequent phenomenon. It is often encountered in the business world and in particular in transformation projects, especially during the implementation of a new tool or a change of method.

According to a McKinsey and Prosci study, only 30 to 50% of change projects succeed. It is obviously not easy for some employees to leave their comfort zone and their secure routines.

How to ensure the success of a project to equip a steering tool for action plans?

Factors and forms of resistance to change

Several factors can lead to resistance to change:

- **individual factors** :

apprehension of the unknown, prevalence of personal interest over the collective, fear of not being up to the task, fear of losing personal advantages...

- **collective and organisational factors**:

lack of flexibility in the organisation, fear of losing social benefits, fear of migrating to a new mode of operation and management, fear of seeing group cohesion affected...

- **factors linked to the agents of change**:

whether it is the company's management, a manager, an employee or an external consultant, the agent who initiates or leads the change may be the reason for resistance and his or her legitimacy may be questioned...

- **factors linked to the change itself**:

it may be perceived as a waste of time and energy, the costs it generates may also lead to reluctance and there may be a lack of understanding as to its benefit to the company.

Resistance to change can take different forms and prevent the adoption of the new tool by teams.

Three forms of resistance to change can be highlighted when faced with the implementation of a new tool:

1. Inertia

The employee lets people believe that he or she is committed to the change but does not do anything concrete about it, waits for it to happen and procrastinates.

2. Argumentation

The employee will show his or her reluctance through negotiations, criticism and complaints.

3. Sabotage

In the same way as inertia, except that the employee will "sabotage" the project through denigration or the circulation of false information, for example.

Although resistance to change is an intrinsic part of human nature, it is nonetheless alterable. It is entirely possible to put in place a change management strategy in order to win over a majority of employees to the project. In this respect, JC Fauvet's book on the "strategy of allies" is still relevant for understanding the key mechanisms.

How to accompany the change and successfully implement your action plan management tool?



The lack of support for employees is the primary cause of failure in digital or organisational projects. Change management is still too often neglected or botched within companies.

In the context of the adoption of an action plan management tool, resistance to change can appear among the employees concerned by it due to individual, collective or organisational factors.

Leading or accompanying change consists of putting in place actions to help the teams concerned to understand, accept, appropriate the change and adopt it or integrate it into their practices.

Thus, to support your employees in the adoption of a new action plan management tool, it is necessary to identify the needs and users concerned, to develop objectives, to carry out a diagnosis, to communicate well throughout the process, to train the teams in the new tool, to support them in their transition to using it and to ensure regular follow-up.

Finally, the interoperability of the tool is one of the success factors. It is important to ensure that the action plan management tool chosen fits well into the organisation's existing environment (e.g. integration with Microsoft Teams / Office 365) and that it is also adapted and integrated into the company's culture.



What benefits does an action plan management tool bring?

With an action plan, management is able to monitor its various activities at any time and to identify weaknesses that can be corrected in time.

It enables the tasks to be listed (so that nothing is forgotten!) and future tasks to be planned. It helps to motivate employees by involving the responsibilities of each person in the teams formed.

It helps to avoid the successive reframing of tasks which slows down activities, without forgetting that if you need to apply for funding or grants, or if you need to find partners or demonstrate the relevance of a project, it is the action plan which will be asked of you first.

Equipping yourself with an action plan management tool will allow you to obtain several benefits:

1. Reduce the mental load of your employees:

When all the actions to be carried out are entered into the tool, employees no longer need to worry about having every important piece of information in their head as they can follow this from the tool which thus takes their mind off it.

2. Giving visibility to processes:

Such a tool allows for real visibility into processes and actions to be taken in the short, medium and long term.

3. Monitor and control actions:

The tool also allows you to follow up and monitor each action, whether it has been completed or not, and what remains to be done.

4. Gain in productivity:

The tool allows you to save time on a daily basis and therefore ensure a better quality of service by delivering on time.

Action plan management software: how to make the right choice?



Choosing an effective action plan management software will propel your working group towards a serious and professional implementation of your projects. Such a tool is designed specifically for managing meetings and developing action plans.

Some points to consider when choosing your action plan management software:

- managers' and users' dashboard ;
- parameterisation and customisation of input masks;
- Possibility of attaching documents to certain actions;
- resource and cost directories;
- extraction of performance, data, statistics;
- printing of reports;
- Gantt and Kanban view;
- user portal ;
- email management;
- scalable security;
- multilingual interface;
- regular updates;
- technical support ;
- demonstration and training for users

5 QUESTIONS TO ASK YOURSELF WHEN CHOOSING AN ACTION PLAN MANAGEMENT TOOL

Initiating a change project is within everyone's reach, but to give yourself the best chance of success and avoid making the wrong choices, here are some questions

Question 1: Who will use this tool?

How many users (the more numerous they are, the more complex the project will be), what is their experience of technological tools? Do they have permanent access to a connection?

Question 2: What will be the roles of the users?

Will all users be able to access all the information?
Will they be able to act in the same way or will some need to have extended rights - can everyone do the same thing, or not? Can everyone access all the information, or not? Should there be 'for information' access to the hierarchy?

Question 3: What features are essential to fit my organisation?

Names of actions, deadlines, responsibilities, priorities are standard, but we need to anticipate and think further ahead; should there be several people involved in the same action? How can I validate the conformity of an action? Can we share or export actions? Is it necessary to provide for tree-based file management? etc.

Question 4: What are the technical constraints that your tool must respect?

Compliance with the security rules of your organisation? Data security and RGPD compliance? Need for a mobile version? Integration with your environment (M365, GSuite...).

Question 5: How to support the change?

Does the tool offer support? training? communication with users? Is it possible to import existing data?

By preparing these 5 points, even quickly, you will put all the chances on your side to choose the tool that is best adapted to your needs and your organisation and will strongly favour the support of your teams.

WHY ARE EXCEL AND OTHER "TO DO LIST" TOOLS NOT ENOUGH?

If we stick to the simplest vision, Excel can be used to manage an action plan, because it is of course possible to put together a list of actions to be taken, and to correlate them with a date and a person in charge. But is this enough?

Historisation

With Excel, there is no history of actions: when was the action created, who created it, who modified it, when etc...

In fact, if a mistake is made, it will be impossible to go back and correct it. This total absence of historical data poses a real problem, particularly for the traceability required by quality standards such as ISO 9001.

Collaboration

Excel in a shared directory is not a collaborative tool: if 2 people update the file at the same time, each one risks working on different local versions which will not merge at the time of the recording.

The version that remains will be the one saved last, as it will overwrite the data modified by the other person.

Or a new file may be created and you will have a "fork" in your action plan. Good luck getting them together again!

The online versions of Excel now allow several people to work on the same document, so this problem seems to be circumvented, but without any guarantee, since it is enough for a collaborator to download the file locally before modifying it and putting it back in the common directory, to have a risk of data disappearance.

Aggregation

It is extremely rare to work on a single action plan! A study by HBR in September 2021 shows that an employee is involved in an average of 5 to 17 projects at the same time, depending on his or her seniority.

Most of the time, each file or project has its own action plan. And Excel does not allow you to display all the action plans of all the files in which you are involved, in an aggregated way. And above all, it cannot limit the display of action plans according to the roles of the people in the organisation, and yet sales people do not have to see the HR files etc...

If we imagine creating a different file or tab for each folder, it seems very complicated to have an overview of the actions that concern us.

WHY ARE EXCEL AND OTHER "TO DO LIST" TOOLS NOT ENOUGH?

Meeting deadlines

Excel does not allow you to reliably ensure that deadlines are met. There is nothing easier than Excel to have an action plan that is always perfectly "on time" since you simply have to modify the due dates of your actions and that's it! No late actions to your credit!

It is always possible to lock cells, but this makes using the file more complex and will require a significant investment of time.

Furthermore, Excel does not record the postponements of deadlines, which are however instructive on the delay that an action takes and which can lead to modify decisions.

Segmentation

Excel does not allow you to segment information according to files or people or groups of people. If you want to control access to certain information, you will have to create as many files, in different protected folders. This will quickly become tedious and, above all, will be less fluid since, as we have seen above, Excel does not allow aggregation, so there is no transversal view!

Verticalization and dependency

Excel does not allow you to manage a tree structure of sub-files and sub-actions, mainly because of the differences in the people involved at each hierarchical level.

Nor does it allow you to create dependency links between certain actions.

While Excel is an excellent tool for many situations, it is clearly not a reliable and efficient tool for managing your action plans.

If you are looking for a simple "To Do List", for solo use, then there are many free and very practical applications.

But if you are looking for a tool to be used in teams, to manage several files or projects, offering the possibility of transversal and compartmentalized views, then you should turn to specialized solutions.

WHY USE PERFONY?



- Easily create your action plans
- Visualise the progress of your actions and those of your teams
- Reduce the mental burden of monitoring decisions
- Measure the impact and results of your action plans
- Manage your action plans directly during your meetings
- Manage the progress of your progress plans easily
- Identify and share improvement plans with your teams
- Gain mobility with MS Teams Mobile and O365 integration
- Simplify the way you manage your projects

[Request a demo](#)

Contact

Perfony is a French publisher, born from the meeting of the management consulting and IT worlds, which has set itself the ambitious project of bringing the principles of operational excellence within everyone's reach.

To achieve this, it offers a simple tool that improves the efficiency of teamwork:

- follow-up of action plans,
- traceability of decisions,
- production of meeting minutes,
- compliance with quality requirements...

Perfony is the solution that guides you towards operational excellence.



perfony

**If you would like to know more,
please contact us:**

+44 20 36 950 637
contact@perfony.com
www.perfony.com