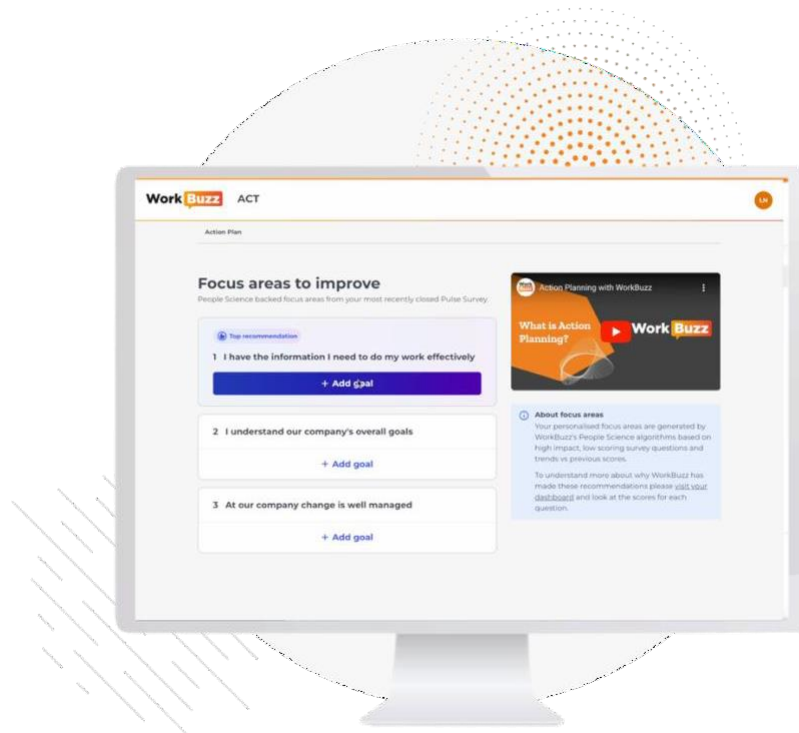


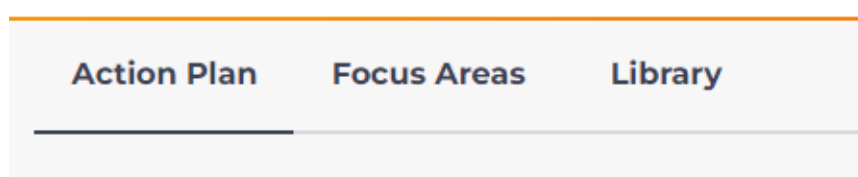
ACT Dashboard User Guide



There are 3 key areas we will cover on the ACT Dashboard:

1. [Action Plan](#) – This is where you will build your goals and actions and track progress.
2. [Focus Areas](#) – This is where the system will recommend you the 3 key focus areas based on your latest survey results.
3. [Library](#) – This is where our library of actions are stored which will give you some suggestions on what actions you could adopt to achieve your goals.

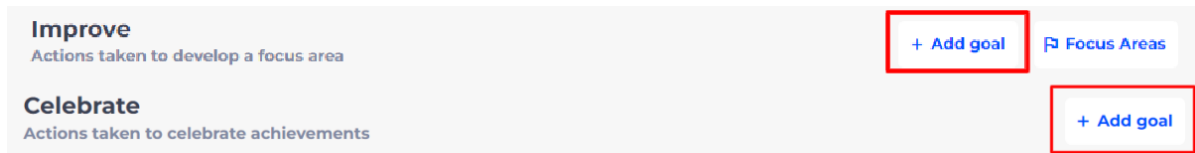
ACT



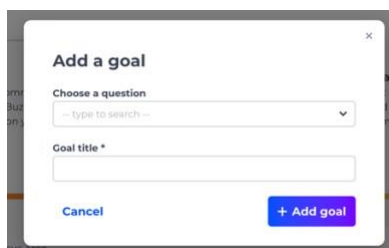
1. Action plan

Adding a goal

To add a goal, to the right of the Improve or Celebrate section, you can click on the “Add goal” button.



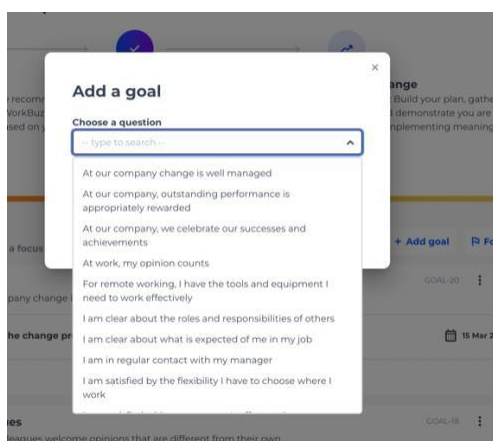
This will open up the modal below.



Click on the dropdown, you can find a list of questions from your last closed Pulse survey.

To add a goal, you can select the question to which the goal will be attached to.

You can also search for the question or by using key words, to filter the relevant question you want the goal assigned to.

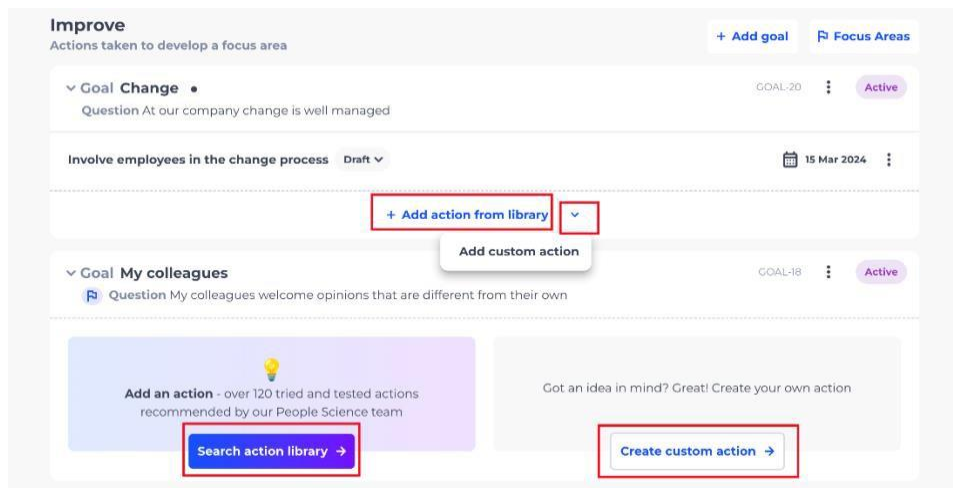


Please note that attaching a question to the goal is not obligatory, but you are required to add a goal title.

Click 'Add' to save goal which you can then view on the Action Plan page.

Adding an action

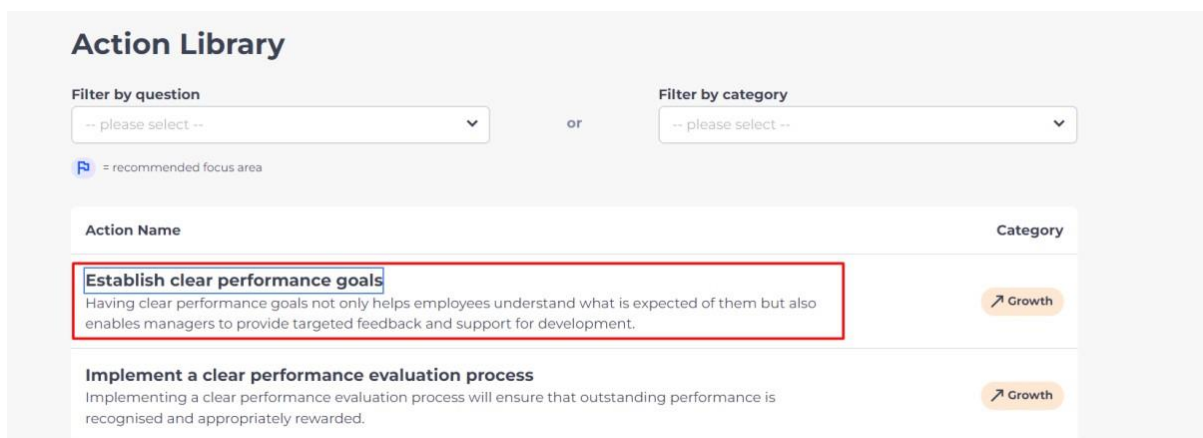
Adding an action is possible from multiple areas on the Action Plan page. Please note that actions can only be added and assigned once a goal has been created.



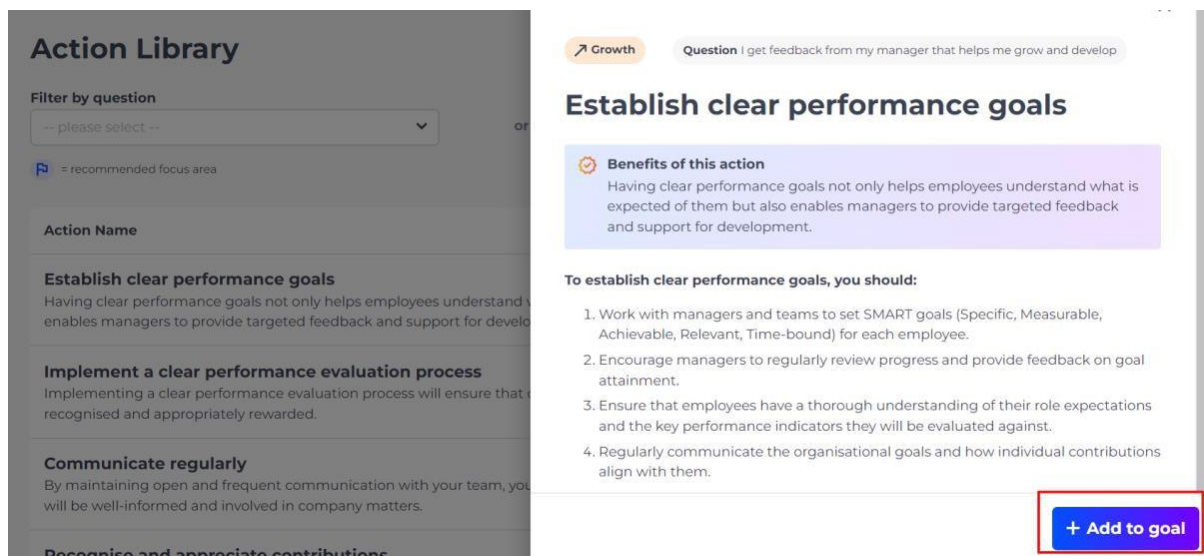
If you have a goal without actions, you will see two options, the "Search action library" and "Create custom action" buttons.

If you use the 'Search action library' button beneath the goal, it will take you to the library page with relevant actions already filtered out based on the question the goal is assigned to.

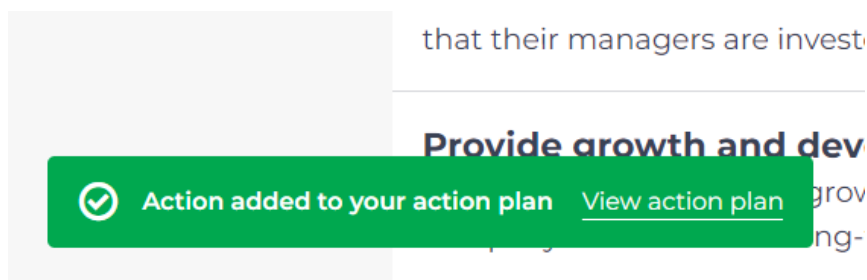
Chose relevant action and a side bar will appear detailing the action.



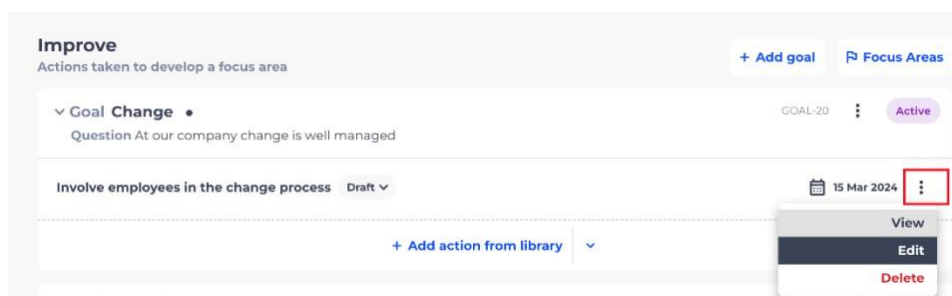
To add the action to the goal, click on the 'Add to goal' button, which will assign it to goal. You can now go back to the Action Planning Tab to view the newly added action.



Once successfully added you will get confirmation via a green pop-up message on the bottom left hand corner of the screen.

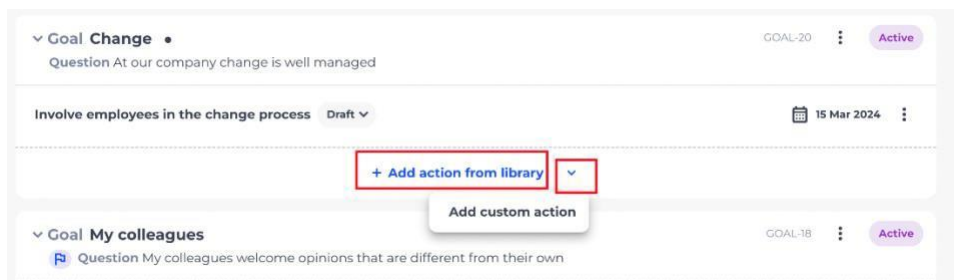


You can edit and adjust the content of the action via the “three dots” menu, and click ‘edit’, as presented below:



The alternative to creating an action via the Action Library is to select the second option which is the “Create custom action” button. This will open a side panel with a blank form for you to complete – such as the due date, action title and the description of the action you want to take.

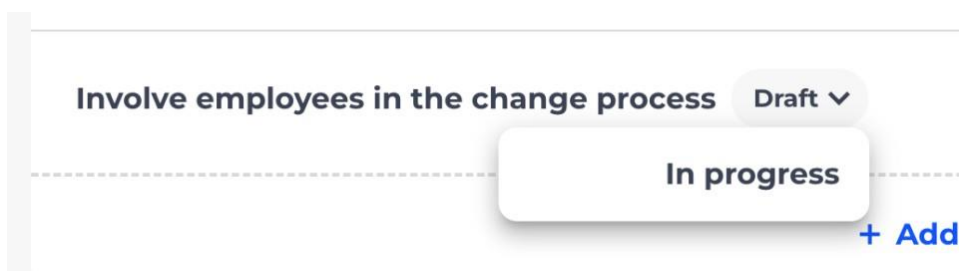
If you already have a goal created, you can add an action beneath the goals, where it says ‘Add action from library’ or click on the drop down beside it and create a custom action.



You will go through the same process when adding action as previously described.

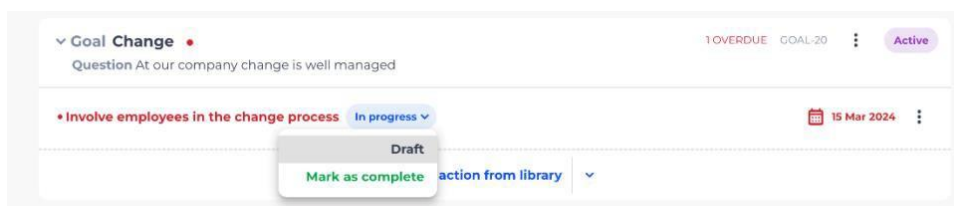
Action statuses

Newly created actions will be added and initially assigned a 'Draft' status. You can change the stage of progress via the drop down, moving it from 'Draft' to 'In Progress'.



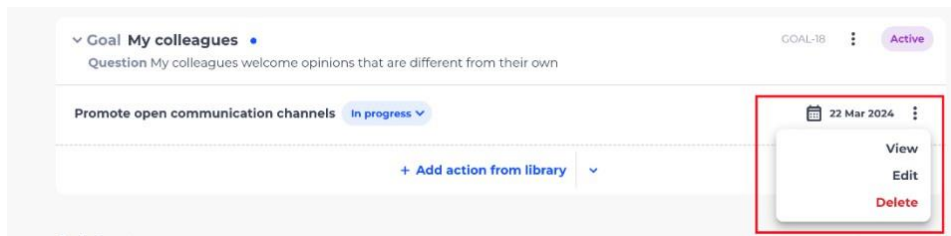
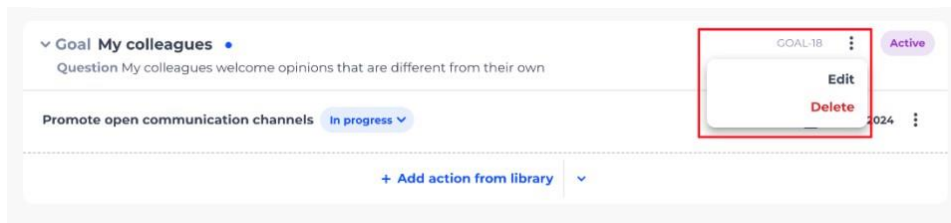
If action is already in progress status, you will then be able to see a new status available for selection which is the 'Mark as complete' status.

If a due date has passed, the action will be highlighted in red and will be marked as overdue.



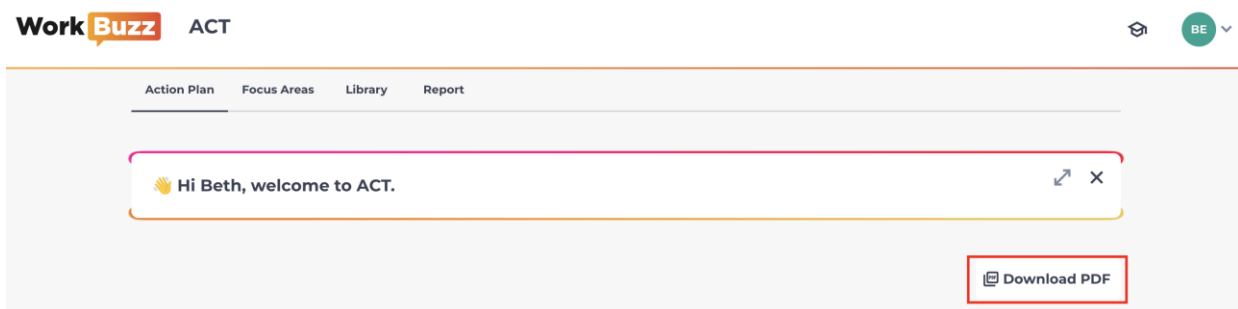
Editing Goals and actions

When you need to edit a goal, click on the three dots menu on the right side. You will be able to edit the title of the goal or delete it (if it is not completed)



If you need to edit your actions, click on three dots again and you can select view the details of your action, edit it or delete (if it wasn't completed)

Exporting action plan



When you need to share your action plan or use it in a company presentation, use 'Download PDF' button to generate your goals and actions in one pdf file.

2. Focus area

Work Buzz ACT

Action Plan Focus Areas Library Report

Focus Areas to improve

People Science backed focus areas from your most recently closed Pulse Survey.

Top recommendation

- 1 I receive recognition for good work
[+ Add goal](#)
- 2 I understand our company's overall goals
[+ Add goal](#)
- 3 ABC will act on the results of this survey to make it a better place to work
[+ Add goal](#)

Action Planning with WorkBuzz

What is Action Planning? [Work Buzz](#)

About focus areas

Your personalised focus areas are generated by WorkBuzz's People Science algorithms based on high impact, low scoring survey questions and trends vs previous scores.

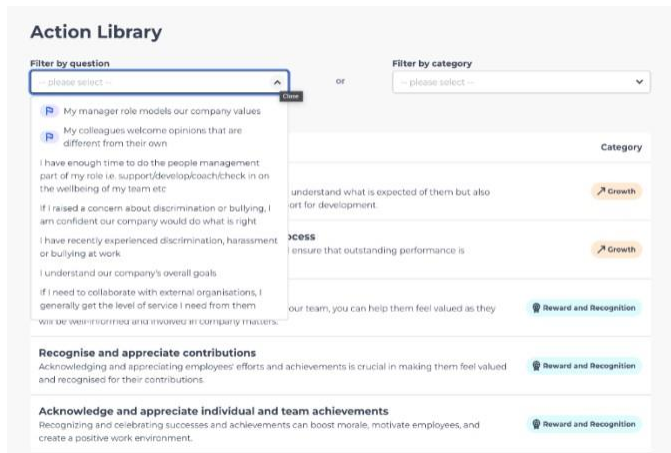
To understand more about why WorkBuzz has made these recommendations please [visit your dashboard](#) and look at the scores for each question.

[How focus areas are generated](#)

On the focus area page, you will find top suggestions given by WorkBuzz, which will lead you to most impactful questions which scored below average. You will find link to deeper explanation how focus areas are calculated.

If you are matrix manager having access to different departments, we won't provide focus area in the system. Reach out your Customer Success Manager to get in separate file, focus area for each department you have access to.

3. Library



On Library page you can search the library to inspire some of the possible actions you may wish to adopt for your own goals.

You can filter by questions (those top marked by a flag, are you focus areas) or you can search by category.

As described previously, you can edit these library action templates once added or you can revert to creating custom actions.