Introduction

Companies often conduct engagements but fail to document the results and act on information gained through the exchange. Step 5 of BSR’s five-step approach helps you avoid this pitfall. In this step you develop an action plan whose key aim is to translate the findings, insights, and agreements from the engagement into action and to communicate these actions to your stakeholders.

A Dual Action Plan

Begin by creating a dual action plan, dividing content between external and internal stakeholders. This approach helps hone your message for the appropriate audience and avoid unnecessary clutter in the final document. External actions will focus on communication, relationship building, and future engagement, and internal actions will range from improving processes and revising strategy to building further internal engagement capacity.

CREATE A LANDSCAPE

Refer back to your written engagement notes, and consider the landscape of issues that came up during engagement. Identify every output you captured, and meet it with a response that explains the rationale behind your decisions or actions—especially if your response is inaction. Your credibility and reliability rely on tackling the full landscape since participants will have inevitably focused on different outputs as priorities.

BUILD A PLAN

Build your action plan around this landscape. Develop an action for each output, making sure that it takes into account the concerns and perceptions stakeholders expressed during the engagement as well as key discussion points. Each action should define roles and responsibilities for implementation, milestones, and a realistic timeline for completion. Before issuing the plan, be sure to consult with those responsible for implementing each action.

Send It Out and Follow Up

Your action plan should also be used as a progress report for goals and objectives, informing your engagement strategy. Think back to your original objectives and ambition, and use what you learned from engagement to address the short- or long-term goals you previously set. Incorporate successes into your action plan, and analyze your unmet goals to help set realistic goals in the future. Weave this information into your plans for future engagement activities to improve the overall process.

Ultimately, communicate with your stakeholders. Build a public reporting document from your action plan that tells the whole story including prior engagement activities and noting future plans. Use this chance to demonstrate how your engagement activities and stakeholders affect your business strategy or operations. Finally, be sure to invite stakeholder feedback to further improve your engagement strategy as you loop back to Step 1 and plan future activities.