APPEL COURSE ACTION PLAN (Example)
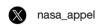
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Course Title: Managing Virtual Teams   **Instructor:** Lisa Cox

DIRECTIONS: In the first column, list the actions you plan to take in applying what you learned from the course. In the second column, indicate how you will measure your successes. Remember: the more specific your objectives and measures, the more likely you are to accomplish them.

As a result of what I learned from this course, I am going to...	I will know I am succeeding with this objective when...
Next Week: I have been charged with leading a new biweekly virtual meeting for our team. I plan to introduce the following best practices at our meeting: • Create an agenda with a purpose and goal and send it out well in advance and note participant preparation and instructions. • Record the meeting or take minutes. • Use people's names so that people know who is talking and everyone feels included. • Ask quiet participant for thoughts and encourage active participation. (*I will let the team know that I'll be assigning meeting roles at the next meeting.*)	Our meetings are more effective which means: • People come to the meeting more prepared. • We stay on target through the agenda. • Review of minutes or recordings make follow up meetings more productive. • All team members contribute their ideas and support. (*After a couple meetings, I will solicit feedback from the team and my supervisor.*)
Within One Month: Assign meeting roles per below: (*Offer coaching to those who need it and introduce the concept of rotating these roles from time to time for development purposes.*) • Leader – organizes/facilitates the meeting. • Monitor-tracks participation and makes sure all chat comments are seen, and all voices are heard. • Scribe: keeps notes and pays attention to key decision and action times. • Gatekeeper – monitors time and ensures meeting has not gone off track and meeting goals are accomplished.	• The meeting runs more smoothly and stays on track and on time. • Team member participation increases. • Key decisions are recorded and tracked. • Rotating the roles will help everyone develop new skills and participate.
Within 45 Days: • Gather input or feedback from team members regarding whether they believe the	

implementation of best practices and designated meeting roles has enhanced the effectiveness of our team meetings. • Recognize contributions of virtual team members to celebrate success.	• Feedback from team members indicates best practices have resulted in more effective meetings. • Team members seem appreciative of being recognized. • They come up with ideas to celebrate team successes.
Within 90 Days: (Feel free to extend) • Continue monitoring team reactions and soliciting ideas to improve the quality and engagement of our virtual team meetings.	• Team members are engaged and feel comfortable offering feedback and ideas on how we can continue to improve our virtual team interactions.

45-DAY FOLLOW UP: After 45 days, assess your progress.

1. **How well did you accomplish your objectives?**
   Very well. There is still room for improvement, but the quality of our virtual team interaction and productivity have increased significantly. My PM has noticed and commented on the difference.

2. **What in your work environment supported you in achieving your goals? Provide specific examples of the support where possible.**

   -My supervisor sat in on my meetings and provided coaching afterwards which helped me tremendously.
   -The feedback I received from my teammates helped me to understand what information and structure was useful for them and our meeting success.
   -Being able to refer to my course participant handbook was also helpful.

3. **What in your work environment blocked you from achieving your goals?**

   Nothing blocked me, but making these improvements does require a lot of planning and creativity. Being able to complete my regular tasks and the increased tasks relative to this activity was challenging, but the benefits I've already seen have made it worthwhile.

Check your progress.
Revisit at defined intervals.
Give a copy to your supervisor, mentor, and/or peer.