ACTION PLAN & IMPROVEMENT

Steer corrective actions and continuous improvement of your agents

LEVEL	Operational
DURATION	3h30 - 6h
USE	Correction / improvement
TRACK	Toolkit

OBJECTIVE

Turn an incident, audit or review into a concrete action plan: **identify root causes, define corrective and improvement actions, prioritize them (Effort × Impact)** and organize follow-up through to closure.

1 CONTEXT & ROOT CAUSE

AGENT IN SCOPE

PERIOD COVERED

TRIGGER (INCIDENT / AUDIT / REVIEW)

DESCRIPTION OF THE TRIGGER

ROOT CAUSE IDENTIFIED

2 CORRECTIVE ACTIONS IDENTIFIED

ACTION	OWNER	DEADLINE	SUCCESS CRITERION	STATUS

● Done ● In progress ● To do ● Blocked · escalation required

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3 CONTINUOUS IMPROVEMENT ACTIONS

INITIATIVE	EXPECTED BENEFIT	OWNER	DEADLINE

4 PRIORITIZATION · EFFORT × IMPACT MATRIX

IMPACT →

QUICK WINS High impact · Low effort	**MAJOR PROJECTS** High impact · High effort
IF TIME PERMITS Low impact · Low effort	**AVOID** Low impact · High effort

EFFORT →

TOP 3 PRIORITIES

High impact, reasonable effort.

1.
2.
3.

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5 FOLLOW-UP & EVALUATION

REVIEW FREQUENCY	NEXT REVIEW SCHEDULED	FOLLOW-UP OWNER

TRACKING INDICATORS

6 VALIDATION

ACTION PLAN OWNER	DDAO (DELEGATED DECISION AGENT OFFICER)	DATE

BEST PRACTICES

- ✓ SMART actions: a single owner, a clear deadline
- ✓ Measurable success criterion for every action
- ✓ Address the root cause, not just the symptom
- ✓ Regular reviews until complete closure

WATCH POINTS

- ! An action without deadline or owner is a dead action
- ! Too many simultaneous actions: prioritize
- ! Fixing the symptom without the root cause
- ! No follow-up means no real improvement

Next: log closed actions in the **ACF-09** register, adjust supervision with **ACF-06**, and revise the **ACF-13 mandate** if thresholds or scope have changed.

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