

Overview of the example	<p>This activity is the closing and post-training activity for a finance basics course. The course was a 4-hour course, delivered to a class size of approximately 100 participants.</p> <p>Managers of the participants were made aware that their participating employees would work on the action plan. Managers were encouraged to support and hold their employees accountable to complete this activity.</p> <p>This particular example follows a style guide for layout and brand voice established by the client.</p> <p>Note: the client's proprietary information has been masked.</p>
Purpose	<p>This is an activity to close out a training session. Participants work in pairs. As a follow-up activity, it encourages application of course content post-training.</p>
Delivery format	<p>Instructor led: ILT This can also be adapted for vILT (virtual instructor-led training) delivery.</p>
Document type	<p>Leader Guide with embedded screen shots of accompanying Participant Guide</p>
Group size	<p>This activity is taken from a course delivered to a class size of approximately 100 participants; but, it can easily be used for groups as small as 6 participants.</p>
Facilitator prep time	<p>5 minutes</p>
Delivery time	<p>20 minutes</p>
Supplies	<p>Participant Guide</p>
Tips and notes	<p>Action plans are an impactful tool for participants to use after training. Following through on action plans increases the application of knowledge or skill gained from a training session. When the participant's leader holds the participant accountable, the gain can be much more impactful.</p>

Action plan – 20 minutes

Share the value of action planning.

Direct participants to work with their pair partner and complete the items on the Stand accountable with a peer section, pages 9-10 of their worksheet.

Stand accountable with a peer

1. Identify your accountability partner.
Name:

Contact info:
2. Determine the actions you will each take as a follow-through with the information you learned in this class.
3. Set up a time for your first post-training meeting with your accountability partner.
Date:

Time:
4. In that meeting, partner with accountability peer to prepare for a meeting with manager (see share with your manager section below).
5. Once you've met with your manager, commit to meet again with your accountability partner to discuss the outcomes of your manager meeting.
Date:

Time:

Emphasize that the next set of actions should be taken with their managers when returning to work, worksheet page 9.

Share with your manager

When you return to your office, discuss the following with your manager. All page numbers are referring to pages on this worksheet:

1. Commit to two actions you will take in your role to support our business priorities. (page 1)
2. Share ways you can support EBITDA in your role. (page 3)
3. Identify actions will you take based on what you learned from the results video.
4. Ask for an opportunity to translate the message from the results video with your peers and teams based on the quarterly results video. (page 6)
5. Name actions your team can immediately take to save money and positively impact the customer experience. (page 9)

Ask for a few volunteers to share a key takeaway or ah-ha moment from today's session.

Ask for a few volunteers to share an item on their action plan that they are eager to complete.

Display slide 11, thank you.

Thank the finance facilitator for leading the finance content.

Thank all participants for their contributions and attention.