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| **Instructions** |
| **Action #**: This is simply a tracking number for each action item. It can be numerical (1,2,3…) or if you want to use an alphabetic designator to lump actions together (A1, EN2, OP5…) |
| **Action Description**: This should be as short as reasonably possible. It needs to be action oriented and descriptive enough so that you don’t forget what you were talking about in upcoming meetings. It is important that you drill down and outline the task at hand that is expected. (Example: “Update page 5 of marketing plan to reflect new product information” as opposed to “Update marketing plan”) |
| **Owner**: This needs to be designated to a specific individual, not a team. Someone you can look in the eye and say “John, you are responsible for updating page 5 of the marketing plan, do you have any questions?” This doesn’t mean that the person designated with the responsibility is the one doing all or any of the work. However, they are responsible for making sure it gets done within the timeframe mentioned. |
| **Date assigned/Due Date**: Fairly straight forward. The key point here is not to always try and designate a due date. Ask the owner of the new action, when do you think you can get this done by? This is part of the buy-in process. If they give a specific date and then can’t meet their own date, then there are no excuses. Obviously, if someone comes back with two months on something that should take two weeks don’t be afraid to trump the feedback. Note: The due date should never change once it is agreed upon. Any updates to due date should be reflected in the status/notes |
| **Status/notes**: This is where you can provide interim updates on the item status and any issues that may impact rescheduling of the action. This is a great way to communicate updates to the team |

ACTION ITEMS

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| **#** | **Action** | **Owner** | **Assigned** | **Due** | **Status** |
| 1 | Prepare and publish Meeting Rules | John Doe | 20-Jun | 7-Jul | Meeting Rules are created, will publish at first meeting held on 7 July |
| 2 | Prepare Template to take Action Items | Jane Doe | 21-Jun | 1-Jul | Initial draft prepared, meeting with John Doe to finalize 1 July. |
| 4 |  |  |  |  |  |
| 3 | Establish meeting cycle for project close out | Jane Doe | 15-Jun | 18-Jun | Complete |
| 5 | Meet with each member of the team to discuss action items | John Doe | 15-Jun | 30-Jun | Complete |
| 6 | Speak with Jane Doe about taking actions | John Doe | 15-Jun | 28-Jun | Complete |
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