INTRODUCTION: Action Item List Formats

(The Action Item example formats with descriptions start on page 3.)

What This Is

Example formats for keeping track of action items that need to be accomplished during a project. Although the concept and typical formats are simple, different teams do end up crafting Action Item List variations that suit how they want to use such lists for project tracking and communication. So we included several formats we've seen.

- Formats 1 and 2 are at a detailed level, to be used by project teams tracking detailed action items that arise each week.

- Format 3 shows an example of how organizational-type items might initially be documented in out of a major meeting and included in meeting minutes, for communicating that actions have indeed been taken to address the concerns of the group.

Why It's Useful

What gets measured (or tracked) gets done. And "the devil is in the details." There are many project details that don't warrant a task line in the schedule. On the other hand, they have to get done, and often by a certain time in order to not hold up related project activities or decisions. Action Item lists are a commonly used mechanism to record and track such details to keep them from falling through the cracks. Beyond project-specific action item lists, organizations can keep track of important actions assigned to address important work and issues like process improvement, strategy, and the like.

How to Use It

Start a detailed Action Item List as shown in Formats 1 and 2 early in a project—typically at the beginning of the Initiation phase, when multiple people are forming the new project team and getting busy on the work of the project. In fact, the Action Item List is key in the Initiation phase, because when that phase starts a schedule for tracking tasks won't exist yet.

1. Determine the format and program you want to use. The list can be implemented in a spreadsheet, a word-processing document, or a database. See the examples in this file for different formats and create your own variation if desired.

2. Assign responsibility for maintaining the list. This usually falls to the Project Manager, or a designated "project coordinator."

3. Record new actions in each team meeting.

4. Determine how you'll track action item status. Options include:

- <u>Get status in the regular team meeting.</u> Have people report status on those due by today's date, or due within the next week. CAUTION: although this approach is useful for holding people accountable to their due dates (no one really likes to have to say they're late in front of a bunch of people), it can also slow team meetings down. If you use it, insist on very brief status reporting: yes-done, no-open; a statement on plan for completing it; and for upcoming items simply whether it's on track or in trouble, and who the owner needs to work with to get it out of trouble.

Continued on next page

INTRODUCTION: Action Item List Formats (CONTINUED)

How to Use It   (continued)

- ▪ <u>Collect status offline before the team meeting.</u> For example, set a norm that team members will report status on any actions they own that are due in the next two weeks, a day before the team meeting. The Project Manager or coordinator then updates the Action Item List with that info and brings it to the team meeting for reference. The Project Manager also examines the status before the meeting and flags any items that should get highlighted to the team, or requiring discussion by the team in the meeting, so that the meeting stays efficient by only discussing those that truly need group attention/discussion.

5. Post the latest Action Item List where all team members can access it, to see status of items not covered in the meeting and always be able to see what items they have been assigned.

6. Strive to keep your completion metric (the percent of actions completed on time during each time period) at 80% or above. As a rule of thumb, when completion rates start to fall, dates are being assigned too aggressively; people aren't taking the due dates seriously; or some combination of the two. Make sure the tool is used correctly!

The action item format details start on the following page.

Action Item List Formats

This format is one of the simplest. It can be implemented in a word processing program or spreadsheet. Examples of each implementation are shown on the next page. The list below explains the fields used.

Fields:

#:   Number assigned to the action

Description or Item: Concrete, very specific description of the task to be completed.

Owner or "Who":   Person responsible for making sure the action is completed by its due date. May or may not be the person who actually executes the task. The Owner is the person held responsible, who will task other people if appropriate and report status on the action.

Date assigned: This is an optional column, but a handy one to include. Allows the team to have a record of when the action was assigned, gives visibility into how long an action has been open without resolution.

Due Date: Date by which the action item should be completed. Note: A common question is what to do in this column if an action item is NOT completed by the due date – change the due date, or leave it? Our recommendation is not to just change the date, because then you lose visibility into the fact that your original plan didn't hold. A better approach is to leave the original date, then add a new entry in the "Due Date" column of the form "Rescheduled–[new date]." The Status column can then be used to record a few words as to why the action due date was rescheduled.

Status/Notes: Place to put notes, if needed, to reflect any interim progress, issues, status, rescheduling reasons for the action. This column can be a good communication tool for action items in progress.

Date Closed: Date on which the action item was completed. Filling in this column allows you to glance at the table and see which actions have been closed; and recording the date closed, rather than just a DONE status with no date, provides a record of how the team's action item closure is doing – how many have been closed on time vs. late.

This column can also be color coded to help with give a trend visual. Some teams color the "Date Closed" column green when an action is closed on time, yellow when the action was closed late but within a week of its original date, and red if it was closed later than a week past its due date. If a team's Action Item List starts looking mostly red, it can signal issues with how aggressively action due dates are being assigned, or issues with workload, or issues with action due dates being taken seriously.

Continued on following page

Action Item List: *Example Format #1, in word processor*

No.	Description	Owner	Date Assigned	Due Date	Status	Date Closed

Action Item List: *Example Format #1, in a spreadsheet*

PROJECT1 ACTION ITEMS / OPEN ISSUES	Last Update 8/22/05 3:00 p.m. C Stern					
Sorted by due date						
1	Item		Date	Who	Status, Notes	Date complete
2	Adjust subsystem engr dates from last week's reviews		7/21/2005	**Rob, engrs**	Done	07/22/03
3	Identify how much time will be required of engineers to review their docs for pilot release		7/21/2005	**Rob**	Done	07/22/03
4	Add to schedule: wiring time for new option		7/21/2005	**Bob**	Done	07/21/03
5	Add to schedule from Ali time for cosmetics, labels, photos		7/21/2005	**Ali to Rob**	Done	07/21/03
6	Create list of user screens absolutely required for initial beta ship; ones required to be delivered sometime during beta.		7/21/2005	**Ali, Erin**	Mtg Ed, Bev, Madhu- no new screens needed for beta	07/21/03
7	Provide Rob with schedule for when those mandatory HMI screens can be done; do they impact our Beta commitment of Sept 1?		7/21/2005	**Eriin**	N/a given resolution to #6	07/21/03
8	Provide Rob with timeline info for delivery of draft manuals -- what needed for beta		7/21/2005	**Ali**	Done	07/21/03
9	Add to schedule: When will customer training be done here and what is impact on Beta ship readiness?		7/21/2005	**Rob, Bill**	Added to schedule, last week before beta start.	07/21/03
10	Get ratings on motors across temp ranges, can we promise 10 yr lifetime at high temp?		7/21/2005	**Erin**	Ratings verified. Answer is servos are rated at 10 yrs at the high range of their temp spec.	07/21/03
11	Have meeting on enclosure design, define what is acceptable for design cleanup work.		7/21/2005	**Rob to call Bill, Jerry to attend**	First meeting held to set requirements.	07/21/03
12	Check on feeder parts- are they in, anything missing?		7/21/2005	**Ali-make list; Chris- review**	List of missing goes to Don B.	07/21/03
13	Define testing details around temp issues analysis		7/21/2005	**Chris**	Done	07/21/03
14	Sensor prototype: Rework schedule to cut one week		7/21/2005	**Rob, Ali**		07/22/03
15	Identify if any other parts are needed for testing planned for week of 7-21		7/22/2003	**Chris**	CLOSED: none known.	07/21/03
16	Create list of pilot doc releases with dates, give to Wilson asap.		7/22/2003	**Rob**	almost done - will be done today	07/22/03

Format #2: Action Item List with Categories

All the columns in this table are the same as those described for Format #1 on the previous page, except for Category.

Category: Some teams include this category to make longer Action Item Lists easier to scan. Categories can be areas from your Work Breakdown, or functional groups, or other labels that map to types of work or issues.

Note also that in the description field, this team included a bolded label before the rest of the description text. This is simply another trick for making a long action item list easy to scan for items of interest to particular team members or managers.

Action Item List: Example Format #2

#	Category	Description	Owner	Date Assigned	Date Due	Date Closed
1	**International**	**Intl contact effort:** John to follow up with Tom S. offer to investigate through Asian embassies and identify correct contacts in for joint development agreement.	John R.	2-13-13		
2	**Planning**	**Schedule:** To the existing Excel master schedule, add R&D timeline of activities	Susan T.	2-13-13		
3	**Working Groups**	**R&D WG**: Form interim ad hoc working group for critical R&D activity identification. Between 17th Feb and early March, look at strategies coming out of WG, parse them into categories, decide who / how to handle, decide who will be needed in formal group.	Don W.		3-2-13	
4	**Working Groups**	**R&D WG:** Constitute formal R&D working group by mid-March	Don W.	2-13-13	3-15-13	
5	**Communication Planning**	**Communication interim plan:** Schedule presentation to staff on all the various Strategic Plan elements in an upcoming half-day staff meeting.	Carl S.	2-13-13		

Format 3: Action Items published in Meeting Results

This format is slightly different because it is meant to serve a different purpose. Whereas the above formats are geared to teams recording actions week after week and maintaining a running list, the format below is geared to communicating the major actions recorded in an important meeting.

In the project review meeting this example was drawn from, a team of Directors of various related sub-project teams and functional groups identified three major areas needing attention after the meeting. This group was in the planning phase for a major new complex project that was meshing the work of several sub-teams. It needed to ensure that each sub-team had enough administrative and other support for the major program, and developing norms for these sub-teams to work together effectively.

Therefore, the action item list included in the meeting minutes includes several gray divider rows highlighting those three areas of concern, with the related actions listed beneath them.

Action Item List: Example Format #3 - from Organization Planning Meeting

#	Who	Due	Description
SUBJECT: Planning - Creating 3-6 mo. rolling plan together that shows commitments, clear expectations.			
1	Joel R.	April 5 Directors' meeting	**Recommend steps and timeline for getting to a 3 to 6 mo. plan co-created by all sub-team Directors.** Also tell Directors what type of planning info from the sub-teams (if already in existence), would be useful for understanding their current assumptions about timing and resources.
2	Joel R.	April 12 Directors' meeting	**Gather list of major project deliverables and review with Directors the latest schedule for those deliverables**. What are expectations going forward – what will sub-teams be asked to deliver, and when, given the shift in emphasis to the 30-day high-level activity.
SUBJECT: Support contract - A contract to provide common support to the IPT's			
3	Donna B., John E.	4-1	**Scope the roles and tasks in an SOW-type format for a sub-team support contract** • Deliverables formatted, standardized, consistent across sub-teams • Administrative, calendar, and planning support for all sub-teams • Document configuration control • Rapid Reaction Force for critical issues- mechanisms • Facilitate intra- and inter-team communication
4	All Directors	4-5	Provide comments back to Donna and John on the support contract SOW
5	John E.	4-8	Deliver costing on the support contract SOW from candidate vendors
SUBJECT: Communications policy – context communications			
6	Robert R., Carl S., Joel R.	4-8	**Deliver draft of a context communications policy**. Items such as: • Meeting request communication should include context - what's driving particular meetings, not just 'please show up' • Communication about how events fit into the overall 3 to 6 mo. plan, how they meet objectives of the plan • Communication of results of key meetings including changes in direction they cause • Feedback on consolidated multi-team documents including how sub-teams' inputs will be changed, used elsewhere etc.