

QuickTip – Action Items

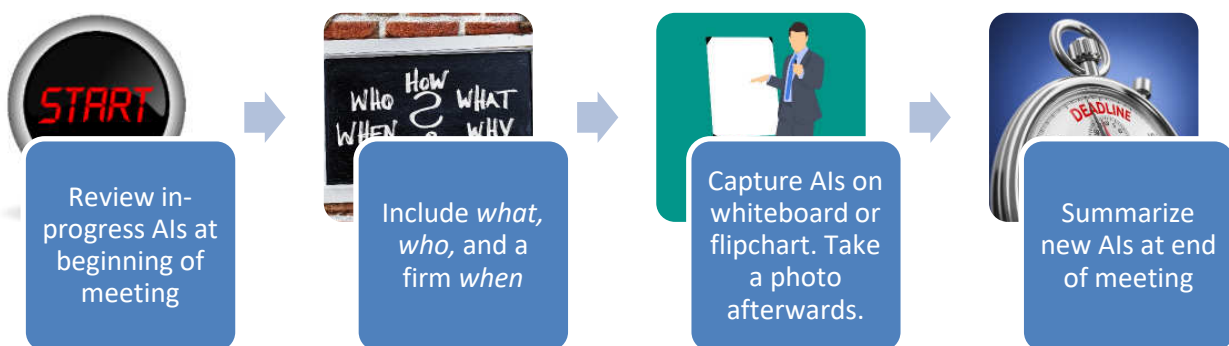
“If it’s not written down, it doesn’t exist.” You might remember hearing a colleague say this. This saying is especially relevant when it comes to meetings and facilitated sessions. You can’t follow up if you don’t capture and communicate decisions on what needs to be done, who’s doing the work and when it’s due. This is why action items (AIs) should be a key part of your meeting. (AIs are also known as ARs, which stands for “action requested.”)

When to Use

Record and follow up action items whenever a group meets to make decisions or agree on work that must be completed outside the meeting.

Procedure

1. At the beginning of the meeting, review any in-progress AIs. If they’re closed or no longer relevant, take them off the AI list or move them to an “inactive” file.
2. If new action items arise during the meeting, write them down immediately, preferably in a spot that is visible to all participants. For in-person meetings, use a whiteboard or flipchart. For virtual meetings, typing on a shared slide or virtual whiteboard works well.
3. For every action item, include what, who and when.
4. At the end of the meeting, summarize all new AIs. Don’t adjourn until the group has agreed on a responsible person (aka “owner”), next step, and due date for each one. Ask the group to verify that all AIs have been captured accurately and that they have what they need to move forward on the AIs they are responsible for. To ensure there is enough meeting time for this, include it as an agenda item.
5. Ensure that the list of AIs is written down. Distribute the list after the meeting, whether that is a photo of a handwritten list on the whiteboard or a more elaborate written log.



Considerations

1. Sometimes, in the swirl of chaos, people forget to “take AIs.” The impact is almost always misdirected energy and confusion. So, consider this a reminder of a tool that is simple but hugely effective.
2. Here is an example of an action item in the format of a written log.

Project Name: Online for All			Log owner: Jessica W.		
ID	Issue Description	Action and Status	Entry Date	Owner	Due Date
1	Department decided that Fall MBA classes will be 100% virtual. How will we replace face-to-face team exercises with something virtual that is compatible with Zoom?	Find software that enables collaborative manipulation of forms, stickies, work breakdowns, and network diagrams. 6/30/20 Status: WU EDC recommends Miro: Next step- -demo prototype to Joe	6/16/20	John S.	08/10/20
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3. Vary the style you use to “take AIs” so it fits with your organizational culture. Some organizations are very comfortable with the public clarity and accountability that this technique requires, so no one is bothered by a concise and almost-brusque style. Other organizations may place a high value on independent action or formal lines of authority, so you may need to use a softer style for this to be successful.
4. The SMART (specific, measurable, actionable, realistic, and timebound) technique can help participants state action items in a clear way. See the separate QuickTip on SMART for more information.