A Simple Method to Track Action Items

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Introduction

This paper describes a simple way to create an Action Items List for Team Project Meetings. It is Generic, and can be applied in numerous situations. The method is based upon an Excel Spreadsheet. There are several columns and a set of rows. The spreadsheet allows for the ability to sort the sheet based on a number of criteria. The spreadsheet is illustrated on the last page of this paper. You can receive an Excel Spreadsheet template for this list by sending an e-mail to carl@angotti.com

Spreadsheet Layout

This technique uses one Issue or Action Item per Row. These are added using the insert function as they come up. Adding a row, and copying an existing row can speed up the process

The columns are described as follows:

Ref. No. – A reference number that prints with the spreadsheet to indicate a specific line on the list. This is especially important for a meeting that has a number of attendees, or that is geographically dispersed. Increment this column by one to allow the reader a quick reference point. Sorting is not performed on this column so it can remain in order.

Item No. – A number that defines a numerical number indicating referencing a specific issue or action item. This is placed here when an item enters the list, in numerical order.

Date Listed – The data the item was listed. Sorting by date allows tracking of the rate of problem detection.

Estimated Done – Date when Item is expected to be completed

Actual Done – Date when Item was actually completed. This allows some tracking of problem resolution rates.

O/C – Is Item Open (O) or Closed (X). This is used to select items that are Open from those that are closed during a sort.

Note also that in row Reference No. 1 (**Bold** Issues and Action Items Pending) has a “D” in the O/C column. There is also a “T” in the same column on the row with the **Bold** “Issues and Action Items Resolved”. This allows a sort, starting at Ref. No. 1 and ending at the end of the total list to “Drive” the Closed Issues below the “Resolved Issues” line.

This is caused because “D” is less than “O” on a sort, and “T” is less than “X”. Hence, this can be used as a preliminary sort criteria to segregate Open from Closed Items.

Issues & Action Items – Description of Issue or Action

Owner – Persons that “Owns” or is responsible for the action item

Status & Remarks – The area to put general comments regarding the action item or issue. This area often needs “word wrap” turned on to be effective.

(Name of) Team Meeting Action Items

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Ref No.	Item No.	Prior-ity	Date Listed	Est Done	Actual Done	O/C	Issue / Action item	Owner	Status & Remarks
1						D	**ISSUES & ACTION ITEMS PENDING**		
2	35	H	04/03/01	04/13/01		O	Action Item #1	Joe	Problem with Vendor
3	28	H	03/30/01	04/13/01		O	Action Item #2	Bill	Problem reborn. Delayed
4	41	H	04/10/01	04/13/01		O	Action Item #3	Ralph	Who is doing this
5	43	H	04/10/01	04/13/01		O	Action Item #N	Joe	Quick Test
6	44	H	04/10/01	04/13/01		O	Action Item #N	Bill	
7	33	H	04/02/01	04/13/01		O	Action Item #N	Joe	
8	45	H	04/11/01	04/13/01		O	Action Item #N	Bill	
9	46	H	04/11/01	04/13/01		O	Action Item #N	Joe	
10	47	H	04/11/01	04/13/01		O	Action Item #N	Bill	
11	34	H	03/26/01	04/18/01		O	Action Item #N	Bill	
12	39	H	04/09/01	04/19/01		O	Action Item #N	Bill	
13	48	H	04/12/01	04/13/01		O	Action Item #N	Ralph	
14	49	M	04/12/01			O	Action Item #N	Ralph	
15	29	M	03/30/01	04/16/01		O	Action Item #N	Ralph	
16	38	H	04/04/01	04/13/01		O	Action Item #N	Joe	
17						T	ISSUES & ACTION ITEMS RESOLVED		
18	42	H	04/10/01	04/11/01	04/11/01	X	Action Item #N	Joe	
19	45	H	04/10/01	04/11/01	04/11/01	X	Action Item #N	Bill	
20	37	H	04/03/01	04/09/01	04/09/01	X	Action Item #N	Joe	
21	30	H	04/02/01	04/05/01	04/06/01	X	Action Item #N	Bill	Problems with Spec
22	25	H	03/28/01	04/04/01	04/04/01	X	Action Item #N	Bill	
23	22	H	03/26/01	04/03/01	04/03/01	X	Action Item #N	Bill	
24	20	H	03/26/01	04/03/01	04/03/01	X	Action Item #N	Ralph	Item Tracked Elsewhere
25	32	H	04/02/01	04/03/01	04/03/01	X	Action Item #N	Ralph	
26	26	H	03/28/01	04/03/01	04/03/01	X	Action Item #N	Ralph	Part of Performance Problem Debug
27	16	M	03/26/01	04/12/01	04/12/01	X	Action Item #N	Joe	