



Standard Operating Procedures

Action Plan Register

SOP0001 V3

Aug 2020

Standard Operating Procedure

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Background

Today's business world is fast paced, with a multitude of information coming at people constantly throughout the business day. This constant barrage of information will result in some actions needing to be completed. Keeping track of the status of those important actions is critical to success. Most people have lots of things to manage, which makes keeping track of all those "To Do's" essential to achieving successful results.

It is normal practice to attend meetings or workshops where people are asked to do things or take on additional tasks and responsibilities, and report back at a later date. Unfortunately, it is not uncommon for there to be no formal record of the actions and tasks that people have been assigned. As a result, follow up at subsequent meetings is often ad hoc, resulting in actions being overlooked for follow up.

This situation, if not carefully managed, can result in schedule delays, cost overruns, negative service impacts, conflict between individuals, departments, and site locations, and a high probability of key important issues not being addressed in a timely manner.

Action Plan Registers

The Action Plan Register was developed to aid teams and individuals who are experiencing difficulty keeping track of the status of activities that the team members have been assigned or have agreed to do.

The purpose of this tool is to identify the various actions to be worked on, to confirm who is responsible for which actions, and to establish the timeline for completion of those actions. The tool will assist in tracking the status of agreed upon action items. It serves as a visual reminder of the task status and maintains a record of accomplished as well as outstanding tasks.

Action Plan Registers are an effective tool at daily operations meetings for tracking short cycle items. They are also very effective for routine periodic meetings (weekly/monthly) where teams are focused on improving the current state or monitoring outstanding actions.

Standard Operating Procedure

1. Each team lead should maintain an Action Plan Register
2. The Action Plan Register should be posted in a central location as a visual reminder to all staff of current status
3. During the meeting, any due or overdue items should be reviewed
4. During any scheduled operations reviews, the area team leader should be prepared to discuss any outstanding tasks. This update should include:
 - a. what actions were added at this meeting, who were they assigned to and what is the respective due date?
 - b. what actions are due or are closed?
 - c. for overdue items, what plans are in place to get back on plan?

5. Do not review all action items at each meeting, just the new actions and those due or completed
6. The Action Reference is to be used to link the significant tasks to a central Action Plan Register. These items typically require multi departmental input
7. The meeting facilitator should be mindful of ensure actions are recorded on Action Plan Registers, and to ensure participants avoid problem solving during status review meetings. Issues that do not have an obvious solution should be documented and set over for follow up
8. Any action that will take more than 30 days should be tracked at another level; usually related to a more in-depth project planning activity
9. Action Plan Registers should be reviewed daily and /or weekly to ensure alignment of resources and priorities
10. Action status should be updated as appropriate
11. Actions that are discontinued should be kept on the Action Plan Register and marked as closed with a brief explanation in the Update / Results Achieved column
12. Completed Action Plan Register sheets should be retained as per company document retention policies. It is recommended that completed Action Plan Registers be retained for at least 1 year to allow for integration with performance management practices

Outcomes

The Action Plan Register can assist in the monitoring and managing the status of critical to success tasks. Action Plan Registers can prevent items from being overlooked or

forgotten and can provide a “heads up” or reminder to team members of pending deliverables.

This tool can increase accountability among team members, resulting in stronger teams and higher performance levels.

Sample Action Plan Register

Please see the following page.













Download the Form at: <https://ssiconsulting.ca/free-tools/>

Action Plan Register

Please refer to Standard Operating Procedures SOP0001 – Action Plan Register at <https://ssiconsulting.ca/free-tools/> for instructions and a completed sample Action Plan Register.

Company Name	<i>ABC Company</i>	Date	<i>2020-06-15</i>
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Department	<i>Marketing</i>
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Action Reference	Origination Date	Who Originated	Problem Description	Action Required / Solution	Person Responsible <small>(Contact Number)</small>	Due Date	Update / Results Achieved	Status
1	01-May-20	Team Meeting	Proposal template is outdated.	It needs a fresh look and content needs to be reviewed and updated.	Jimmy Joe	1-Jun	New proposal template developed, reviewed and approved to resolve this issue.	
2	01-May-20	Team Meeting	Need topics for articles of next newsletter.	Need to research hot topics, finalize topics and assign to team members.	Mary Joe	15-Jun	Complete	
3	01-May-20	Team Meeting	Media server is running out of disk space.	Contact IT Dept to resolve and report back to team after the issues is resolved.	Bobbi Joe	7-May	Complete	
4	13-May-20	Finance	Unexpected invoices coming in from suppliers because POs haven't been issued.	Brief team on proper procedures for obtaining POs for required services. Send letters to vendors advising them they are required to ask for a PO number.	Dave	20-May	Most of the Team has been briefed and letters have been sent. Two team members are on vacation and will be briefed when they return.	
5	01-Jun-20	Sales	Sales are slow and the sales team is asking about the possibility of a promotion of some kind to generate enthusiasm amongst the sales team and prospects.	Jimmy Joe and Bobbi Joe will come up with some ideas and float them by the rest of the team at the next team meeting. The target date for launch is the beginning of the next quarter.	Jimmy Joe Bobbi Joe	1-Jul	Theme of the promotion has been selected. Sales has been consulted and is looking forward to the promotion. Promotional material is now with the Designers.	
								
								
								
								
								
								
								



No action taken



Alternatives being developed



Solution Selected



Solution Tested



Solution Validated - expected results achieved