

SOP Template: Follow-up and Monitoring of Agreed Action Items

This SOP describes the process for **follow-up and monitoring of agreed action items**, ensuring accountability, timely completion, and effective tracking of tasks assigned during meetings or project discussions. It includes steps for documenting action items, assigning responsibilities, setting deadlines, conducting regular progress reviews, and reporting updates to stakeholders to maintain alignment and achieve project goals efficiently.

1. Purpose

To establish a standardized process for tracking and ensuring completion of action items agreed upon during meetings or project discussions.

2. Scope

This procedure applies to all team members and stakeholders involved in projects or initiatives where action items are documented and require monitoring.

3. Responsibilities

- **Action Owners:** Complete assigned tasks by the agreed deadlines and update progress.
- **Project Leader/Coordinator:** Maintain action item log, coordinate follow-ups, and organize progress reviews.
- **All Team Members:** Participate in reviews and provide updates as required.

4. Procedure

1. **Document Action Items**
 - During meetings, record each action item with a unique reference, description, owner, deadline, and related notes.
 - Use an action tracker (spreadsheet or project management tool) for consolidated recording.
2. **Assign Responsibilities**
 - Clearly assign each action item to a responsible team member (action owner).
 - Confirm understanding and agreement of responsibility.
3. **Set Deadlines**
 - Define realistic and clear due dates for each action item.
 - Document deadlines in the action tracker.
4. **Conduct Regular Progress Reviews**
 - Schedule regular check-ins (e.g., weekly or bi-weekly) to review open action items.
 - Action owners provide status updates during these sessions.
5. **Update Action Item Log**
 - Mark items as "In Progress," "Completed," or "Overdue" as appropriate.
 - Capture completion date and any relevant comments.
6. **Report Updates to Stakeholders**
 - Share a summary of open and closed action items and highlight any delays or challenges in regular reports.
 - Escalate overdue or critical issues for management attention as needed.
7. **Close Action Items**
 - Verify completion and update status to "Closed."
 - Document outcomes, lessons learned, or follow-up steps if required.

5. Action Item Tracker Example

Action ID	Description	Owner	Deadline	Status	Comments
AI-001	Prepare project kickoff presentation	Jane Smith	2024-07-01	In Progress	Draft ready for review
AI-002	Update project timeline	John Doe	2024-06-20	Completed	Final version shared
AI-003	Confirm resource allocation	Mary Lee	2024-06-28	Overdue	Waiting for management approval

6. Review and Revision

This SOP will be reviewed annually or as needed to ensure ongoing relevance and effectiveness.

Last review date: _____

Next review date: _____