

Weekly Leadership Meeting Action Item Tracker

Company: _____ Quarter: Q__ 202__

 ACTIVE ACTION ITEMS

Week of: _____

#	Action Item	Owner	Due Date	Status	Notes
1				Not Started In Progress Complete Blocked	
2				Not Started In Progress Complete Blocked	
3				Not Started In Progress Complete Blocked	
4				Not Started In Progress Complete Blocked	

#	Action Item	Owner	Due Date	Status	Notes
5				Not Started In Progress Complete Blocked	
6				Not Started In Progress Complete Blocked	
7				Not Started In Progress Complete Blocked	
8				Not Started In Progress Complete Blocked	
9				Not Started In Progress Complete Blocked	
10				Not Started In Progress Complete Blocked	

Week of: _____

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1				Not Started In Progress Complete Blocked	
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6				Not Started In Progress Complete Blocked	
7				Not Started In Progress Complete Blocked	

#	Action Item	Owner	Due Date	Status	Notes
8				Not Started In Progress Complete Blocked	
9				Not Started In Progress Complete Blocked	
10				Not Started In Progress Complete Blocked	

 COMPLETION METRICS

This Quarter

Metric	Count	Notes
Total Action Items Created		
Completed on Time		
Completed Late		
Still In Progress		
Blocked/Cancelled		
Completion Rate	____%	Target: 90%+

By Owner

Team Member	Assigned	Completed	On-Time %	Notes

 OVERDUE ACTION ITEMS

Items more than 7 days overdue:

Action Item	Owner	Original Due	Days Overdue	Blocker

Action Plan for Overdue Items:

 ACTION ITEM BEST PRACTICES

Creating Good Action Items

-  **SPECIFIC** - Clear, concrete, actionable
-  Bad: "Work on marketing"
 -  Good: "Create 3 LinkedIn posts for next week"

✅ **MEASURABLE** - You know when it's done

- ❌ Bad: "Improve customer service"
- ✅ Good: "Respond to all customer emails within 24 hours"

✅ **ASSIGNED** - One owner (not a team)

- ❌ Bad: "Marketing team will handle"
- ✅ Good: "Sarah will create the campaign"

✅ **TIME-BOUND** - Has a due date

- ❌ Bad: "Sometime next month"
- ✅ Good: "By Friday, March 15th"

✅ **REALISTIC** - Can actually be completed

- ❌ Bad: "Redesign entire website by tomorrow"
- ✅ Good: "Complete homepage wireframes by Friday"

Common Action Item Mistakes

❌ **Too Vague** - "Follow up on that thing" ✅ **Fix:** "Send proposal to Acme Corp by Thursday"

❌ **Too Big** - "Launch new product line" ✅ **Fix:** Make it a Quarterly Goal, create smaller action items

❌ **Multiple Owners** - "Sales team to review" ✅ **Fix:** Assign to one person who owns coordination

❌ **No Due Date** - "Get back to them soon" ✅ **Fix:** Specific date, not "ASAP" or "soon"

❌ **Recurring** - "Send weekly report" ✅ **Fix:** Create a process/system, not a to-do

WEEKLY REVIEW PROCESS

Monday Morning (Before Weekly Leadership Meeting)

Each Owner Reviews:

- ☐ Check status of all assigned action items
- ☐ Update progress/status in tracker
- ☐ Identify any blockers
- ☐ Flag items that need to become issues
- ☐ Prepare to report completion or challenges

During Weekly Leadership Meeting (5 minutes)

Quick Review:

- ☐ Go through each to-do from last week
- ☐ Mark as complete  or incomplete 
- ☐ Incomplete items: Drop, delegate, or move to the open issues list
- ☐ NO discussion beyond 30 seconds per item
- ☐ Capture new to-dos in Conclude section

After Weekly Leadership Meeting

Meeting Leader:

- ☐ Update tracker with completed items
- ☐ Archive completed items
- ☐ Send reminder to owners with pending items
- ☐ Flag chronic late completers for 1:1 discussion
- ☐ Review completion rates monthly



ACCOUNTABILITY TRACKING

Individual Completion Rates

Target: 90%+ on-time completion

Team Member	Week 1	Week 2	Week 3	Week 4	Avg

90%+ = Green 🟢 | 75-89% = Yellow 🟡 | <75% = Red 🔴

Action Item Categories

Track what types of action items you're creating:

Category	Count	% of Total
Customer-related		
Internal process		
Team/HR		
Strategic		
Administrative		
Other		

Insight: If >50% are administrative, you might have process issues

SMART ACTION ITEM TEMPLATE

Use this template to create crystal-clear action items:

[SPECIFIC ACTION VERB] + [WHAT] + [BY WHEN] + [FOR WHOM/WHY]

Examples:

- "Schedule 3 customer interviews by Friday to gather product feedback"
- "Send proposal to ABC Corp by Thursday with new pricing structure"
- "Complete Q1 financial report by Monday for board meeting"
- "Hire 2 sales reps by end of quarter to hit revenue targets"
- "Update website pricing page by Wednesday to reflect new plans"

RED FLAGS TO WATCH FOR

Team Patterns

- ☐ Same action items appearing week after week
- ☐ Chronic low completion rates (<80%)
- ☐ Too many action items per person (>5/week)
- ☐ No action items being created (nothing being solved)
- ☐ Action items instead of Quarterly Goals (too big)
- ☐ Action items instead of processes (recurring)

Individual Patterns

- ☐ Consistently misses deadlines
- ☐ Always marks "in progress" but never completes
- ☐ Takes on too many items
- ☐ Vague status updates
- ☐ Regularly asks for extensions
- ☐ Blames others for incompleteness

When you see red flags → Make it an Issue to solve!

PRO TIPS

Keep It Moving

- Limit to 3-7 action items per person per week
- If you have more, some should be Quarterly Goals or processes
- Review and close out old items ruthlessly
- Don't let incomplete items carry over >2 weeks

Make Them Stick

- Send automated reminders 24 hours before due
- Celebrate 100% completion weeks
- Publicly recognize top completers
- Use GoalCadence to sync with project management tools

Improve Over Time

- Track completion rates by person and quarter
- Identify patterns in missed items
- Discuss accountability in quarterly planning
- Make chronic incompletion a Team & Role Fit Assessment issue



QUICK REFERENCE

Status Codes

-  **Not Started** - Haven't begun yet
-  **In Progress** - Actively working on it
-  **Complete** - Done and verified
-  **Blocked** - Can't proceed (needs to become Issue)
-  **Recurring** - Happens every week (make it a process)
-  **Cancelled** - No longer needed

Priority Levels

-  **HIGH** - Must complete this week
 -  **MEDIUM** - Complete within 2 weeks
 -  **LOW** - Can wait if higher priorities emerge
-

Remember: Action items are the "doing" that results from your Weekly Leadership Meeting discussions. If you're not completing 90%+ every week, you have an accountability issue that needs to be solved!



Download: [Microsoft Word \(.docx\)](#)



More templates: goalcadence.com/resources