Team action plan template

A team action plan template turns a goal or a workshop decision into a short list of actions, each with one owner who has said yes, a first step, a due date and a sign that it is done. This kit gives you a blank action plan, a filled example from a fictional training team, ownership questions and a review tracker for three check-ins. The Excel version shows the days to each due date and counts overdue and completed actions.

45 minutes | 3–12 participants | Online and adaptable in person

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The outcome

In 45 minutes the team agrees one goal with a finish line, three to seven actions that each have an owner who has said yes, a first step, a due date and a sign of completion, and the dates of three check-ins.

Before the session

- For facilitators, trainers and team leads who close a workshop, a retrospective or a planning meeting with a decision that needs action. Use it with the 3–12 people who will do the work. For a whole new project, start with the project kickoff meeting agenda instead.
- Before the session, write the goal as one sentence and check it with the person who owns it. Bring the deadlines, budget limits and dependencies the team must work within.
- Prepare the action plan canvas in a shared document or on a wall, and have the ownership questions ready on screen. Decide where the plan will be stored and who will run the check-ins.
- Offer silent writing on notes or in a document before discussion, turn on captions online, and say clearly that people can accept, question or decline an action they are offered.

Included in this kit

A facilitator run of show, participant worksheets with real tables, reference tables, debrief questions, adaptation notes and a follow-up plan. Use the editable Word copy to tailor examples and prompts before delivery.

Original material by Superglue. Timings are suggestions; adjust them to your participants. This resource has not been independently evaluated.

What is inside

The participant sheets come first so you can print one page per person. Your own facilitator section follows them.

- Ownership questions — Ask these while you complete each action.
- Action plan canvas — Write the goal and the finish line first.
- Filled example: team action plan — A fictional training team moves a classroom course online.
- Review tracker — Use one status word per check-in: not started, on track, at risk, done or dropped.
- Filled example: review tracker — The same fictional plan at three check-ins on 9 October, 23 October and 6 November.
- Facilitator run of show, reference tables, debrief questions and adaptation notes — for you, after the participant sheets.

Ownership questions

Ask these while you complete each action. An action goes in the plan only when its owner has said yes.

Question	Why ask it
Who will take the first step, and have they said yes?	An action given to someone who is not present is a wish, not a plan.
What is the first step, and can it happen this week?	A small first step shows quickly whether the action is realistic.
What does the owner need from someone else?	Names the dependency so the owner can ask for it now.
What will the owner stop or delay to make room?	Time is usually the real limit, not willingness.
How will we know it is done?	A visible sign of completion prevents long debates at check-ins.
What happens if the due date slips?	Agreeing this now makes “at risk” a normal status, not a failure.
Who else needs to hear about this action?	Prevents surprises for the people the change affects.
At each check-in: is this action still needed?	Dropping an action on purpose is better than keeping it open for ever.

Actions that nobody has accepted yet, and who will ask whom

_____

_____

Action plan canvas

Write the goal and the finish line first. Then add three to seven actions. Leave the owner cell empty until the owner has said yes.

Goal, why it matters, and the finish line: how we will know we reached it

#	Action (starts with a verb)	First step	Owner (said yes)	Due	Needs	Done when
A1						
A2						
A3						
A4						
A5						
A6						
A7						

Filled example: team action plan

A fictional training team moves a classroom course online. The goal, the finish line and the capacity check are above the actions.

Worked example

Goal: run the first online version of the half-day course “Presenting with confidence” by 27 November. Why it matters: people in two regional offices cannot attend the classroom course, and 23 people are on the waiting list. Finish line: the first online group of up to 12 people has completed all three sessions, and the team has reviewed the evaluation replies. Capacity check: the lead trainer first owned three actions, so the pilot moved to the co-trainer.

#	Action (starts with a verb)	First step	Owner (said yes)	Due	Needs	Done when
A1	Redesign the course as three 60-minute online sessions	List which activities need a live group and which people can do alone	Lead trainer	16 Oct	Two days of design time	The programme manager approves the session plan
A2	Choose and test the breakout and recording set-up	Book a 30-minute test with two colleagues	Learning coordinator	23 Oct	Platform admin rights	Test recording saved and room checklist written
A3	Adapt the practice feedback sheet for online use	Draft an observer sheet with three items	Learning coordinator	30 Oct	The current classroom sheet	The sheet is tested in the pilot
A4	Run a 60-minute pilot with five volunteers	Invite volunteers from the waiting list	Co-trainer	6 Nov	A1 to A3 complete	Pilot held and after action review recorded
A5	Open bookings for the first online group	Write the course description for the new format	Programme manager	10 Nov	Changes from the pilot agreed	Booking page live and waiting list invited
A6	Deliver the first online group	Send joining details and pre-work	Lead trainer	27 Nov	A5 complete; co-trainer as producer	All three sessions held and evaluation replies reviewed

Review tracker

Use one status word per check-in: not started, on track, at risk, done or dropped. Talk only about actions that are at risk, overdue or no longer needed.

Check-in dates and who runs them

#	Action	Owner	Due	Check-in 1	Check-in 2	Check-in 3	Note or decision
A1							
A2							
A3							
A4							
A5							
A6							
A7							

Filled example: review tracker

The same fictional plan at three check-ins on 9 October, 23 October and 6 November. One action became at risk, and the team moved its date.

#	Action	Owner	Due	Check-in 1	Check-in 2	Check-in 3	Note or decision
A1	Redesign as three online sessions	Lead trainer	16 Oct	On track	Done	Done	Approved on 15 Oct
A2	Test breakout and recording set-up	Learning coordinator	23 Oct	Not started	At risk	Done	Admin rights came late; due date moved to 30 Oct at check-in 2
A3	Adapt the feedback sheet	Learning coordinator	30 Oct	Not started	On track	Done	Tested in the pilot
A4	Run a 60-minute pilot	Co-trainer	6 Nov	Not started	Not started	Done	Held on 5 Nov; review recorded
A5	Open bookings	Programme manager	10 Nov	Not started	Not started	On track	Description drafted
A6	Deliver the first online group	Lead trainer	27 Nov	Not started	Not started	Not started	Start date is 17 Nov

Facilitator run of show

1 Name the goal and the finish line | 7 minutes

Read the goal aloud. Ask: “On the due date, how will we know that we reached it?” Agree one or two signs of completion that someone could check, such as a number, a date or a document that exists. Write the goal, why it matters and the finish line at the top of the canvas.

2 List possible actions in silence | 6 minutes

Give four minutes of silent writing: each person writes actions that would move the goal forward, one per note, each starting with a verb. Then take two minutes to post the notes and remove exact duplicates. No discussion yet.

3 Choose the actions that matter | 8 minutes

Group similar notes. Ask which actions the goal cannot be reached without, and which only help. Choose three to seven. Move the rest to a “later” list instead of deleting them, so that people can see their ideas were kept.

4 Make each action concrete | 12 minutes

For each chosen action, write the first step, the owner, the due date, what the owner needs and how the team will know it is done. Use the ownership questions. The owner says yes aloud; if nobody accepts an action, it is not in the plan yet. Spend no more than two minutes per action.

5 Check capacity and dependencies | 7 minutes

Read the owner column: does one person own more than two actions? Read the dates: does an action depend on another that is due later? Ask each owner: “What will you stop or delay to make room for this?” Change dates or owners where the answer shows a real conflict.

6 Agree the review rhythm and close | 5 minutes

Set three check-in dates, for example every two weeks, and name who runs them. Agree the status words: not started, on track, at risk, done or dropped. Read the plan back once. Confirm where it is stored and who sends it today.

Reference tables

Status words for check-ins

Agree these words in the planning session so that a check-in takes minutes, not an hour.

Status	Use it when	What happens at the check-in
Not started	The first step is not yet due	Confirm that the start date still holds
On track	The owner expects to meet the due date	No discussion needed
At risk	The owner expects to miss the date or lacks something	Agree help, a new date or a smaller scope
Done	The sign of completion exists	Check the sign, then close the action

Status	Use it when	What happens at the check-in
Dropped	The team decided the action is no longer needed	Record why and who decided

Debrief and next steps

Questions for reflection

- Which action would we drop first if the team had half the time?
- Which owner has least control over their action, and what do they need from someone else?
- What will make the first check-in useful rather than a round of status reports?

Adapt the session

- For a large group, let smaller groups draft actions for one part of the goal each. Then run the last three steps with everyone, so that owners hear each other’s dates.
- Online, use a shared document with the canvas, collect silent writing in chat or a form, and read each action aloud before its owner accepts it. Make cameras optional.
- For people who prefer not to speak in a group, offer a way to accept or question an action in writing or in a private message before the plan is sent.
- For an individual action plan, use the same canvas with one owner, and ask a colleague or a manager to run the check-ins.

After the session

Send the action plan on the same day. At each check-in, discuss only the actions that are at risk, overdue or no longer needed, and the next three due dates. After the last check-in, compare the finish line with what exists, and record what the team would plan differently next time.

Questions people ask

What should an action plan template include?

A goal with a finish line, and for each action: what will be done, the first step, one owner, a due date, what the owner needs and how you will know it is done. A review tracker keeps the plan in use after the meeting.

How many actions should a team action plan have?

Three to seven for one goal. With more, owners spread their time thin and check-ins turn into long status reports. Keep other ideas on a later list.

Can an action have two owners?

Give each action one owner who says yes. Other people can help, and you can name them in the Needs column, but one person reports the status.

How often should we review an action plan?

Every one to two weeks for a plan that runs one to three months. Set three check-in dates in the planning session so that the reviews happen without a new invitation.

What does the Excel version calculate?

From the review date you enter, it shows the days left to each due date and flags overdue actions. It counts the actions that are done, at risk and overdue, and the share completed.

What is included in the free and editable files?

The open PDF has the ownership questions, the action plan canvas, the review tracker, filled examples of both and the 45-minute planning session. Subscribers also receive the editable Word file, the Excel workbook and a CSV of the example plan.

Use and sharing

Free to use and adapt in your own training sessions, including paid client work. Do not resell or redistribute the unmodified download as a standalone product. Share the resource page instead.