**SOP :Action Register Maintenance**

**Configuration Management**

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| **Document Name** | 04-SOP :Action Register Maintenance | | |  |
| **Created/Change by** | **Date** | **Reviewed By** | **Review Date** | **Version** |
| Hari Thapliyal | 25-Apr-18 | Viswanathan | 25-Apr-18 | V1.0 |
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**Purpose**

How and when to update action register? What else goes inside action register? How to share action register with stakeholders?

**Audience**

* PMO head
* HoDs

**Guidelines**

1. Prepared by: Meeting Recorder
2. Action Register should be maintained for all kind of meeting like
   1. Client meeting
   2. Monday Project Review Meeting
   3. Retrospective Workshop
   4. PMO Review
   5. Phone Call
   6. Vendor Email
   7. Customer Email
   8. Business Review Meeting (BRM)
   9. Training Follow up action
3. Action Register has 4 types of records
   1. MoM (General Information)
   2. Action
   3. Attendance
   4. Decision
4. How to maintain Action Records
   1. An action record must have owner, due date
   2. If “due date” of action is changed then revised due date must be entered and “Earlier Commitment” copy information from “due date”
   3. If revised date is again changed then “revised due date” should be appended to “Earlier Commitment” and new “revised due date” must be entered in “revised due date” field
   4. In “Earlier Commitment” field first information should be “counter” of commitment change. For example earlier “due date” was 1-Mar-18 and now revised due date is 5-Mar-18 then “Earlier Commitment” should have information in this format. 2: 1-Mar-18, 5-Mar-18. Please mind the Date format, space, comma between, colon between and counter “2” first.
5. How to maintain Decision Records
   1. It should not have due date.
   2. It may have owner name.
6. How to maintain MoM Record
   1. No due date
   2. No owner name
7. How to maintain Attendance Record
   1. Must have start date & end date
   2. No due date
   3. No Owner name
8. Action register shall be updated before the next meeting. Only action records shall be updated. Action records shall be updated either by action owner or Meeting Recorder or PM.
9. Action owner is responsible for doing the work or getting the work done within his/her department. Accountability of the action is with PM. So s/he must do the follow up or escalate to next level if delay is beyond the acceptable limit.
10. PM many need to update risk or issue register based the input from Action Register.
11. No action shall be deleted from the list. Status of action can either of following
    1. Closed
    2. Open
    3. Differed
    4. Cancelled
12. Action register must be live. It shall not happen that action is due in past and showing still open in the action register.
13. Action register shall be prepared either during the meeting or maximum within 24 hours post meeting
14. Before making decision that what kind of record is this ask yourself
    1. Any work is required?
    2. Some information given by somebody in the meeting?
    3. Team or Management making some decision?

**Inputs**

Any of the following

1. Client meeting
2. Monday Project Review Meeting
3. Retrospective Workshop
4. PMO Review
5. Phone Call
6. Vendor Email
7. Customer Email
8. Business Review Meeting (BRM)
9. Training Follow up action

**Steps**

1. Confirm the action with owner before meeting recorder document that as an action.

**Exit Criteria**

1. No spelling error
2. No double meaning
3. No grammatical mistake
4. All relevant fields are filled for all the records entered
5. All the items are documented

**Validation**

1. Action register is send to all the stakehodlers