MY WORKSHOP TOOLS™



FACILITATOR GUIDE

# ACTION PLANNING

*How to turn workshop energy into real-world results*

# Overview

A workshop that ends without a clear action plan is a conversation, not a catalyst. This guide gives facilitators a complete toolkit for converting workshop discussion into committed actions: how to capture decisions in real time, how to assign ownership without ambiguity, how to prioritize when everything feels urgent, and how to build in the accountability that turns good intentions into follow-through.

Effective action planning is not something that happens in the last five minutes of a session — it is woven into the fabric of how a skilled facilitator runs the room from start to finish. This resource covers the most common reasons workshop actions fail to materialize, the techniques that prevent those failures, and the practical tools — templates, phrase banks, worksheets, and a ready-to-use action summary email — that make follow-through systematic rather than hopeful. Whether you are facilitating a two-hour team alignment session or a full-day strategy workshop, the principles here apply directly and immediately.

NAVIGATION

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INTRODUCTION

# The Momentum Problem

Picture this. Six weeks after a workshop, someone in the hallway asks: *"Whatever happened to those ideas we came up with?"* There's a pause. A few people look at each other. Someone says they think Maya was going to look into it. Maya doesn't remember agreeing to that. The notes from the session are buried in someone's inbox — or worse, living in a sticky-note photo that nobody can read. The momentum is gone. The ideas were good. The conversation was real. But nothing happened.

If you've been in that situation — or caused it, even with the best intentions — you're not alone. It is one of the most common and most preventable outcomes in facilitated sessions. And it is, fundamentally, a facilitation problem.

This guide is written directly to you, the facilitator. Not to the participants, not to the sponsor, not to the HR team that commissioned the session. To you. Because while many factors influence whether workshop actions happen, the facilitator has more leverage over that outcome than anyone else in the room. The way you close a discussion, how you capture decisions, how you name an owner, and whether you schedule a follow-up before people leave — all of that is yours to shape.

**Action planning is not an afterthought.** It is not the last item on the agenda that gets compressed when you've run out of time. It is a core facilitation responsibility, as important as your opening icebreaker or your discussion questions. A workshop that produces rich conversation, but no action plan has not delivered on its promise. The participants gave their time. The organization invested in the session. They are counting on outcomes, not just energy.

This resource gives you the specific tools, language, and techniques to make that happen — consistently, confidently, and without turning the end of a workshop into a bureaucratic exercise that kills the mood. Done well, action planning energizes a group. It makes the work feel real. It converts the abstract into the concrete. And it is the single best predictor of whether anything changes after you pack up your markers and go home.

Let's get into it.

SECTION 1

# Why Action Planning Fails

## The Four Reasons Workshop Actions Don't Happen

After facilitating many workshops, the pattern is remarkably consistent. Actions fail for the same four reasons, repeatedly. Knowing them doesn't just help you diagnose what went wrong — it gives you a precise checklist for what to get right.

1. **No owner — "we" agreed but nobody is responsible.**
   The group liked the idea, everyone nodded, and it went on the list as a collective intention. But "we will create an onboarding checklist" is not an action — it's a wish. The moment a task belongs to everyone, it belongs to no one. Without a single named human being accountable for an action, it will wait forever for someone else to go first.
2. **No deadline — it's important but not urgent, so it waits forever.**
   "As soon as possible" is not a deadline. Neither is "next quarter" or "when things calm down." Without a specific date attached to an action, it competes with every other priority in a person's week — and the priorities with hard deadlines always win. Good intentions without a calendar date are just intentions.
3. **No definition of done — nobody knows when the action is complete.**
   "Improve communication" and "look into the training options" are not actions — they are directions. Without a clear, testable outcome, people genuinely don't know when they've finished, which makes it easy to deprioritize indefinitely. A well-formed action has a visible, confirmable endpoint: *Draft a communication protocol document and share it with the team within 2 weeks*.
4. **No follow-up mechanism — actions were recorded but never reviewed.**
   The notes were sent. The list was distributed. And then… nothing. Nobody checked. Nobody asked. The actions sat in an email thread that everyone read once and archived. Without a scheduled review — a meeting, a check-in, a shared tracker — there is no social pressure, no visibility, and no accountability. The action plan becomes an artifact, not a tool.

## The Difference Between a Decision and an Action

These two things are often confused in workshops and conflating them creates real problems downstream. A **decision** is a choice that has been made — it records what the group agreed. An **action** is a commitment to do something — it records what will happen next and who will make it happen.

*"We decided to move to monthly reporting"* is a decision. *"David will update the reporting template and share it with the team by November 1st"* is an action. Your job as a facilitator is to ensure that decisions don't stay as decisions — that someone always asks: *So, what needs to happen now to make this real?* That question is the bridge between conversation and change.

## The "Good Feeling" Trap

Workshops can feel extraordinarily productive — and genuinely be unproductive at the same time. This is the **Good Feeling Trap**. When a session has good energy, honest conversation, creative ideas, and genuine connection, participants leave feeling like something significant happened. And something did happen — inside the room. The trap is mistaking that internal experience for external change.

The feeling of productivity is generated by discussion. The reality of productivity is generated by action. A facilitator who mistakes participant enthusiasm for organizational progress will consistently produce sessions that feel great in the moment and deliver little in the weeks that follow. The antidote is simple but requires discipline: never let a workshop end without named owners, real deadlines, and a plan to follow up.

## What Real Action Planning Looks Like

Real action planning is not a five-minute scramble at the end of a session. It is an ongoing discipline that runs through the entire workshop. It means capturing candidate actions as they emerge, not just at the end. It means asking clarifying questions in real time — *Who owns this? By when?* — before a discussion closes. It means making the action log visible to the room throughout the session, not just recording it privately. And it means closing the session with a clear, confirmed list that every participant has seen and agreed to.

The sections that follow give you the specific techniques to make this happen, from the first discussion to the follow-up email forty-eight hours later.

SECTION 2

# Capturing Decisions and Actions in Real Time

## The Facilitator's Documentation Role During the Session

Your primary job is to facilitate — to guide the conversation, manage dynamics, ask good questions, and keep the group on track. But documentation is not separate from that job; it is part of it. Every time a decision is made, or an action is agreed upon in your session and you don't capture it visibly, you create a gap between what the group thinks happened and what actually got recorded. That gap is where momentum goes to die.

Think of real-time capture not as clerical work but as a facilitation move. When you write something on the board and say, *"Let me make sure I've got that right,"* you are doing three things at once: confirming accuracy, validating the speaker, and signaling to the room that this matters enough to record.

## What to Capture and What to Let Go

Not every word spoken in a workshop is an action. The skill is knowing the difference between **discussion content** (ideas, opinions, context, stories) and **actionable content** (decisions, commitments, next steps). You do not need to transcribe everything — that is the note-taker's job, not yours.

What you are listening for, as a facilitator, are moments of convergence: when the group reaches a conclusion, makes a choice, or agrees that something should happen. Those are the moments to surface, name, and record. Everything else can live in the notes.

| Capture This | Let This Live in the Notes |
|---|---|
| Agreed decisions ("We will move to weekly check-ins") | Background context and reasons discussed |
| Named actions with an owner and a date | Ideas that were raised but not agreed upon |
| Parking lot items deferred for later | Side conversations and tangents |
| Prioritized items the group selected | Individual opinions that didn't reach consensus |

## The Live Action Log

The **Live Action Log** is the single most effective tool for ensuring workshop actions survive the session. It is a simple, visible table — on a flip chart, a whiteboard, or a shared screen — that stays up throughout the session and is updated in real time as actions are agreed upon. Because it is visible to everyone in the room, it creates immediate shared accountability: participants can see what has been captured, correct anything that's wrong, and add items themselves.

The Live Action Log format is deliberately simple. Three columns. Nothing more.

| ACTION | OWNER | BY WHEN |
|---|---|---|
| *Draft revised onboarding checklist* | *Priya* | *[Specific Date]* |
| *Share training options with the team* | *Marcus* | *[Specific Date]* |
| *Schedule monthly reporting meeting series* | *Lee* | *[Specific Date]* |

At the end of the session, this table becomes the core of your action summary email. It also serves as the check-in document at future meetings. Set it up at the start of the session, make it visible, and keep it updated throughout.

## Designating a Note-Taker vs. Capturing Yourself

There are two valid approaches, and the right one depends on your session size and setup. If you have a **designated note-taker**, your job becomes lighter: you facilitate, they capture, and you check in periodically to confirm accuracy. Give your note-taker a clear brief before the session — specifically, the Live Action Log format and the instruction to flag any action that doesn't have a named owner and a date.

If you are **capturing yourself** — common in smaller sessions or when resources are limited — keep your capture tool front and center and be disciplined about pausing discussion momentarily to write things down. Never try to facilitate and mentally remember what needs to be captured at the same time. It doesn't work. Write it down as it happens, visibly, where the room can see it.

## The "Before We Move On" Technique

This is one of the most useful phrases in a facilitator's toolkit. Before closing any significant discussion — particularly one that generated candidate actions or decisions — you pause the conversation and use a crystallizing phrase to surface the commitment explicitly. It prevents you from moving to the next agenda item with an important action still floating, unrecorded, in the air.

**Phrase Bank — "Before We Move On"**

*"Before we move on — what's the action here, and who's taking it?"*

*"Let me capture this. We're agreeing that [restate decision]. Does that sound right? And who owns making that happen?"*

*"Just before we shift to the next topic — is there anything from this conversation that needs to go on the action log?"*

*"We've had a really good discussion here. What's the one thing we're committing to because of it?"*

## What to Do When Actions Are Unclear

Sometimes a discussion ends with a general sense that "something should happen" but no clear action has crystallized. Resist the urge to let it slide and capture a vague placeholder. Instead, ask a clarifying question that surfaces the commitment without pressuring anyone. Try: *"If someone were going to pick this up this week, what would they actually do first?"* or *"What would 'done' look like for this one?"* These questions move the group from intention to specificity without making anyone feel put on the spot.

SECTION 3

# Ownership and Accountability

## "Someone" Is Nobody

It bears repeating because it keeps happening in every workshop, in every organization, at every level. When an action is assigned to *the team, we,* or *everyone,* it belongs to no one. Shared ownership sounds collaborative and inclusive, but it is functionally the same as no ownership at all. The moment people leave the room, they each assume someone else is handling it. Nobody does. The action disappears.

## The Single-Owner Rule

The **Single-Owner Rule** is simple: every action has exactly one person accountable for its completion. That person may have teammates supporting them. They may delegate parts of the work. But when the review date arrives, there is one human being who can say *done* — or explain why it isn't. Others can be **supporters** (people who contribute to the work) or a **reviewer** (someone who checks the outcome), but the owner is singular, named, and agreed upon before the session ends.

This is not about blame if something doesn't happen. It's about clarity, so that one person knows they are the one to move first — and everyone else knows who to ask if they want a status update.

## How to Assign Ownership Without Drafting People

Nobody wants to leave a workshop having been volun-told into a project they didn't sign up for. The goal is willing owners, not drafted workers. The most effective technique is to open ownership with a question before you offer a suggestion. Ask the room: *"Who's best placed to lead this one?"* or *"Does anyone feel a strong connection to this action?"* Pause and wait. Silence is okay here — don't rush to fill it. Most of the time, someone will step forward within a few seconds.

If the action connects naturally to a specific role or function, you can name it gently: *"This feels like it sits closest to the HR team — does that make sense?"* Always frame it as a question, not an assignment, and confirm enthusiasm before moving on.

## What to Do When Nobody Volunteers

Occasionally, a genuinely useful action will sit in the air with no takers. When this happens, resist the instinct to assign it. Instead, ask a diagnostic question: *"Is there something about this action that feels unclear or unrealistic?"* Sometimes the lack of volunteers signals that the action is poorly defined, outside anyone's authority, or simply not as prioritized as the discussion made it seem. Surface the real issue rather than forcing a reluctant owner. A reluctant owner is barely better than no owner at all.

## Ownership Phrases That Work

**Phrase Bank — Inviting Ownership**

*"Who would feel comfortable taking the lead on this one?"*

*"This seems to sit in your area, [Name] — would you be willing to own it, or would you prefer someone else take it?"*

*"Is there someone here who's already thinking about this outside of this room?"*

*"Who wants to be the person we come back to on this at the next check-in?"*

*"This one needs a champion. Who's up for it?"*

## The Accountability Triangle: Owner / Supporter / Reviewer

For complex actions, it can help to make the structure explicit using what we call the **Accountability Triangle**. Each role is distinct, each is named, and together they create a lightweight accountability system without requiring a formal project management structure.

**THE ACCOUNTABILITY TRIANGLE**

| OWNER | SUPPORTER(S) | REVIEWER |
|---|---|---|
| Accountable for completion. Moves first. Reports status. | Contributes time, skills, or resources. Not accountable for delivery. | Checks the output. Confirms completion. Provides feedback. |

## Setting Realistic Deadlines

The most common deadline mistakes in workshop settings are setting everything due "in two weeks" regardless of complexity and setting deadlines so far in the future that they have no urgency. A good deadline is the earliest date by which the action could realistically be completed, given the owner's existing workload. Ask the owner directly: *"What's a realistic date for you?"* Then gently challenge if the answer seems either too aggressive or too relaxed. A date that the owner sets themselves is far more likely to be kept than one imposed by the group.

SECTION 4

# Prioritization

## Why Everything Feels Like a Priority After a Workshop

There is something about a good workshop that makes every idea feel urgent. The energy is high. The conversation has been rich. People are engaged and optimistic. In that context, every action item that surfaced feels important — because in the room, it was. The problem is that the room is not the real world. Back at their desks, participants have inboxes, deadlines, and a thousand competing demands. The twenty things that felt equally critical at 3pm on a workshop day will look very different at 9am on Monday.

## The Priority Problem

When there are twenty action items and realistic capacity for five, a long action list is not a plan — it's a wish list. The facilitator's job is to help the group focus. This requires a brief, structured prioritization exercise before the session ends. Without it, people will either try to do everything (and burn out or drop most of it) or do nothing (paralyzed by the volume). Either way, the list fails. A focused list of five real actions will always outperform a sprawling list of twenty notional ones.

## Three Prioritization Methods for Workshop Settings

### 1. Dot Voting

**Dot voting** is the fastest, most visual, and most democratic prioritization method available in a workshop setting. Each participant receives a small number of sticky dots (or can draw dots with a marker). They then place their dots on the action items they believe are most important. No discussion required during voting — the dots do the talking. Results are visible immediately.

**How to run it in 3 minutes:**

- List all candidate actions on a flip chart or whiteboard.
- Give each participant three dots (fewer if the list is short).
- Ask everyone to vote simultaneously — no discussion during voting.
- Count the dots. Items with the most votes rise to the top.
- Confirm with the group: *"Does this ranking feel right?"*

### 2. Impact vs. Effort Matrix

The **Impact vs. Effort Matrix** is a simple 2×2 grid that helps groups distinguish between high-value, low-effort quick wins and expensive, low-impact time-sinks. Draw the grid on a flip chart and ask participants to place each action item in the appropriate quadrant. Actions that fall in the top-left (High Impact, Low Effort) are your immediate priorities. Actions in the bottom-right (Low Impact, High Effort) should be deprioritized or dropped entirely.

| | LOW EFFORT | HIGH EFFORT |
|---|---|---|
| **HIGH IMPACT** | **Do First** *(Quick Wins)* | **Plan Carefully** *(Major Projects)* |
| **LOW IMPACT** | **Fill-In Tasks** *(If Time Allows)* | **Avoid or Drop** *(Not Worth It)* |

### 3. The "One Thing" Method

When time is very short or the group is struggling to agree, the **"One Thing" Method** cuts through the noise. Ask the group a single, focused question and wait for the answer. This method is particularly effective when the group has been going in circles or when you sense that trying to prioritize everything will eat up the remaining time. It forces a collective commitment to the highest-leverage action — and from there, you can work outward to the next two or three.

## How to Present Prioritization to the Group Without It Feeling Arbitrary

Participants sometimes resist prioritization because they worry it means their ideas are being dismissed. Frame it explicitly as a capacity decision, not a values decision: *"We're not saying these other ideas aren't important — we're saying we want to focus our energy where it will have the most impact in the time we have."* Make the process transparent. Use one of the structured methods above so the group can see how the priorities were determined. When people participate in the prioritization process, they accept the outcome.

**Facilitator's Prioritization Phrase**

"If we could only do one thing before we meet again, what would have the most impact?"

## Protecting the Top 3

Once you've prioritized, protect the outcome. It is tempting — especially in a high-energy room — to keep adding items back to the active list after prioritization is complete. Resist this. Acknowledge the other ideas (*"These are on the parking lot and we won't lose them"*) and hold the line on the top three to five actions. The facilitator's job at this point is to be a gentle guardian of focus. Fewer, clearer actions change organizations. Long action lists archive quietly in email folders.

SECTION 5

# Action Tracking and Follow-Through

## The Action Item Disappears the Moment You Leave the Room

The Live Action Log on the whiteboard exists in the room. The moment the session ends, people start forgetting what was on it. By the time they get back to their desks — after the walk to the car, the debrief conversation in the hallway, the notifications waiting on their phone — the specifics have already started to blur. This is not a character flaw; it is how human memory works. Your job as facilitator is to bridge that gap with a reliable system that keeps actions visible after the room is empty.

## Choosing a Tracking Method

| Method | Pros | Cons | Best For |
|---|---|---|---|
| **Email thread** | Everyone has it; no new tool required | Gets buried; hard to update; no status visibility | One-off sessions with simple action lists |
| **Shared document** (e.g., Word, Google Doc) | Easy to update; always current; low friction | Requires a discipline to actually open and maintain it | Ongoing teams with recurring reviews |
| **Project management tool** (e.g., Planner, Asana, Trello) | Full status tracking; assignable; integrates with workflows | Requires setup; overkill for small action lists | Complex initiatives with many dependencies |
| **My Workshop Tools™ follow-up** | Purpose-built for workshop outcomes; familiar format for SFTO participants | Requires participants to be in the SFTO ecosystem | SFTO workshop series with ongoing cohorts |

## The Action Summary Email

Send this within 48 hours of the session — ideally within 24. The longer you wait, the more the moment fades. Keep it brief, structured, and scannable. The goal is not a full session recap; it is a clear, confirmed record of what was agreed and who owns it.

**TEMPLATE — Action Summary Email**

**Subject:** *[Workshop Name]* — Action Summary & Next Steps

**To:** *[All workshop participants]*

Hi *[team/everyone/first names]*,

Thanks for a great session on *[date]*. Here's a summary of what we agreed — please review and flag anything that doesn't look right.

ACTION

OWNER

BY WHEN

*[Action description]*

*[Name]*

*[Date]*

*[Action description]*

*[Name]*

*[Date]*

*[Action description]*

*[Name]*

*[Date]*

**Next check-in:** *[Date and time of next review]*

If you have any questions about your action or need to adjust your timeline, please reach out directly rather than waiting for the check-in. Let's make these happen.

*[Your name]*

## The Check-In Cadence

How often you review actions depends on the timeline. Actions due within two weeks warrant a check-in at the one-week mark. Actions due within a month need at least one mid-point check-in. For longer-range actions, monthly reviews are usually sufficient. The check-in doesn't need to be a formal meeting — a quick message asking *"How's the [action] coming along?"* is enough to maintain visibility and social accountability. What matters is that the check-in is scheduled and happens.

## What to Do When Actions Stall

When an action hasn't moved, start with curiosity, not accountability. Ask the owner what got in the way: *"What would help unblock this?"* Stalled actions are usually a sign of one of three things — the action was under-resourced, the owner's capacity changed, or the action was never as clearly defined as it seemed in the room. Address the underlying issue rather than the missed deadline. If the action is genuinely still important, reset the date and re-confirm the owner. If circumstances have changed and it no longer makes sense, retire it explicitly and say so to the group — don't just let it quietly disappear.

## Closing the Loop: Celebrating Completed Actions

When an action is completed, say so — visibly, to the group. This sounds obvious, but it is frequently skipped. Acknowledging completed actions reinforces the value of the process, rewards the owner's follow-through, and signals to the rest of the group that this system actually works. Even a brief *"Before we move on — Marcus completed the onboarding checklist this week. Let's take a second to acknowledge that"* does more for your next action-planning session than any template or technique.

SECTION 6

# Running the Action Planning Segment in a Workshop

## When to Run Action Planning

The instinct is to save action planning for the end of the session — after all the content has been covered and all the discussions have wrapped up. Resist this. By the time you reach the final fifteen minutes of a long workshop, energy is low, people are tired, and the decisions you make in that window are the least considered of the day. Instead, build action planning into the natural close of each major discussion or section. By the time you reach the formal action-planning segment, much of the work is already done — you are consolidating and confirming, not starting from scratch.

If you must have a dedicated action-planning block, place it **before** your closing reflection, not after. That way it happens while the group still has energy and focus, and the closing reflection becomes the final, energizing note that sends people out the door feeling good about the day.

## How Long Action Planning Should Take

For a two-hour session: allow 10–12 minutes. For a half-day session: allow 15–20 minutes. For a full-day session: allow 20–25 minutes, ideally split across the day rather than compressed at the end. These timings assume that some action capture has been happening throughout the session via the Live Action Log. If you are starting from scratch at the end of the day — building the action list from memory — add another 10 minutes and accept that the quality will be lower.

## Facilitating Action Planning Step by Step

- **Surface candidate actions from the discussion.**
  Ask the group: *"Looking at everything we've covered today, what are the things that need to happen as a result of this session?"* Capture responses quickly on the flip chart without editing or evaluating — you want everything on the surface first.
- **Consolidate and clarify.**
  Review the raw list and remove duplicates, combine similar items, and restate any vague candidates in specific, actionable language. Do this with the group visible — read each one aloud as you refine it and confirm that the restatement captures what was intended.
- **Prioritize.**
  Use one of the three methods from Section 4 — dot voting for speed, the Impact vs. Effort Matrix for depth, or the One Thing Method when time is very short. Confirm the top three to five actions with the group before moving on.

- **Assign owners and deadlines.**
  Work through the priority actions one by one. For each, ask: *"Who owns this?"* and *"What's a realistic date?"* Use the ownership phrases from Section 3 to invite rather than draft. Fill in the owner and date columns of the Live Action Log in real time.
- **Record in the Live Action Log.**
  Ensure the completed table is legible and captured — either by photographing the flip chart immediately or by entering it into a shared document before the session ends. Do not leave the room without a clean record of the final action table.
- **Read the actions back to the group for confirmation.**
  Before closing, read each action aloud — the action, the owner, and the date — and ask the room: *"Does this capture what we agreed?"* This final read-back catches errors, confirms consensus, and gives every participant a moment to hear their commitment spoken out loud in front of the group. That spoken commitment matters more than people realize.

## Phrases for Moving Through the Action Planning Segment

**Phrase Bank — Facilitating the Action Planning Segment**

*"Let's take fifteen minutes now to turn everything we've discussed into a concrete plan. I want us to leave here knowing exactly what happens next."*

*"We've got a good list. Let's figure out which of these we're actually going to do, rather than trying to do all of them."*

*"For each action I'm going to ask two questions: who owns it, and by when? That's all we need."*

*"I'm going to read these back at the end, so if something doesn't sound right, stop me."*

*"Before we close — does everyone feel clear on their action and their deadline? Any questions or concerns now are much easier to address than they will be next week."*

## The 5-Minute Action Plan

Sometimes — despite your best planning — the session runs long and you have five minutes, not fifteen, for action planning. Don't skip it. A compressed action plan is infinitely better than none. Use this sequence:

- Ask: *"What is the single most important thing that needs to happen as a result of today?"* (1 minute)
- Assign an owner and a date for that one action. (1 minute)
- Ask: *"What are the next two most important things?"* Capture quickly. (2 minutes)
- Read all three back. Confirm. (1 minute)

Three named actions with owners and deadlines is a real outcome. Twenty vague ones are not. Use the time you have and commit to sending the full action summary email within 24 hours to capture anything that didn't make it into the room.

## Workshop Action Planning Worksheet

*Complete during or immediately after the session. Distribute to all participants within 48 hours.*

**Workshop Name:** **Date:** **Facilitator:**

**Participants:**

## Section 1 — Priority Actions

| # | ACTION | OWNER | BY WHEN | DEFINITION OF DONE | STATUS |
|---|---|---|---|---|---|
| 1 | | | | | |
| 2 | | | | | |
| 3 | | | | | |
| 4 | | | | | |
| 5 | | | | | |
| 6 | | | | | |

## Section 2 — Decisions Made

*Record key decisions reached during the session (not actions — decisions).*

1.

2.

3.

## Section 3 — Parking Lot / Deferred Items

*Items raised but not actioned today — to be revisited at a future session.*

1.

2.

3.

## Section 4 — Next Review Date

**Review Date & Time:** **Format (in-person / virtual):** **Organized by:**

**Distribute to all participants within 48 hours.**

# Key Takeaways

- **Treat action planning as a core facilitation responsibility,** not an optional add-on that gets compressed when time runs short.
- **Capture decisions and actions in real time** using a visible Live Action Log so the whole room shares ownership of what's been agreed.
- **Distinguish clearly between a decision and an action** — a decision records what was agreed; an action records who will do what by when.
- **Apply the Single-Owner Rule** without exception: every action has exactly one named human being accountable for its completion.
- **Use the "Before We Move On" technique** to crystallize actions before each discussion closes, so nothing is left floating when you transition to the next topic.
- **Prioritize ruthlessly** — a focused list of three to five real actions will always outperform a sprawling list of twenty notional ones.
- **Invite ownership using open questions** rather than assigning tasks — a willing owner delivers; a reluctant one doesn't.
- **Send the action summary email within 48 hours** of the session, using a structured format that makes owners, actions, and deadlines immediately visible.
- **Schedule follow-up check-ins before you leave the room** — accountability without a review date is just optimism.
- **Celebrate completed actions visibly** to reinforce that the system works and to build the group's trust in the action-planning process over time.

# Quick Reference

## Action Planning

### The Live Action Log

Keep this visible to the whole room throughout the session. Update in real time.

| ACTION | OWNER | BY WHEN |
|---|---|---|

### Ownership Phrases

Use these to invite ownership — never draft or assign without consent.

*"Who would feel comfortable taking the lead on this one?"*

*"This seems to sit in your area — would you be willing to own it?"*

*"Is there someone already thinking about this outside of this room?"*

*"Who wants to be the person we come back to on this at the next check-in?"*

### Prioritization in 3 Minutes Dot Voting — 5 Steps:

List all candidate actions on a flip chart.

Give each participant 3 dots.

Everyone votes simultaneously — no discussion.

Count the dots.

Highest = highest priority.

Confirm with the group: *"Does this feel right?"  "If we could only do one thing before we meet again, what would have the most impact?"*

## Action Summary Email Structure

Send within 48 hours. Five elements, in order:

**Subject line:** [Workshop Name] — Action Summary & Next Steps

**Opening line:** Brief thanks + prompt to review and flag errors

**Summary table:** ACTION | OWNER | BY WHEN

**Next check-in date:** Stated explicitly

**Closing line:** Encouragement to reach out before the check-in if anything needs adjusting

***A workshop that ends with clear owners and real deadlines is a workshop that changes something.***