# **Action summary**

An action summary will allow you to prioritise your advisory boards suggested next steps. Make the actions time-bound, for example to be completed before the next meeting, and delegate each action to the relevant advisory board member. Bear in mind that your advisory board members are there to advise you only. They are not there to instruct you or make decisions on your behalf or your organisation’s behalf. You may find that an action summary is more useful than a work plan or vice versa. You may also decide that you don’t need either – it will depend on the context your advisory board exists in and what you need them to help you with.

The example below is an action summary that might be useful for an advisory board with a customer growth focus. It can be easily modified to suit other advisory board situations such as one that has been established for a major project by a formal company board.

**Example**

Make these actions as transparent as possible so responsible advisory board members know exactly what they are tasked with and the remaining members know what to expect

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Date of summary  DD.MM.YY | | | | |
| Date Assigned | Responsible | Actions | Due Date | Comments |
| DD.MM.YY | Bob  (marketing) | Provide recommendations on which media to use to reach the target market in Australia, and suggest state by state priorities for the roll-out. | DD.MM.YY  Make each action realistically time-bound to help keep advisory board meetings/sessions on track |  |
| DD.MM.YY | Keith  (logistics) | Provide options for building up inventory for the Australian launch, including just-in-time deliveries and airfreighting, and considering the impact on cash flow. | DD.MM.YY |  |
| DD.MM.YY | Raoul  (production) | Make recommendations about the merits of subcontracting the manufacture of sub-components, taking into consideration cost and quality implications. | DD.MM.YY |  |

Source: Adapted from a CCH template