JUPITER PRIME
Consulting • Training • Advisory
جوبيتر برايم للاستشارات والتدريب

COURSE BROCHURE

# Action Tracking and Follow-Up Skills for Coordinators Training Course

27 June – 1 July 2027
Online

# Action Tracking and Follow-Up Skills for Coordinators Training Course

**Ref:** 2054_75669 **Date:** 27 June – 1 July 2027 **Location:** Online **Fees:** 1900 GBP

Action Tracking and Follow-Up Skills for Coordinators is a 1-week training course for coordinators, executive assistants and office managers who capture meeting actions and see them through, and it produces a Follow-Up Tracker and Reminder Calendar ready for daily use. Across hybrid teams and chat channels, meeting promises slip unless someone owns the loop. Jupiter Prime Training offers this course in action tracking and follow-up skills for coordinators.

## Why Action Tracking and Follow-Up Skills for Coordinators Matters Now

Two forces raise the stakes. Collaboration tools have multiplied the places where a request can be made, so actions scatter across email, chat and minutes. At the same time, senior leaders lean on coordinators and assistants to tell them, at any moment, what is open, late or done. Offices that track well close tasks on time; those that track poorly lose actions and strain goodwill. The course draws on the SMART criteria Specific, Measurable, Achievable, Relevant, Time-bound for writing actions, the RAG Red, Amber, Green status convention and the Eisenhower Matrix for prioritising follow-up.

## Who Gains Most from Action Tracking and Follow-Up Skills for Coordinators

- Staff who take minutes and record actions in leadership meetings
- Assistants who manage a senior leader's open requests and deadlines
- Office leads who keep shared trackers and status lists current
- Coordinators who chase inputs from colleagues they do not supervise

An executive support team whose assistants and coordinators attend together gains most.

## Action Tracking and Follow-Up Skills for Coordinators Capabilities

Participants turn loose promises into owned, dated actions kept moving by well-timed reminders.

- Write meeting actions with an owner, date and done-state — the chair approving the minutes
- Build an action log sorted by status and age — the leader asking what is late
- Design a follow-up cadence matched to task urgency — colleagues who receive reminders
- Communicate a reminder that is firm yet courteous — relationships with peers and seniors
- Apply a simple raise-the-flag rule for stalled actions — the manager who must step in
- Specify a one-page status note using RAG ratings — senior readers short of time

## Key Action Tracking and Follow-Up Skills for Coordinators Terms

- Action log — A running list of agreed tasks, each with an owner, due date and status.
- Done-state — A short statement of what finished looks like, so owner and coordinator agree when an action is closed.
- Follow-up cadence — The planned rhythm of check-ins and reminders for an action, set by its urgency and size.
- RAG status — A Red, Amber or Green rating that shows at a glance whether an action is on track.
- Action ageing — The number of days an item has stayed open, used to spot tasks drifting out of sight.
- Closing the loop — Confirming completion to the requester, then marking the action closed.

## Action Tracking and Follow-Up Skills for Coordinators Day by Day

### Day 1: Where Actions Get Lost

- Request Source Audit — Listing Every Channel Where Tasks Are Assigned
- Lost-Action Post-Mortem — Tracing Why a Past Commitment Slipped
- Coordinator Role Charter — Agreeing What the Coordinator Owns and Does Not
- Stakeholder Expectation Map — Clarifying What Each Leader Wants Reported
- Personal Capture Habit Check — Choosing One Inbox for Every New Action

### Day 2: Capturing Actions in Meetings

- SMART Action Wording — Turning Discussion Points Into Owned, Dated Tasks
- Done-State Statements — Agreeing When an Action Counts as Finished
- Live Minute-Taking Template — Recording Decisions and Actions Separately
- Read-Back at Meeting Close — Confirming Owners Before People Leave
- Minutes Circulation Routine — Sending Actions Within an Agreed Time

### Day 3: Building the Action Log

- Action Log Column Design — Selecting Fields for Owner, Status and Age
- Shared Spreadsheet or Task App — Weighing Access, Visibility and Upkeep
- Eisenhower Matrix Sorting — Ranking Open Actions by Urgency and Importance
- Action Ageing Filters — Surfacing Items Open Longer Than Agreed
- Duplicate and Orphan Clean-Up — Merging Repeats and Assigning Ownerless Tasks

### Day 4: Chasing Without Friction

- Follow-Up Cadence Rules — Setting Reminder Timing by Task Size
- Courteous Reminder Scripts — Wording Nudges for Peers and Seniors
- Channel Choice for Reminders — Choosing Email, Chat, Call or Visit
- Raise-the-Flag Criteria — Deciding When a Stalled Action Goes to a Manager
- RAG Status Note — Reporting Open, Late and Closed Actions on One Page

## Day 5: Practising the Follow-Up Tracker and Reminder Calendar

- Mock Meeting Capture — Applying Day 2 Wording to a Live Discussion
- Log Population Drill — Applying Day 3 Fields to Captured Actions
- Reminder Role-Play — Applying Day 4 Scripts to a Reluctant Owner
- Loop Closure Checklist — Confirming Completion Back to Each Requester
- Tracker and Calendar Assembly — Combining Log, Cadence and Status Note Into One Set

## Applying Action Tracking and Follow-Up Skills for Coordinators After the Course

- Introduce read-back at the close of one recurring meeting and circulate SMART actions within a day.
- Set up an action log with ageing filters and send a weekly RAG status note to one senior leader.

## Action Tracking and Follow-Up Skills for Coordinators Questions FAQ

### What are action tracking and follow-up skills for coordinators, and why do they matter now?

They are habits of capturing, logging and chasing agreed tasks to completion. They matter now because requests arrive through many channels, and in sectors such as banking and hospitals a missed action can delay decisions for weeks.

### Which roles gain most from action tracking and follow-up skills for coordinators?

Coordinators, executive assistants and office managers gain most.

### How does action tracking and follow-up skills for coordinators training differ from a time management course?

It centres on other people's commitments rather than your own schedule. You learn to capture, log and chase actions owned by colleagues, while time management covers organising your personal tasks and priorities.

### What do you bring back from action tracking and follow-up skills for coordinators training?

You bring back a ready tracking set: an action log with ageing fields, reminder scripts and a one-page status note template.

## Action Tracking and Follow-Up Skills for Coordinators: The Way Forward

The Follow-Up Tracker and Reminder Calendar first informs which open actions need a nudge this week. Coordinators and assistants run it daily, and senior leaders read its weekly status note. After its first month in use, revisit reminder timing and raise-the-flag criteria, which often start too gentle for urgent tasks.