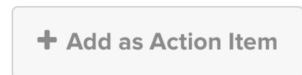


How to Add an Action Item...

Action Items help to organize development efforts and allow for setting automated email reminders, assuring that development efforts remain visible and timely.

In addition to simply “listing” Action Items, Team Dashboard encourages journaling about progress, include notations about why an item is important, and ultimately complete the item. An Action Item can even be “un-completed” if future changes warrant. There is no limited to the number of Action Items that can be added.

Action Items can be created from Team Dashboard content within **Relationship Insights** or **Development Insights** sections using the **+Add as Action Item** button.



A **Custom Action Item** can be created via the **+Add Item** link from the **Home** page and completing the pop-up form.

These can be anything people wish to bring attention to, track, or set email reminders for, such as a book to read, a YouTube video to view, or an on-the-job assignment to complete.

Add Item ×

To add an action item to your list you can:

- Select an item from your personalized library of **Development Insights**
- Select a **Relationship Insight** to help you work more effectively with a specific team member, or
- Create a **custom action item** using the form below.

Title
Enter a custom title

Source URL
Enter the URL of the source content, if any.

Personal Notes
Make this item personal and actionable (e describe why it is relevant to you, what action you expect to take, etc)

Email Reminder Frequency
How often would you like to be reminded of this Action Item? Reminders are sent to your email inbox.

Bi-Weekly ⌵

Cancel Save