



Minute Taking Tips

Session starts at 2pm



HELLO!

I am **Karen Maher**

I am an experienced HR consultant and workforce development specialist originally from the North East of England.

I specialise in coaching, mentoring, mediation and training delivery. I deliver QQI accredited courses including People Management, Supervisory Management and Medical Secretaries

I am also qualified to administer and deliver psychometric tests including EQi2 (Emotional Intelligence) and MBTI (Personality Types).



Overview

- The role and responsibilities of the minute-taker
- Creating minutes that are clear and concise
- Accurate recording of salient points of a meeting
- Listening more effectively
- Taking shorter notes
- Structuring the minutes with a clear core message and layout
- Note taking techniques
- Summarising skills
- Sharing and filing minutes



A meeting is an event where minutes are taken and hours wasted.

James T. Kirk, Captain of the Starship Enterprise

Why bother?

Minutes are the **official record** of what passed at a formal meeting.

Each item (or 'minute') is a short note intended to remind readers of a decision that was reached, and the actions that should be taken as a consequence.

The key purpose of all minutes is to provide a **public 'memory'** for an organisation or group.



Why bother?

The goal - to provide an **accurate summary** of the key points.

The purpose - minutes track **accountability** and they are a **legal** record of what took place

Taking Minutes

The key skill that a minute-taker needs is the ability to record the message, not the words.

Minutes are **not** a record of what was said.

They are a **record of what was discussed**



Your role

The minute-taker must produce concise, easy-to-understand minutes to properly support organisational or departmental decision-making.

You are responsible for documenting an official record of what was accomplished and decided during a meeting.

You demonstrate your communication ability by taking and writing concise, coherent Minutes.

You focus on what is important. You develop a better understanding of your team and your organisation.

5 Step Approach

1. Pre-Planning
2. Record taking - at the meeting
3. Minutes writing
4. Editing and distributing minutes
5. Filing or storage of minutes for future reference



Preplanning – do your homework

- Understand the purpose of the meeting
- Understand the agenda
- Review related documents
- Review minutes from previous meetings
- Know who will attend
- Agree the depth of coverage in advance



Preplanning

Talk with the Chair

- Agree level of detail
- Agree standing items
- Agree format
- Agree timelines and turnaround times for draft and finalised minutes



Preplanning – tools to use

Choose your recording tool

- pen and paper
- laptop
- audio/video

Prepare an outline



Preplanning – which is best and why?

Tool	Pros	Cons
Pen and Paper		
Laptop		
Audio/Video		

Preplanning

- Copy of agenda
This can be used to form a template for your notes/minutes
- Compile a list of those attending and any guest speakers
- Have copies of required documents



Preplanning - Templates

Templates can provide you with some guidance as to how to structure your minutes and the required content

Minutes from previous meeting may help you to devise your own template or your company may have their own preferred style

Sometimes a blank sheet of paper may suffice and you can prepare an outline in advance

There are lots of templates available on line should you wish to find one to customise



minutes

Meeting Title			
Date		Meeting Time	Meeting Location
Meeting called by	Name		
Type of meeting	Type of meeting		
Facilitator	Facilitator name		
Note taker	Note taker name		
Timekeeper	Timekeeper name		
Attendees	Attendees		
Agenda Topic 1			
Time allotted	Presenter		
Discussion	Enter discussion		
Conclusions	Enter conclusions		
Action Items	Person Responsible	Deadline	
Action item 1	Presenter Name	Date time	
Action item 2	Presenter Name	Date time	
Agenda Topic 2			
Time allotted	Presenter		
Discussion	Enter discussion		
Conclusions	Enter conclusions		
Action Items	Person Responsible	Deadline	
Action item 1	Presenter Name	Date time	
Action item 2	Presenter Name	Date time	
Agenda Topic 3			
Time allotted	Presenter		
Discussion	Enter discussion		
Conclusions	Enter conclusions		
Action Items	Person Responsible	Deadline	
Action item 1	Presenter Name	Date time	
Action item 2	Presenter Name	Date time	

Company
Logo Here

Meeting Minutes

[Date]	[Time]	[Location]
Meeting Called BY:		
Type of Meeting		
Name of Meeting Facilitator		
Time Keeper		
List of Attendees		

[Time Allocated]	[Topic]	[Presenter]
Summary of Discussion		
Conclusions		
Action Items	Person Responsible	Deadline

[Time Allocated]	[Topic]	[Presenter]
Summary of Discussion		
Conclusions		
Action Items	Person Responsible	Deadline

Observers	
Resource Persons	
Notes	

Preplanning

Taking Notes before the Meeting

Before you get started, identify the objective of the meeting. Establish what the meeting is about and the desired outcome.

- Date and time of the meeting
- Purpose of the meeting
- Who is involved in this discussion
- What should be accomplished
- Any questions that need to be answered
- Action items and next steps
- Deadlines and milestones



Record Taking - At the meeting

- Arrive at the meeting with plenty of time to set up properly.
- At the meeting sit where you can see and hear proceedings clearly.
- Check actions, outcomes and responsibilities if not clear.
- After the meeting clear up any questions as quickly as possible.
- Immediately (and briefly) after the meeting clarify any new names and terms.



Record Taking - At the meeting

Don't write **everything** down

Consider dividing your notes into the following sections to boost efficiency-

- Issues
- Decisions
- Action items
- Questions



Try to keep sentences short, writing down only keywords, decisions, and assignments.

Record Taking - At the meeting

Focus on what comes **next**

Write down all actionable items, decisions, and recommendations—and sum them up in your own words to reinforce your understanding of what's supposed to happen next.

Record items **as they come up**, rather than after the meeting when time starts to mess with your memory. This will ensure that you capture the most accurate information.



Record Taking at the Meeting

1. What was decided?
2. Why was the decision taken?
3. Who is going to carry out the action points related to the decision?
4. When must the action points be completed (what is the deadline)?
5. How was the decision reached and how will it be implemented?



Minute Writing – After the Meeting

Write up your notes while the meeting itself is still fresh in your mind.

The template used should make it easy to locate important information, and it should be consistent across a series of meetings.

Terminology should be consistent.



Write in a concise, accurate manner, taking care not to include any sort of subjective opinion.

Actions and outcomes should be clear – by who and by when.

Minute Writing

Style

Minutes should be written in the **past tense**. As they are a record of a discussion that has taken place, they always refer to an event in the past.

For example-

‘It was noted that ‘

‘The Chair reported’

‘The Committee agreed that it would’

‘Members noted that’



Minute Writing

Style

Minutes represent the views of the group as a whole, rather than the recollections and opinions of the writer, or the statements of individual members.

Minutes should indicate neutrality and objectivity. To do this, **write in the third person.**

For example-

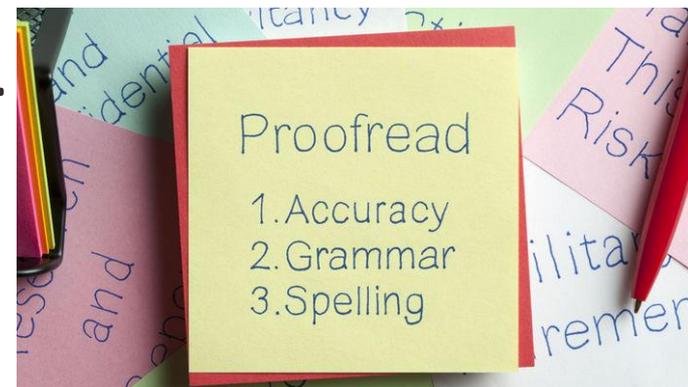
‘It was noted that work on targets was progressing well.’

‘It was anticipated that this would streamline the process.’



Editing and distribution

- Proofread and edit the minutes
- Ensure the Chair approves the minutes
- Circulate - a delay in circulating meeting minutes usually means a delay in taking action. Ensure correct distribution of full minutes and reserved minutes



Filing and Storage

Once your meeting minutes are fully written, you are responsible for making them official.



Follow your organisation's procedures and protocols for storing minutes.

It's a good idea to have back-up copies either in print or on a hard drive.



Important skills

- Listening
- Assertiveness
- Timekeeping
- Written English
- Critical thinking
- Confidentiality



Any others you would add?

Listening



Your hear -

“There has been a marked increase in the number of cars in the car park. The car park is now too small. If the car park is full there is nowhere else to park as there are yellow lines outside the store. We are losing customers because of this.”

You write –

“The size of the car park needs addressing because we are losing customers.”

Assertiveness

Minute takers must have confidence to be able to speak up in a meeting (where appropriate) and clarify points.



Written English

Without a doubt not only is it a skill to take minutes at the meeting, but the real work comes in being able to write a draft set of notes into an exceptionally good piece of writing.

This means being able to produce a document that is **spelt correctly and uses correct grammar and punctuation.**



Summary

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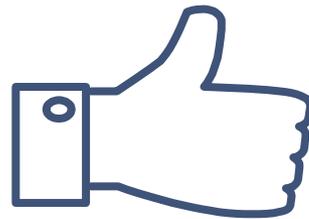
Summary & Recap

Q&A



**GOOD BYE &
GOOD LUCK!**





THANKS!

Any questions?
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