Minute-taking: What's the best way to approach it?

Question: "Do you have any suggestions on how to take good minutes at a meeting?" — *Shawndelle Kurka*

Comments

Two most important items are the names of the speakers and the key point they are making. You can always call them later for clarification if you need it.

Posted by: | June 20, 2008 at 01:31 PM

I use a laptop with some great software called Mindmapper. It allows you to use their format to list topics and subtopics and details to each and then will convert it into a Word document for you. I have improved my speed and now I can get the minutes out before the close of the day. Mindmapper has a website - just Google it and check it out!

Posted by: gamehen | June 20, 2008 at 01:38 PM

I find a good agenda is key and Keep to the agenda. Ask for all materials/presentations before the meeting, you can refer back to them for details.

Posted by: Valorie | June 20, 2008 at 01:41 PM

Minute-taking is probably the hardest thing that you do as an admin, until you develop your own style.

Depending on the type of meeting, be it formal or informal, I usually ask the meeting leader what they expect to see in the minutes.

For example, rather than giving a play-by-play of all the discussions that went on, you can take the agenda and capture action items following each agenda item.

You would note what the action is, who is responsible for it, and a deadline for the result (this is usually the next meeting date). Sometimes it takes a few meetings before everyone is happy with the outcome, but make sure you work with the team.

I am responsible for the minutes at two weekly one-hour meetings for our project management office, and each

one is done differently. One is done on a per-project basis and the other one lists discussion items that are sometimes closed off in the very same meeting.

Once you develop an understanding with the team involved, it can be fun. Just don't stress over it without involving the team.

Rhonda Scharf is a seminar leader and puts on a seminar for minute-taking. Here is her contact information taken from a recent email: "Send an email to Rhonda@on-the-right-track.com or call direct at 1-877-213-8608 to speak to Rhonda directly.

Hope this helps.

Posted by: Patty | June 20, 2008 at 01:42 PM

I would agree with the recommendations here so far. Also, it might be helpful to use a voice/tape recorder for some of your meeting until you are in the groove of taking minutes. It comes natural to you after you find your groove, but until then, it might be nice to record the meeting and be able to refer back to it while documenting the minutes.

Posted by: CC | June 20, 2008 at 01:47 PM

I HATE taking minutes. What do I write down? How do I know what is important? I used to ask myself. Now, I try to think about those things during the meeting. In my experience, you do not have to write things down word-for-word. The main thing is to get down the gist of each conversation, the pros and cons, the disenting viewpoints and most importantly to end every section with an "action log": What was the decision made? Who is responsible? By when? Any other follow-up steps?

I now also use bullet points in each meeting section and people find it more readable. In the example below it might have taken half hour to come up with the first bullet point, but none of that discussion needs to be chronicled.

Company Picnic
* Date picked: June 15
* Discussion around to hold at Mercer County park again. It is convenient but some felt it was too crowded.
* Food will be handled by the committee again - J.T. volunteered to chair.
Action: L.K. will look into other venues and book the park again if nothing else is available; she will let us know at next meeting.

Posted by: Lisa | June 20, 2008 at 01:47 PM

The one thing most people do not realize its that meeting minutes are a legal record. I take minutes for our Executive Board, all major committees and several sub-committees. I use the agenda as a reporting guide, with copies of all handouts noted in the minutes and for details I may need. Also, except for special circumstances, I do not use names. Instead, I use "it was decided" "such-and-such group will follow-up". Bullet points of major discussion is usually all that is needed.

Posted by: Gail Paschall | June 20, 2008 at 01:49 PM

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Posted by: Lisa | June 20, 2008 at 01:49 PM

In addition to other tips above, I suggest looking at minutes from prior meetings at your company to get an idea of how they're written/formatted.

Posted by: | June 20, 2008 at 02:05 PM

I have been taking minutes at several different meetings for several months. I started with writing notes at first but it was very difficult to catch all the key points and get them down on paper. Now I take notes on a lap top. I find I can type the key points faster than I can write them. I do not stop to correct mistakes or format until I get ready to prepare the actual minutes after the meeting. I have also found by typing the minutes I save a lot of time because I only need to edit not type them from scratch.

Posted by: MM | June 20, 2008 at 02:12 PM

I agree with all of the above and want to reiterate the fact the minutes you take are a legal document and become a permanent record of the company you work for.
I have taken hundreds of meeting minutes, whether it was for certain departments, committees, Board of Trustees, etc. I always use an Agenda and tape record the meetings. I type the minutes as soon after the meeting as possible to ensure I will not forget what I wrote. I recently took a refresher class for my shorthand skills. Taking the notes in shorthand is a huge timesaver and I catch more of what is being said. Most importantly.....you need to pay attention at what is being said at the meeting you are taking notes for....it's hard at times when the discussion seems to go on and on, however, it's important you keep tabs on what is being said so you don't miss any pertinent information.

Posted by: | June 20, 2008 at 02:13 PM

I agree about a good agenda is the key to easier meeting minutes. I gather what the meeting agenda is and I also then create it and then organize the handouts for everyone. That way I just make notes in addition to the

agenda bullets. It is really easier and less writing. Then the agenda is also attached to the meeting minutes, a clean copy of course and kept in a binder.

Posted by: | June 20, 2008 at 02:35 PM

I use a voice recorder and I also take shorthand notes during the meeting. I also make sure I have a copy of all handouts and agenda to refer back when I am typing the minutes up for the next meeting. I normally have the names of the people who attended and their agency/company, approval of the Old minutes, old business updates and new business items. I normally will not put the names of the persons who made a motion or seconded it. I will make it in general terms. I think the biggest thing is making sure you are understanding what is being said and how its being said in the course of the meeting.

Posted by: Jo | June 20, 2008 at 04:17 PM

All of these suggestions are good ones. Unfortunately, every entity records minutes in their own way so there is no "one size fits all". Just take the time to research how they like things recorded and go from there. I format my minutes based on the agenda items. The general information provided is a little summary of the agenda item and discussion and then any motions, directives or important comments made. I also take detailed notes on paper if I feel like something might need more added to it later and we record all meetings just for backup. One very helpful hint is to enter autowords, phrases, names, etc. that you use all the time in your minutes into the computer so that they auto fill as you type; it saves a lot of time.(example: "motion made by", "Motion carried with no objections", "expressed a concern about", etc.).

Posted by: Helen | June 20, 2008 at 08:52 PM

I tend to write almost everything I hear during the meeting (using my own "short write" code to quicken, leaving out verbs) then I type them up immediately - I put the writing time on my calendar along with the meeting. I get another attendee to review to see if I've missed something -- and I too use the bullet method.

Posted by: MK | June 21, 2008 at 11:17 AM

Practice and figuring out your best way to understand your notes is pretty much the only way to 'master' note taking.

In high school i did this a lot and i always had to recap my notes at the end of the 'meeting' to make sure everyone agreed on what was covered. You could think of that when you take notes to give you a clue as to whether or not you are covering everything.

Posted by: Liza | June 23, 2008 at 02:26 PM

I am one of the "dinosaurs" left that takes notes using shorthand. When I am asked to record minutes, I ask the Chair if there are specific things I should listen for, actions items, etc. and if possible, I sit near the Chair. The first thing I do is jot down the names (initials if I'm familiar with the attendees) of those present. Sometimes, I draw a diagram of the table and note who sits where for those that I don't know. I'm not shy about asking for

the participants to identify themselves and if it is an informal setting, I ask for clarification of a point. If they have asked me to take minutes of their meeting, I assume they want accurate, complete minutes so I ask questions but I don't make a pest of myself in doing it! I try to transcribe the notes as soon after the meeting as possible and generally have the chair review them.

I don't like using a recorder because (1) it might make me lazy in taking shorthand notes and (2) it also picks up, in addition to voices, chairs squeaking, coughing, ice in glasses, throat clearing, papers rattling, etc. Unless it is a high-tech recorder that picks up voices no matter where the speaker is sitting, only those sitting near the recorder can be heard clearly.

I also believe that taking good notes is a matter of experience, good listening skills, confidence and instinct. Having done this task for many years (from Bank Board Meetings to client meetings to team meetings), I have learned to trust my instincts to know what's important.

Posted by: Pat | June 25, 2008 at 01:22 PM

Before the meeting starts, I ask the "leader" what type of minutes they want, i.e., in-depth, word-for-word, or the "gist" of the matter. Most managers agree that the gist method captures enough information to remind attendees what was discussed without revealing their communication foibles.

Posted by: Linda Cameron | June 25, 2008 at 02:21 PM

One of you stated you recently took a shorthand refresher course. Can you please tell me where you found the course? I have been looking in my area and have been unable to find a shorthand refresher course.

Also, I recently attended Rhonda Scharf's seminar, Minute Taking Made Easy. It was wonderful. I would highly recommend it.

Posted by: Cheryl Weinert | June 27, 2008 at 01:53 PM

If you record the meeting that is to be stored with the minutes, it because part of the legal document. Another piece of information --- any notes you take become part of the minutes and should be saved also. This really makes you think about what to do to capture the initial notes for your Minutes.

Posted by: Sandyb | June 27, 2008 at 02:45 PM

I have used Microsoft OneNote to take meeting minutes. It enables you to record the meeting as you type your draft. If you need clarity, you can go back to that specific line to review what was said. You can also tag items for follow up in MS Outlook. The document can be converted to MS Word. This seems to be a best kept secret among note takers in the offices and the classroom. There are a host of other features that will also make your admin life much easier. You can find details of this software at the Microsoft online website. Enjoy!

Posted by: Wendy | June 30, 2008 at 12:22 PM