

9 virtual minute taking tips you need to learn now



Working remotely requires a new set of skills in many areas of your life and career. While meetings are often a staple for businesses, maintaining the effectiveness and efficiency of meetings while operating from a remote location can take some getting used to.

While the first thoughts might be related to how to communicate effectively during meetings and ensure participation, you also want to consider how to improve minute taking.

Virtual minute taking will be a new skill for many, and there are some best practices to make this process more streamlined and impactful.

Here are 9 tips you need to learn to improve the process of taking minutes remotely.

Know who's attending

Knowing who is attending the meeting in advance can help you to prepare your meeting minute template.

Based on the knowledge of who is attending, create a list on your template and check them off as they arrive. If the meeting is held using video technology, you can view the screens to see who is present. However, if the meeting is held over the phone, members can introduce themselves before the session gets started.

Also, be sure to keep track of those who might leave the meeting early or arrive late, as that should be documented as well. While technology can add a barrier in this area for phone meetings, if all cameras are turned on during video meetings, you should be able to track this easier.

Set expectations for the meeting

Just as there are expectations for meetings held in person, there should be a set of expectations in place for virtual meetings. Agreeing on specific rules to make your virtual minute-taking process easier is crucial to your success. Consider points such as:

- Place one person in charge of whose turn it is to ask questions and make comments, so there's an order in communication. This is often the chairperson.
- During telephone meetings, ask everyone to state their name before speaking so you can document who is making the statements.
- Place one person in charge of summarizing the most important points related to each topic of the discussion before moving on to the next section. This is often the chairperson as well.

Review applicable documents

If you don't prepare the papers and agenda, get a copy of them in advance of the meeting.

With this information in mind, you can better anticipate the topics discussed during the meeting, so you're better prepared.

Also, review the prior meeting's minutes - whether you wrote them or not - to refresh yourself on what was recently discussed and what might be addressed during the upcoming meeting.

Use a template

There's no need to start from scratch with your virtual meeting minutes each time. Instead, [create a template](#). Doing so allows you to focus on the core of what's being said and spend less time formatting your notes.

You can use the agenda to create an outline for the meeting minutes.

Typically, your meeting minutes will include

- Date and time of the meeting
- Meeting start and end times
- Name of attendees
- Name of those who couldn't attend
- Acceptance or corrections to previous meeting minutes
- Important dates/due dates
- Actions or tasks
- The main points
- Decisions made on agenda items
- Future choices that should be discussed
- Next meeting date and time

Arrive early

Arriving at an in-person meeting early when taking notes is helpful, so doing so for virtual meetings can be even more so.

When you arrive, ensure you have the tools needed to take notes. It's also good practice to have a backup tool available in case your original system stops working.

You might even choose to have a recording device on hand that you can use to refer back to if necessary. Keep in mind that this should be cleared by the chairperson beforehand, and all attendees should be told when they are being recorded.

Ask questions if necessary

When you're taking minutes, you should stop and ask questions for clarification if necessary. This might include asking someone to repeat themselves or to speak louder. Don't let the meeting continue if you don't understand or can't hear what's being said. In doing so, you could miss adding essential information to the notes.

Have a focus

It's not necessary to write down everything stated during the meeting. Based on your preparation for the meeting, you should know the essential points that will be discussed and base your notes on these topics. You want to know when to spend time listening and when to take minutes because if you spend all your time writing, you could miss out on valuable points.

Document responsibilities

Even more so than usual, when working remotely, you want clarification on who is responsible for completing what tasks.

That's why you want to be sure to note who is responsible for taking the next steps related to projects and action items discussed during the meeting.

The meeting minutes will be shared with attendees, and those who couldn't attend, so it will serve as an official record of what should be done next.

Communicate with the chairperson

You want to be sure to communicate with the chairperson in advance of the meeting and direct questions to him or her during the meeting if necessary.

The chairperson is in charge of the meeting and serves as your go-to contact for getting vital information about the meeting and ensuring your minutes are accurately capturing the agenda items.

You should also run the minutes by the chairperson after the meeting for their review.

Before minutes are distributed to attendees, they should be approved by the chairperson.

Implement to improve your remote minute taking

While taking meetings virtual might come with its challenges, you can make virtual minute taking as streamlined and helpful as they are for in-person meetings.

Following the points listed above, incorporating your knowledge of meeting minutes from before remote work because the new standard and practicing your process with each meeting will help you take minutes better.