

TIPS FOR MINUTE TAKING



I have learnt a lot during my time of taking minutes, my journey into this field started with me achieving my Certificate in Offshore Company and Trust Administration and one of the tutorials in that course was on minute taking and one of the fundamental rules I learnt for minutes was to stick to the facts, i.e. what is agreed and actions required. You will know if you have ever been in a meeting that there are a lot of conversations that go off topic.

But let me take you through the process step by step, from preparation to the finished article.

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Preparation is Key

Before you head into that Meeting with your note pad, there are a few things you need to do first.

You need to read the previous minutes of the last meeting held. You need to be aware of the contents of these minutes as there could be action points that will be raised from those previous minutes at the Meeting you are about to attend. I like to use a highlighter pen here for ease of reference to the action points, especially if the previous set of minutes are long.

You will need the agenda for the Meeting, this will help you to know the subjects to be discussed and also the order in which the discussions are going to take place.

You will also need to know the names of the people who are attending and also those who should be attending but are unable to attend, for the apologies. Also if this is a regular meeting and there are guests attending, you will need to distinguish between guests and regular attendees.

If you don't know the people (you are unable to put a face to the name) attending another little tip I use here, is I look them up on the internet, here LinkedIn is a very good tool to use. I download their profile picture and compile a list, that way as people arrive at the Meeting I don't need to ask their name I know it, I have found this has always gone down well with my clients, they are impressed that I have done my homework.

Finally, I use an A4 note pad for ease of writing and also take into two pens, just in case. Also for some of my meetings I will use a recording device, but always check with who is chairing the meeting that it is ok for you to record the Meeting beforehand.

The Meeting

I will always try to be first into the Meeting, getting there about 10 minutes before it is due to start, this helps you to get set up with your note pad and papers (agenda and previous minutes).

As people arrive and take their seats I draw a map of the table and put the initials of those in attendance in the place they sit on my map to assist when it comes to knowing who is talking, its important you note who is saying what for the minutes. Also try to sit next to the Chairperson of the Meeting, this will assist you and the chairperson for clarification on points.

When the Meeting starts, it's time for full concentration, the key here is not to be afraid to speak up if you are not sure what has been said, but at the same time you don't want to be asking every five minutes, so concentration is key. If the Meeting is moving at a fast pace, you can make a side note to ask the chairperson for clarification at the end of the Meeting.

There are always important key facts to note in any meeting, and these are:

- 1) The title of the meeting;
- 2) where the meeting is being held;
- 3) the date and time of the meeting;
- 4) those in attendance;
- 5) who the chairperson is;
- 6) any guests invited to the meeting;
- 7) those who were invited but not attended (apologies);
- 8) if there was a previous meeting, the minutes of the last meeting should be approved;
- 9) action points from the previous meeting;
- 10) the agenda items.

With all this information the only thing left to input is the discussions had.

A good skill to learn for writing your notes during the meeting is speed writing or shorthand, I can't do shorthand, but do a little speed writing, which basically means using text speech, i.e. instead of "you are" use "u r".

When you are noting what someone is saying in the Meeting write the initials of the person speaking and write the key words of what they are saying.

There should be a natural flow to the Meeting, which is:

- 1) Note of the Apologies
- 2) Approval of last minutes
- 3) Matters arising from the previous minutes
- 4) The items for discussion from the Agenda
- 5) Then any other business

Production of the Minutes

My first tip here would be to type up your notes as soon as you can, especially if you have not used a recording device. The fresher everything is in your memory the easier it will be to type up the minutes.

The format of your minutes should be consistent and ideally you should be working from a template. Using a template will also assist you in not forgetting the important details that need to be included in your minutes.

When noting the attendees of the Meeting in your minutes, the Chairperson should be at the top and also distinguish that they are the Chairperson by noting "(Chairperson)" next to their name in Attendees part of the minute.

It is very helpful to number your items in your minutes and number these in accordance with your numbered agenda items.

If a document has been tabled during the Meeting there is no need to write any of the detail of the document in the minutes, simply state the title of the document, that the document was tabled at the Meeting and any action points arising from that. You can also add to your minute that “the document [use the title of the document] is attached to and forms part of these minutes” if required.

If during the Meeting it was agreed to do something, then it is best practice to use “ALL AGREED” in your minutes, I also bold this to highlight that this was agreed in the Meeting.

When referring in your minutes to the Meeting you are minuting this should be noted as “the Meeting”, using a capital “M”, this is to distinguish you are discussing this Meeting.

When referring to the approval of the previous minutes, if there are no amendments to note, another tip here is that you can use the wording “The minutes of the previous meeting were tabled and approved, subject to minor amendment”, this is used to save having to table the minutes for approval again if a meeting attendee reverts at the Meeting to say he has noted minor errors. If there is a significant change to be done, then the minutes will need to be tabled again. For example if there are minor typos to do, the minutes will not need to be tabled again, but if there is a change in what is said, i.e. if you had typed it was agreed, when it should have been it was not agreed, these minutes will need to be tabled again for approval at the next meeting.

Keep your minutes clear and precise so that they are easy to understand, a good tip here is, if you can understand what you have typed, you are good to go.

It is important to note that when it comes to writing up corporate meeting minutes there are regulations/good practices to follow and these can differ depending on the country you are in.

Proof read your minutes before sending to the Chairperson for further review, the final review will be by everyone, when they receive the meeting pack for the next meeting, and any further comments will be at the next meeting.

I hope you found the above helpful, and if you would like further help why not download my Minute Taking Guide pack, which includes:

- Minute Templates
- Agenda Templates
- Index of terminology used
- Guide for Minute taking
- Links to devices and apps to help you with your minute taking

For the small price of £19.97

For more information and to find out more about how a virtual assistant can assist you please check out my website <http://www.ljbvirtualassistant.com>