Mastering Meeting Minutes

by Shirley Fine Lee

If you've been asked to record meetings at work or for your work with an outside organization such as the International Association of Administrative Professionals, it's not always easy to know what to record and what not to. Meeting minutes are important. Without good minutes, people can quickly forget what work was accomplished in the meeting. Great minutes not only report the history of the meeting, but future actions and needs of the group as well.

To get started, having a standard format for meeting minutes makes it easy for the person doing the typing to complete the task in a timely manner. However, a standard meeting format is more beneficial to the people reading the minutes as they can quickly move to the section they need when they need it. When developing a record-keeping format for meeting minutes, the minutes should answer the following questions.

- When was the meeting held?
- Who was at the meeting?
- What was the meeting agenda?
- What was discussed in the meeting, including the processes used or lists generated?
- What decisions were made, how were they decided, and why was each decision the best choice?
- If new terms or acronyms were used, what was their definition?
- What actions were assigned?
- If another meeting is needed, when is the next meeting?
- If another meeting is planned, what is the tentative agenda for that meeting?

The primary reason as to why these meeting minutes questions are important to recordkeeping is to provide a historical record of what happened. This history can save time in future meetings and will ensure necessary actions outside the meeting are completed.

To aid recollection, allow for corrections and make sure actions are accomplished, the minutes are typically sent within two days of the meeting.

When was the meeting held?

This is important for keeping historical records of sequential meetings. It is especially important for work teams or continuing projects. If necessary, the reviewer can move backwards through minutes to see all work done by the group on a particular topic.

Who was at the meeting?

It is important to know who was at a meeting in order to understand whether or not the people there were the correct ones. People invited to a meeting should relate directly to the meeting topic and action to be done in the meeting. If a decision is to be made, people who have the authority to make the decision and access to the resources to carry it out should be invited. If the purpose of the meeting is to generate a list of ideas, products, services, issues, etc., then the members may need to be a diverse group of people to get more creative ideas or a focused group to get to the heart of an issue.

What was the meeting agenda?

The meeting agenda is the roadmap for how the meeting should progress. The meeting facilitator is the driver. The facilitator in the meeting is responsible for making sure the agenda is reviewed, agreed to and followed.

A well-designed agenda will include the topic to be covered using action words so the meeting members will know what is expected of them. It will also include the start and stop time for each topic and who is primarily responsible for the success of the topic.

Putting the agenda in the minutes not only gives a summary of what should occur in the meeting, it can be used as a way of evaluating the meeting. For example if the meeting accomplished more than 60% of the original agenda, then it may be considered a very good meeting and a valuable investment of time for the organization. On the other hand, a meeting that accomplished less than 40% of the original agenda may be considered a bad meeting and the cost of holding it may be seen as a loss of time that could have been spent on other work assignments.

What was discussed in the meeting, including the processes used or lists generated?

The minutes should include as much detail about what went on in the meeting as possible. The best way to ensure all the important information shared is captured is to have a recorder at the meeting. This person may record information on flip charts or marker boards so everyone in the meeting can see the notes to aid the meeting process. Or the recorder may track the information electronically using a projector for record visibility during the meeting.

What decisions were made, how were they decided, and why was each decision the best choice?

One of the biggest wastes of meeting time is often the rehashing of a decision because someone was either not there when the decision was made or weeks later cannot remember why the particular decision was made. The need for that decision to be made and agreed to is then brought back up in a following meeting, discussed again by the group and often the same decision is made. If the how and why were recorded along with the final decision in minutes, instead of spending untold minutes remaking the decision, the group can just review the decision in the minutes and then either decide if that decision was wrong or agree that it was correct.

Not only can recording the what, why and how of decision-making help the meeting members in future meetings, it is also very useful to managers. Managers who have teams assigned to projects or problem-solving are often too busy to attend the team meetings but they are still interested in the results. The manager can save time by reading the team minutes rather than having someone report the results to him or her. If the minutes have a specific section for decisions, the manager may go there first to find out what the primary meeting results were. If all the manager's questions are answered in that section, then he does not have to read further. If the questions are not answered, the manager may choose to spend more time reading other details of the meeting or may decide to call the team leader for additional information.

If new terms or acronyms were used, what was their definition?

The reason for spelling out acronyms or defining terms the first time they are used is so everyone will know what they are the next time they are used. This information is also helpful to others who were not in the meeting but may be reading the minutes in order to understand what happened in the meeting.

What actions were assigned?

Assigning actions in a meeting is how work outside the meeting gets done. The actions section of minutes should contain the action to be done, who is responsible for completing the action, and when they are accountable for having it done. This information is not only helpful to the meeting members, but it is helpful to managers reviewing the minutes in understanding new tasks their employees may need time to do. If an action is assigned to someone who was not at the meeting, someone in the meeting must take an action to explain the group's need to the outside person.

If another meeting is needed, when is the next meeting?

This is a pre-planning opportunity for everyone currently in the meeting, if the meeting date and time is not a standing one. It allows for the majority to agree on the best date and time. Putting the date and time is all that is required for the meeting minutes since a meeting reminder should be sent to members once a location is selected later. Finding a location for the meeting based on the desired date and time may be an action assigned or a standard activity for the meeting facilitator or recorder.

If another meeting is planned, what is the tentative agenda for that meeting?

For a meeting to be successful, everyone attending the meeting must agree to the agenda. Therefore, having the group plan the agenda for their next meeting ensures agreement in advance.

To develop the new agenda, first ask the group what they want to be on the agenda based on what they discussed in the meeting, actions that were assigned or issues that are unresolved. After the topic list is created, ask which items are the most important to be accomplished in the next meeting so the agenda can be arranged in that order later. Then ask for estimated time in 10-15 minute increments for each important item to determine if all can be done in the meeting or if something needs to be made into an action or delayed. Actual clock start and stop times can be added to the tentative agenda after the meeting rather than spending everyone's time in the meeting on this. Finally, assign any presenters or subject matter experts as needed.

With the realization that meeting minutes are important records and by asking the questions regarding what is important to have in those meeting minutes, better recordkeeping is the result. Minutes are most effective when sent as soon as possible after the meeting to allow others time to accomplish related tasks. The meeting history in minutes will save time in future meetings and help the meeting members to carry out actions outside the meeting.

About the author:
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