



**Management Insight**

## **Meeting Minutes**

**What, How and Why to do Them Better**

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## Introduction

“Meeting Minutes” I say and hear you groan. If meetings are a waste of time, then their related minutes even more so. That’s certainly true and quite a large part of all meetings are a waste of time. But one cannot deny that there are useful ones (and not too few, either). This article focuses on how to efficiently preserve and share what was discussed in these meetings.

## The What

Meeting minutes, notes or protocols. Different labels for basically the same thing: a comprehensive and (depending on the situation more or less) detailed written summary of what was discussed and decided during any given meeting.

Here are some of the classical elements. You will not need all of them for every kind of meeting. As always: use common sense and adapt this list to suit your needs.

- Meeting name/topic
  - Short and descriptive (e.g. Sales Meeting, Project X Status Meeting)
- Date & Time
  - Add the time zone in a commonly understood format like GMT+2
  - Indicate start and end time (both, planned and actual)
- Location
  - Physical (address, building, floor, room) or
  - Virtual (online meetings, dial in numbers for phone conferences, etc.)
- Invited participants
  - A table is useful. Next to each name you can have a column for attendance (present, absent, excused)
  - Apart from the participants’ names, also add their initials (useful for the list of action items below)
- Agenda
  - Numbered list to make references to agenda items easy
- Notes
  - Here you put what was said and any
  - Decisions that were made (it pays off to highlight those to make it easier to find them later)
- Action Items/Task
  - A comprehensive list of tasks including
  - Task ID (unique value; e.g. AI\_001, AI\_002, ...)
  - Title (a few words identifying, what it is about)
  - Priority (low, medium, high, critical)
  - Owner (initials of the person driving the action item)
  - Status (open, pending, overdue, done, obsolete)
  - Comments (task history with date of each update; e.g. 23/10: article on meeting minutes started. Expected publishing date 25/10.)
  - Opened Date (when the action item was initially discovered and assigned to an owner)
  - Due Date (when the action item is supposed to be done)
  - Closed Date (when it was actually done)

So this is what we want and we want to get all this information in an efficient way. Prepare it, collect it, correct it, share it – and please do it as automatically as possible without constant manual rework.

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*If it is about efficiency in any kind of documentation, templates are always a good starting point.*

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This is how my default template for general meetings looks like:

General Meeting | 00.00.14

Logistics

Invited Participants

Name	Initials	Status
Participant 1	P1	Present
Participant 2	P2	Absent
Participant 3	P3	Excused
Participant 4	P4	Present
Sascha D. Kasper	SDK	Present

Time (GMT+1) and Location

Date:	00.00.14	Location
Start:	10:00	Skype (SDK to initiate)
Planned End:	11:30	
Actual End:		

Agenda

- Topic 1 - P4
- Topic 2 - P1
- Topic 3 - SDK
- Any Other Business (AOB) - All

Notes

- Topic 1**

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa.

Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet commodo magna eros quis urna. Nunc viverra imperdiet enim.
- Topic 2**

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa.

Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet commodo magna eros quis urna. Nunc viverra imperdiet enim.
- Topic 3**

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa.

Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet commodo magna eros quis urna. Nunc viverra imperdiet enim.
- AOB**

None

Action Items

ID	Title	Priority	Owner	Status	Comments	Opened	Due	Closed
AI_001								
AI_002								

**Figure 1: Template for General Meetings**

## The Why

Simple enough. Then why is it that most meeting minutes are one or more of the following

- Not done at all
- Not detailed enough or incomplete
- Too detailed or unstructured to read
- Incoherent
- Confusing
- Unstructured

Even more interesting question: Why do people not seem to mind that? I think meeting minutes have a lousy reputation. Nobody wants to do them and – let's face it – nobody really wants to read them. So why bother with them anyway? Let's agree not to do them and even quit pretending that we want them. Finally we can have guilt-free meetings without having to worry about some stickler for details demanding a written record, which nobody ever reads anyway.

We can also drive around without fastening our seat belts because they are cumbersome and kind of restrict our movements. Still most people do fasten them. For a simple reason: safety.

Obviously (most) meeting minutes are not a matter of physical life and death, but they can and often do have severe influence on business decisions about company strategies, product development, human resource plans, sales initiatives and similar critical topics. While your actual life might not be at risk, your company's or your project's might well be – and surely this could have a severely unpleasant impact on you, too.

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*Just as you don't want to get hit in your car without your seat belt on, you don't want to be caught without a written record of what was said and decided, if and when crises occur.*

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Apart from this gloomy reason, there is also a brighter one: it's simply extremely useful to have a reliable source of information, to which you can refer long after a meeting. Whether it is for guidance in implementing the tasks, which were defined there or just to jog your memory on some exact numbers.

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*It is reassuring to know that there is a **reliable** source of what was said and decided.*

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## The How

Knowing what we want and why we want it, let's see how we can get there. And ideally in an efficient way and not by taking the notes taking and sharing equivalent of the scenic route – we want the highway solution.

### Traditional Approach

You know how it is. People show up for a meeting, the discussions start. After a few minutes one person – most likely the 'highest ranking' one in the room – not quite innocently asks, who is taking notes of this meeting. At that point there is usually resounding silence. Eventually somebody will take this unloved task either because she is the most responsible person in the room and really wants the meeting results to be preserved or because she did 'such a great job of it the other day'. Yeah, right.

### No More!

I don't think it has to be like this.

- Getting useful meeting minutes should not be a pain in the neck.
- It should not be cumbersome and annoying.
- It should not be a burden for some poor sod.

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*Meeting minutes should be and can be easy, fast, efficient, and effective and to everybody's benefit with equally shared responsibility and accountability for their completeness and correctness.*

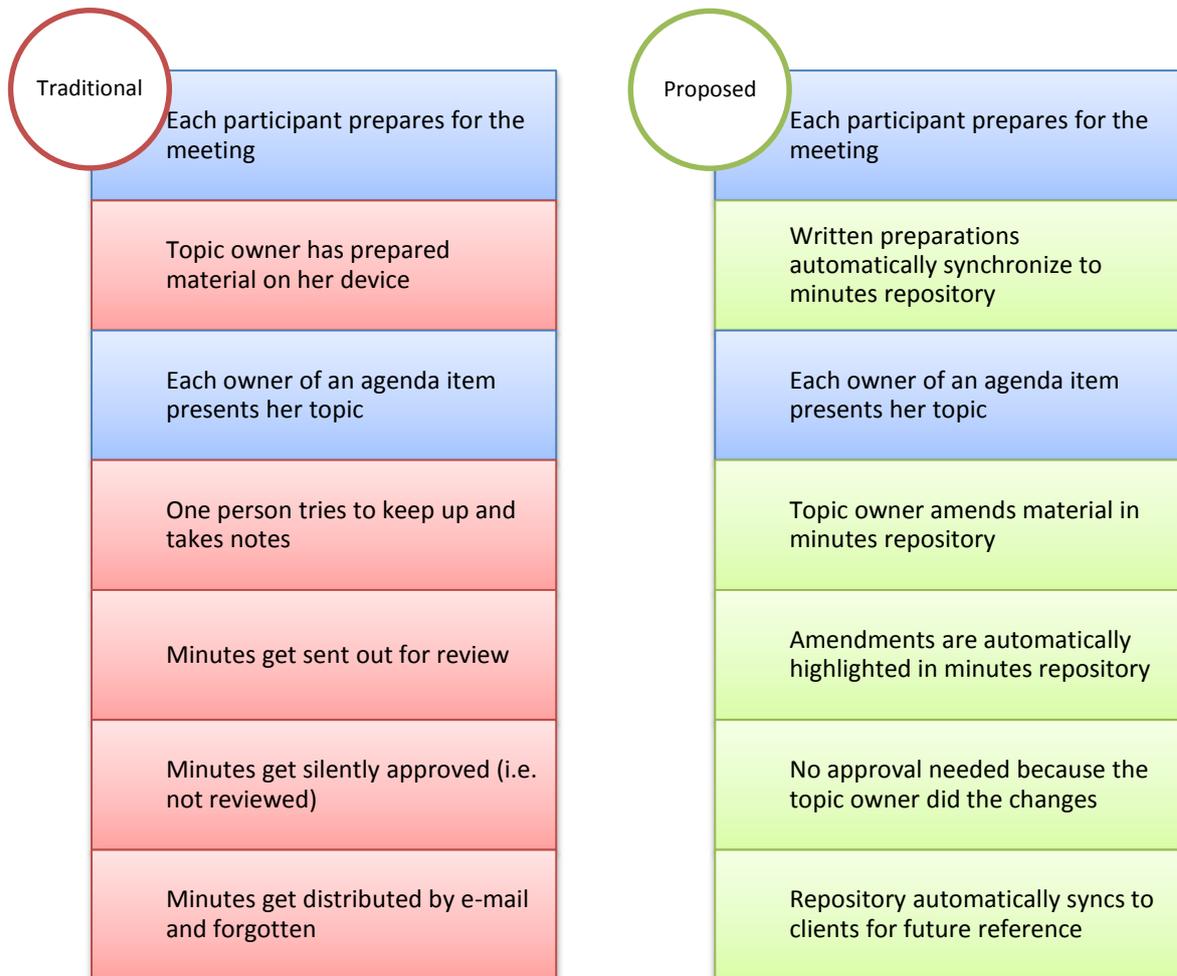
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Sounds too good to be true? Bear with me. Below you can find how I propose to achieve this. I divided the solution in a 'process' part and a 'tools' part.

## Process

The process below should not cause any additional effort compared to any currently existing ones. In fact it will reduce the overall effort, if you consider the improved value of meeting minutes as well as the more efficient way of creating and sharing them. To make this more visible I am comparing the traditional approach to my proposed one.

- Blue items are unchanged steps in the processes
- Green items are improvement over red items



As you can see, there are several very significant changes.

1. Prepared material is made available to participants before the meeting starts.
2. Each topic owner being the expert of the respective topic updates her notes instead of having somebody, who is not as deep in the subject try to do it.
3. Rather than sending notes around by e-mail, duplicating them, having to consolidate them again and so on and so forth, there is exactly one current version in exactly one well known place.

The advantages are obvious

- Less time spent on taking notes
- Better quality of meeting minutes
- No cumbersome approval process creating redundant information and version conflicts
- Automated update and distribution to participants
- Instant access to the current version in a single place



Having said that, let me add that sending your minutes around via e-mail is to be avoided as much as possible. Of course it is not always possible. If you need to share them with participants outside your organization, who do not have access to a common repository, then you will of course have to do so.

## Tools

I only mention two tools here, which serve me very well. I am aware that there are many more and each of them is somebody's personal favorite. I tend not to write about things (or tools), which I am not overly familiar with. So take these two as an example and feel free to use whatever tool suits your needs best.

Note that I am not providing detailed instructions on how to setup and use these tools. Leave the setup to your IT people and for the 'how to use' both provide succinct and comprehensive tutorials for first time users.

## OneNote

This is clearly my tool of choice for this kind of things. It is free, available on all major platforms and background synchronizes to a central repository, where it can be accessed by any authorized user. Being a Microsoft product, it is seamlessly integrated with MS Office suite and can of course use OneDrive or SharePoint as the central repository.

I have been keeping all kinds of notes including meeting minutes in OneNote for years and see no reason to change that practice.

## Evernote

This is very similar to OneNote though the editor is less powerful and intuitive. It is free until a certain amount of data transfer per month – I am using the free version and have yet to run into this limit. Just like OneNote it is available on all major platforms.

After a period of serious usage I find myself using Evernote less and less. OneNote – especially since it is free and now has an excellent touch version for tablets – is my number one tool for this purpose.

## Conclusion

I hope you can agree that it takes comparatively minor effort for getting from wasteful, useless and unloved meeting minutes to an efficient system of building and maintaining a reliable source of important, sometimes vital information.

As always, this change require a potentially painful transition phase but in the end it will be well worth it in both, cold hard cash due to saved time and prevented mistakes as well as in softer aspects like peace of mind.