



HOW TO WRITE PERFECT MINUTES OF A MEETING?



Editorial

Messaging applications and emailing could lead to a move away from formal meeting minutes. While it may indeed seem unnecessary at times, never doing so would be a mistake and risk putting you in an "open loop" situation where you never take stock of the relevance of your decisions and the performance of your actions.

The meeting report is THE document that will enable you to formally identify risks, take into account the impacts, report on the progress of the implementation of your strategy or project, and align your team with the best decisions to be taken at a given moment.

The aim of this ebook is to remind ourselves of the best practices to implement in order to write an effective report in the light of digital developments.



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The meeting minutes are the expression of the alignment between your team, your decisions and the actions that follow from them. The more fluid, economical and ritualistic it is, the more advanced the organisation will be in terms of operational excellence.

Lionel Pasco - CEO of Perfony



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Meeting minutes: what are they?



To be effective and lead to concrete decisions, a working meeting must be well prepared by the various participants. At the end of the discussions, a report summarising the exchanges must be produced and sent to each member. Whether it is a team meeting, a general assembly or a management committee, as soon as several employees officially meet, it is necessary to keep a record of what was said.

A meeting report is a synthesis of the information and decisions that have been taken. In the heat of the moment, it is the expression of a perspective that should realign a group towards its common objective. Its form must meet precise criteria and respect different stages of drafting to be as efficient as possible.

It is a written document whose purpose is to summarise as faithfully as possible the discussions and decisions taken during a meeting. As such, it also sets out the context and the agenda.

Once written, the writer should send this summary document to all the participants, as well as to those who are not present, so that they can see the progress made.

It is necessary to know how to take minutes of a meeting so that the decisions taken do not go unheeded. Before we provide you with some useful tips, let's ask ourselves some basic questions.

What is the point of this document?



The working meeting is an essential time in the functioning of an organisation. Keeping a record of it serves several purposes.

First of all, it makes it possible to bring together and align a group around common issues: risk and results management, implementation of a transformation, etc., and to transcribe the decisions taken.

It records and serves as a memory to remember when and why a decision was taken, to keep information and to trace the history of projects, these elements being the memory of the life of the company. In some organisations with a high level of certification and control, the minutes, potentially associated with the signature of the participants, serve as an opposable basis for any form of audit.

It is the basis for setting up a coherent and effective action plan with steps to follow and whose results and progress can be measured from one meeting to the next, thus ensuring that the actions we carry out on a daily basis serve a purpose in line with the organisation's strategy.

Its media function allows it to be a source of information disseminated within the organisation and thus a tool for communicating strategic decisions to other members of the group.

Who is it for?



The meeting minutes are a summary tool intended for all participants in a meeting or committee, as well as for those who are not present, so that they can see the progress and decisions made during the meeting.

The report is also intended for higher levels of management. It will serve as a basis for ensuring that its content is in line with the objectives and the desired strategy.

It is also a key element in the implementation of actions in the field. The decisions recorded in the minutes will be translated into concrete actions in the field.

Who should write it?



Even if some tools nowadays allow the recording of the report by voice, the formatting and substantive consistency still requires human intervention.

If you have an ad-hoc secretariat in your meeting whose task is to take the minutes, the question of "who" does not arise.

For the others, there is always one or two people in the group who will be more inclined to take notes and write.

However, it is customary for the writer never to be the facilitator of the meeting. Unfortunately, this is a common mistake and the result is that the moderator spends his or her time between moderating (which is a job in itself) and taking notes while the other participants wait. You have to know how to delegate because you can't do everything, and it's also a way of involving the other participants and making them active.

The useful advice is to rotate the role of "scribe" among the participants. Firstly, because it forces you to know how to do the exercise and to be concise in your speaking time, knowing that when you are a note taker, you will appreciate that the participants are also note takers.

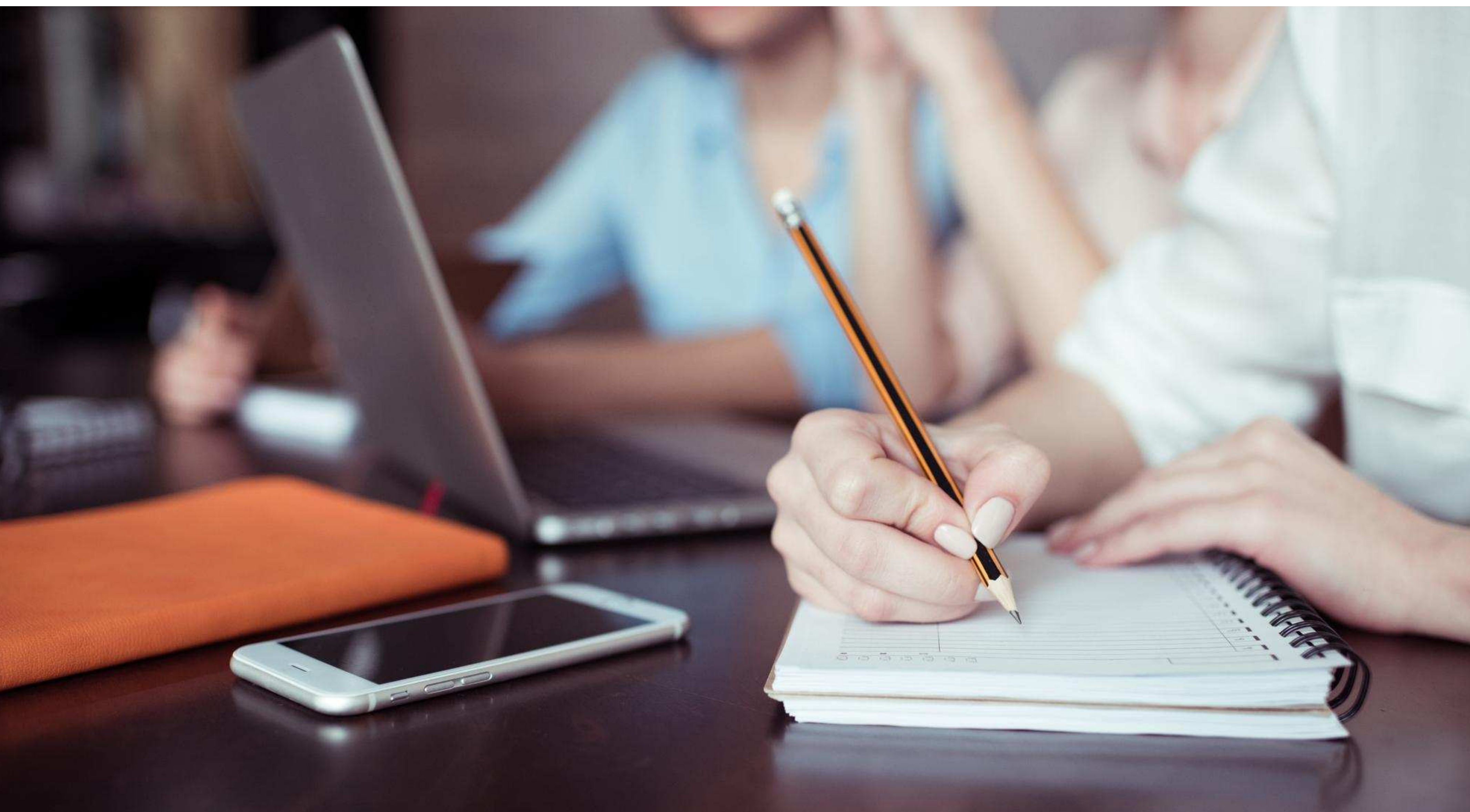
How to take notes during the meeting ?

It is important to give a clear account of the exchanges in the form of a clear presentation divided into several paragraphs with a clear title.

Indeed, the dissemination of this summary will also be made to absent members and should therefore reflect the exchanges that took place.

Depending on the type of meeting, the minutes will be presented either in detailed or summary form. In both cases, the reader should be able to quickly grasp the purpose of the content. In order to ensure that any verbal exchanges are properly transcribed, the role of a writer is important, as we have seen.

So how do you take notes for a meeting report? What form should be used to record all the decisions taken during the meeting and still have a readable summary?



The key to taking notes and formalising the minutes lies in three concepts that must be visually distinguished for each of the subjects discussed:

- **Information** related to the topic:
This can be the discussion between the participants during the meeting, but also a side presentation, key figures from a scoreboard, etc.
- **Decisions** taken:
Possibly indicating how the decision was taken (vote? by show of hands? by using a voting application? unanimously? etc.).
- **Actions** to be taken:
A decision without an action plan will remain at an incantatory level, whereas it is intended (if decided) to be implemented.

At the end of each agenda item, and in case of doubt about the decision(s) and actions, the writer should ask for clarification.

The effectiveness of the resulting minutes depends on the clarity of the decisions taken (if it is unclear, there is a wolf) and on the agreement of the participants on their roles in implementation.

- So :
- Number the decisions, this will allow a log of decisions to be kept and the history to be easily traced.
 - For each action: have clearly identified the "what", the "who" and the "for when". And that the 'who' (the person responsible for the action) agrees.

Use a pre-formatted template: to save time in writing and therefore disseminating the minutes, take your notes as if you were producing the finished product directly, so the final formalisation will be a simple proofreading.



Use a tool that will allow you to add images and elements that will support the "information" part if necessary.

Obviously, care must be taken with the language, grammar and spelling, which goes without saying but is better said. Your image and the image of the organisation are at stake.

TIPS

If you use a lot of acronyms related to your activity, think about making a lexicon of them from time to time: you are not safe from a newcomer who will have difficulty understanding their content.

Even if they are supposed to know the in-house vocabulary, this will speed up their "onboarding" and ensure that they understand the content of your report right away.

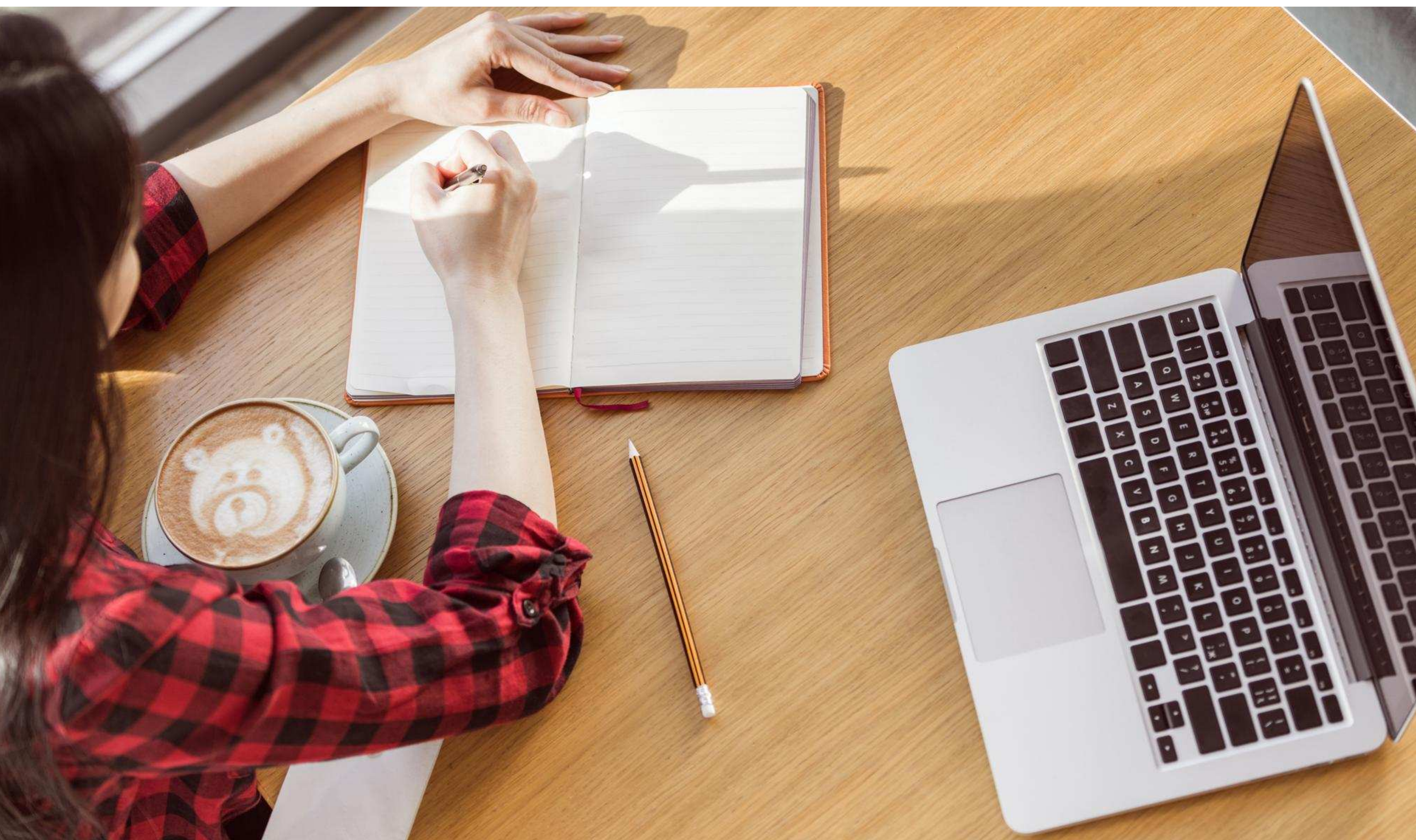
4 steps to writing meeting minutes

The minutes of the meeting state the facts, the issues, the decisions taken and the actions to be taken. The first thing to do is to give the document a title. This title will recall the name, date and sometimes the subject in the case of a single subject or a thematic steering committee.

Write headings according to the agenda and make paragraphs airy. Take care to list in a table the names of the members present, absent and excused, who will also be the recipients of this summary. If necessary, you can also include an insert for signing in.

Identify key decisions, important information, and highlight next steps.

There are 4 main steps to follow.



1. THE PREPARATION

One of the key steps in getting good minutes is the questioning phase. Who writes the minutes (secretary, external person, etc.)? Who is the substitute if he or she is unable to attend? What medium should be used? Will this format facilitate the distribution of the minutes? What is the maximum number of words the summary should contain? Ask yourself the question of equipment. Sometimes it is necessary to record the voice in order to keep a record of all the exchanges. These are all elements that need to be addressed beforehand in order to set the stage for the writing phase.

2. USE A PRE-SET TEMPLATE FOR GOOD REPORTING

From the header to the conclusion, it is useful to rely on a certain formatting. A ritualised form helps the effectiveness and sustainability of the exercise:

- the title of the session and the place where it is taking place
- the day's date, start and end time, duration of the session;
- list of participants present and absent;
- agenda: topics discussed and purpose of the meeting;
- decisions taken and actions to be taken;
- responsibilities of those involved;
- summary of the most important points;
- reminder of deadlines;
- date and place of the next meeting.

3. TAKE CARE OF THE FORM AND THINK OF THE READERS OF THIS DOCUMENT

To make your meeting minutes easier to distribute, make them attractive. Space your paragraph headings well. Use bulleted lists and summary tables (especially at the end of the document). Don't forget to highlight the title or important words to make it easier to remember. The meeting minutes are a reference document for all members. When writing them, think about people who are not present at the meeting and who may see the document. Agenda, purpose of the meeting, remarks... all these elements should be mentioned concisely in your minutes. Make sure you use short sentences and accessible vocabulary so that the reader can understand.

4. DISSEMINATION

Have you followed all the steps in writing to ensure that you are successful in this exercise? Don't forget the dissemination method. All participants must have quick access to this document in order to prepare the next working meetings. Make sure you identify the most appropriate means of distribution: email, website or collaborative platform.

Our advice for an operational report



The recorder should not be the facilitator of the meeting

The person in charge of drafting should not be the one leading the meeting. This is not only because you cannot do two things at the same time, but also to spread the load of the meeting.

Don't delay

Minutes should be taken immediately after the meeting or within 24/48 hours maximum. After this time, the task will be tedious, as memory can play tricks and the freshness of the exchanges has disappeared. Furthermore, too much time between the meeting and the minutes can be a sign of a disconnect with the reality on the ground, which is less expected.

Give preference to note-taking on the computer

Good note-taking ensures the quality of the final document. Doing so on the computer saves time and ensures that the essential points are remembered. It will also allow you to prepare the final version more quickly.

Proofread

For a clean report, it is best to read aloud to identify any repetitions and errors. One tip for efficiency is to read from the bottom to the top. If you do not have enough time, let the document rest for a few hours. Another tip is to have another person in the group read over the report to ensure that it is consistent and relevant.

Use a specific tool

With specific software like Perfony, you can create, manage and share your meeting minutes from a single tool, simply and efficiently. You can easily link decisions to actions and keep a log of decisions made over time automatically.

YOUR MEETING MINUTES TEMPLATE

Looking at different templates for meeting minutes is a good way to get yours right.

Always keep in mind the function of the document and do not neglect either the content (agenda, important decisions, etc.) or the form (purpose, simplicity for the reader, etc.).

We have created a universal minutes template that you can use for all types of meetings.

Download your universal meeting minutes template

I DOWNLOAD



PERFONY: THE IDEAL TOOL FOR YOUR MEETINGS

Benefits of using Perfony for meetings



- Centralize all the activity of your meeting: participants, agenda, minutes, documents, comments...
- Identify important issues or manage risks to the company
- Track decisions made and measure the performance of actions
- Simplify reporting on efficient and dynamic models and dynamic models
- Easily follow the progress of topics
- Save time to focus on your strategy and your teams
- Gain mobility in all your uses
- Simplify life with Teams, Outlook and other integrations
- Lighten the mental load of teams
- Strengthen your management, be easily exemplary and regain control of the management

Contact

Perfony is a French publisher, born from the meeting of the world of management consulting and IT, which has given itself the ambitious project of enabling "Better, Working, Together", at all levels of an organisation.

To do this, it offers a simple tool that combines simplified project management and a collaborative workspace to improve the efficiency of teamwork: meeting minutes, monitoring of action plans, traceability of decisions, document management, compliance with quality requirements, etc.

Perfony is the solution that helps you achieve operational excellence.



perfony

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