HOW TO TAKE GREAT MEETING NOTES

Meetings: Love ‘em or hate ‘em, some plans and decisions need in-person discussion to move forward. And if those plans or decisions aren’t documented, they may as well have never happened.

THE Art & Science OF LEADING PROJECTS

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That’s why meeting notes are an important outcome for any meeting—large or small. They help teams to communicate overall discussions, decisions, and most importantly, action items.

Meeting minutes often fall to the wayside because people get so caught up in the discussion they forget to take notes. And some people just have a hard time keeping notes in general. So let’s dig into some simple tactics that make taking and sharing meeting notes easy for you.

WHO SHOULD TAKE MEETING NOTES?

Whether your meeting includes many voices and agenda items or is hyper-focused in size and nature, you invited each person to the table for a reason. And most attendees have an opinion or point to contribute to the discussion. So how do you decide who takes notes?

A simple rule of thumb is to assign note-taking to a single person. If you're lucky, you can bring in an outside resource to scribe notes. It's a dreamy notion (and not always possible) so a project manager often takes on the task.

Just be sure everyone's clear on who's been assigned note-taking duties. This is important because you want your other attendees to be able to focus on the meeting agenda and discussion without the burden of taking notes.

TIPS FOR EFFICIENT NOTE-TAKING

First, it must be said: There is no "right" or "wrong" way to take notes. If you're able to capture key points and action items, you're on the right track!

DO YOUR PREP WORK

Documenting meeting notes is a big responsibility, so make sure you're fully prepared.

Before showing up for the meeting, review the agenda thoroughly and understand the purpose of the discussion. For instance, will attendees make a decision? Will they discuss future plans? Knowing the goal of the meeting will help you anticipate what you need to capture in terms of discussion points and action items.

Once you arrive at the meeting space, pick a good seat. You want to position yourself so you can see and hear all attendees as much as possible. The more conversation you can listen to and body language you can observe, the better you'll be able to translate the mood of the meeting.

NOTEBOOK OR LAPTOP?

What works best for you: writing or typing? Many people choose to write notes so they can go back and refine them as they type them out. That feels like an added step that costs a lot of time, but do what's most comfortable for you. Just keep in mind that timeliness is key when it comes to follow-up.

If you don't think you'll have time to type out your notes and deliver a timely follow-up, you may want to try using a laptop. It may take some getting used to, but practice makes perfect. Sit in on a few meetings—or watch a TV show or training video—and practice taking notes on your laptop. You'll be amazed by how quickly a little practice speeds up your typing skills!

STRUCTURE YOUR NOTES

If you're practicing good meeting facilitation, you'll have a set agenda and attendee list. So use that info to create a meeting outline as part of your prep work. That way you can fill content in where needed during the meeting.

Here's an example of how your meeting outline might look:

Date:

Meeting purpose:

Meeting attendees:

Agenda item #1:
- Discussion points
- Action items (item and assignee)

Agenda item #2:
- Discussion points
- Action items (item and assignee)

Agenda item #3:
- Discussion points
- Action items (item and assignee)

Wrap up, next steps: (item and assignee)

Starting with a general framework for your notes keeps you from having to spend time formatting while trying to capture minutes in the meeting. And because meeting discussions can jump from topic to topic, having a structured outline allows you to follow the conversation and keep relevant notes together, without missing key points.

KEEP IT SIMPLE

It's so easy to get stuck in the mindset that you have to capture every single word in meeting notes. But looking back at what's been most helpful in meeting follow-ups, it's clear that key points do the job just fine.

Here are a few tips to help you keep it simple:

- Stick to what matters—key points, debates, discussions, and of course, action items.
- Use short sentences and bullets.
- Capture keywords and phrases.
- Take notes in your own words, and only use verbatim quotes when absolutely necessary.

ABBREVIATIONS AND TEXT EXPANDERS

Want to go faster? Feel free to abbreviate words anytime. Just make sure anyone reading your notes can understand your abbreviations (or edit them after the meeting). Whatever you can do to capture notes quickly and keep up with the discussion is going to make your job easier.

If you take a lot of notes on your laptop, you might consider using text expansion or auto-correct, a technology that recognizes and translates keywords into full words or phrases. If you use a smartphone, you might have this enabled—and it might make you send some unintelligible texts!

For instance, you might want to set up a rule for a long word like "management" so typing "mgt" automatically expands to the full spelling. The options are endless and totally customizable, so experiment with it until you find your own efficient groove.

EDITING

We all make typos—but don't get hung up on them when you're actively taking notes. Push past them and rest assured you can fix typos later. You should always proofread your work anyway. Focus on capturing the best notes possible in the meeting, then go back and edit your notes as soon as possible afterwards.

The sooner you edit notes after the meeting, the better you'll be able to remember the context and details of the conversation. This is important because it enables you to clarify notes where needed so they'll be more accurate and helpful for your team and stakeholders.

SHARING

The most important thing you can do is share your meeting notes once they're complete. While email is the easiest way to do this, you may want to consider using an app that's accessible to everyone and allows for collaboration.

If your team uses tools like TeamGantt or Google Docs, ask team members to review them and add their own updates or clarifications. After all, you're human. There's a chance you'll miss—or possibly misinterpret—something. If your team can help clarify or edit meeting notes, you'll all benefit.

TEST AND REFINE YOUR NOTE-TAKING PRACTICES

There are many ways to take notes, and it's truly up to you to find what works best for you. Use these tips to hone your skills and establish a simple framework for documenting meetings so you can try new approaches and refine your craft as a top-notch notetaker.