Taking meeting notes may intimidate you with its many challenges, among them knowing who is who, following the discussion, deciding what to record, ensuring accurate and complete notes, and sounding professional—all while managing your own stress. Here are tips on managing those challenges to produce efficient, effective notes and minutes.

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Challenge 1: Knowing Who Is Who.

At a large meeting or one in which you don’t know everyone, keeping track of attendees can be difficult. Try one or more of these tips.

- Circulate a sign-in sheet after everyone is seated. That way, the list of names will match the order in which people are sitting, and you will know each speaker. If your group uses academic titles (Ph.D., etc.), ask attendees to include those so you won’t have to track them down later. If you will distribute the meeting notes based on this list, ask for email addresses too.
- Create a roster before the meeting. At the meeting ask attendees to verify that their names and titles are correct.
- Use name tents to identify attendees. With tents, also use a sign-in sheet or roster for an easy list of all attendees.
- Get business cards from guests so you can include their names and affiliations correctly.
- Sit next to an attendee who knows everyone and can answer your questions during the meeting.
- If some people attend by telephone, get their names in advance and confirm them at the meeting start. The meeting leader should ask every attendee (present or on the phone) to give his or her name when speaking.

Challenge 2: Following the Discussion.

When the language or topics are complex, the discussion may be difficult to follow. To stay with it:

- Get the agenda, handouts, and slides before the meeting. Review them for topics and terms you do not recognize, and do quick research before the meeting. If you will use a computer to take notes, create autotext entries for words that are long or difficult to spell.
- Check the agenda before the meeting to determine its purpose. If the purpose is not clear, ask the meeting leader what to anticipate.

Another reason the discussion may be hard to follow is that the goals of the meeting are not apparent. Is the group presenting, discussing, or deciding? To reduce this challenge:

Challenge 3: Deciding What to Record.

It is not useful to write who said what when. Here are questions your notes should generally answer:

1. Which meeting was it?
2. What was the purpose of the meeting?
3. When did the meeting take place?
4. Who attended? Who did not? (if it matters)
5. What topics were discussed?
6. What decisions were made?
7. What actions were agreed upon? Who is to complete them? By when?
8. Which topics were tabled for the future?
9. What materials were distributed? Where are copies available?
10. Is a follow-up meeting scheduled? When? Where? Why?

Before the meeting, review the questions above with the meeting leader to get agreement on the type of content you will record.
Challenge 4: Ensuring Accurate and Complete Notes.

To improve accuracy and completeness:

- Ask a question during the meeting whenever a point or decision is not clear.
- Ask for the spelling and definition of unusual terms during or right after the meeting.
- Offer to summarize the decisions, action items, and tabled issues for each topic, if appropriate, before going on to the next topic.
- Be sure to ask a question when you are not sure about any action items or decisions. They may be the most important outcomes of the meeting, so you must not guess. Get clarification during the meeting—not afterward.
- Write the final draft of the notes as soon as possible. Before the meeting, block out an hour or more on your calendar to review your notes and complete them at the end of the meeting.
- Have the meeting leader or sponsor review and approve the notes before you distribute them. If the leader requests a change in the notes that you believe is wrong, find a tactful way of addressing the issue. As note taker, you are responsible for the final product.

Challenge 5: Sounding Professional.

In meeting notes “sounding professional” means creating a clear, easy-to-read document. Apply these strategies:

- Use a crisp, clear format and specific headings so readers can skim for the information they need.
- Cover important topics first, then minor ones. Do not cover topics in chronological order unless that order makes sense.
- Avoid personal comments and editorializing such as “I agree” or “a heated discussion.”
- Avoid contractions (he’s, didn’t) in formal notes and minutes.
- Write in complete sentences and bullet points.
- Use your grammar and spelling checker, and proofread carefully. Double check proper nouns, headings, numbers, and formatting consistency.

Read through the final draft checking for clarity and correctness of the decisions and action items.
- Ask for sample meeting notes when you are filling in as note taker for a group. Use a tone and style that are similar to the sample.

Challenge 6: Minimizing Your Stress.

The job of summarizing an important meeting can feel like a heavy burden. To minimize stress:

- Do not agree to take meeting notes if you have an important role at the meeting or if you are completely unfamiliar with the topics and participants.
- Come prepared with sample notes or a template to fill in. To create a template, use the questions listed under Challenge 3.
- Let the meeting leader know that you need certain information and resources to prepare effective notes. Among the essentials are an agenda, a roster of attendees, and the handouts and slides. If the room is large, you need a central position to hear all the speakers. You may also need an experienced attendee sitting next to you to answer your questions.
- Recognize that meeting notes are not a transcript. They are a summary of the topics, decisions, and action items. Your job is not to capture every thought.
- Take notes in a way that works well for you. If you will use someone else’s computer, become familiar with it before the meeting to ensure that it has a comfortable keyboard, the software you need, and a reliable power source.
- If you take notes by hand, number your pages to make your writing job easier.

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