

[ubiquus]

[Tips for Excellent Minute Taking]

Ubiquus UK
Cliffords Inn - Fetter Lane
London EC4A 1LD

t: 020 7269 0370 - f: 020 7405 9884
W: www.ubiquus.co.uk – E: infouk@ubiquus.com

1) Understand the meeting.

Accuracy

Meeting minutes have no value if they are not accurate.

Names and terms, especially the organisation's own jargon, must be spelled correctly. And if you are taking minutes without the backup of an audio recording, you need to get it right the first time in your notes: there is no second chance. It's very difficult to take accurate notes if you are unfamiliar with what you're hearing.

Preparation

A good minute taker will prepare him or herself ahead of the meeting.

Make sure you understand the agenda and review related documents, such as minutes from previous meetings, related hearings or interviews. Based on these documents, build a glossary of names and terms. A good glossary makes minute taking easier, faster and more accurate.

Some people believe that only someone from the same organisation - or even the same department - can understand the meeting well enough to take accurate minutes. As independent minute takers, we find this simply isn't true.

In fact, many times someone less intimately connected to proceedings can actually take better notes. An outside minute taker will often be able to hear and record what was actually said, without "reading into" the connotations.

A lot of organisations waste a lot of time reviewing and correcting minutes. Make sure your organisation isn't one of them.

2) Make the time.

Taking good meeting minutes takes time. Leave ample time for preparation, for the meeting itself, and for writing up the minutes after the meeting.

Set up

Following the preparation described above, make sure you take the time to arrive at the meeting with plenty of time to set up properly. After the meeting, you will need to clear up any questions as quickly as possible. Ideally the minute taker and the chair, or another representative, should speak immediately (and briefly) after the meeting to clarify any new names and terms.

Fresh

Write up your notes while the meeting itself is still fresh in your mind. Professional minute takers generally write up their meeting notes in the hours immediately following the meeting, and certainly within 48 hours after the end of the meeting. Sometimes it can take organisations days or even weeks to complete and circulate meeting minutes. A delay in circulating meeting minutes usually means a delay in taking action. Prompt meeting minutes are likely to be not only more accurate, but more effective.

Duration

How long should it take minute takers to write up their notes to create finished minutes? This depends on many factors, including the minute taker's skill and the complexity of the meeting. Inexperienced minute takers often underestimate how long it will take them to create the final minutes – leading to a final document that is difficult to read, inaccurate, or badly delayed.

3) Set up for success.

Early

For the meeting itself, make sure you know where you'll need to go. As a minute-taker, there is nothing worse than rushing into the meeting at the last minute – unless it is arriving late! Leave ample time for train delays and traffic jams, and ensure you have any necessary security clearance in advance.

Prep

At the meeting, sit where you can see and hear proceedings clearly. Prepare your materials for the meeting: your laptop or notepad, your audio recording device (if you are using one), your agenda.

4) Total neutrality.

Debate

A good meeting often brings together people who have interesting ideas and a lot to say. Sometimes this means that debates can get contentious, even heated. Neutral, objective minute-taking is all the more important in the face of controversy. So make sure you don't take sides – either in the meeting itself or in your minutes.

Participation

At a purely practical level, the minute-taker should not be participating in the debate. It's terribly difficult to scribble or type and talk at the same time. Perhaps even more important, the minute taker must be seen by the other participants as being objective.

Ideally, the person taking minutes should have no personal interest in the outcome of the meeting.

5) Be a good gardener: know when to prune.

A hallmark of good meeting minutes is the right balance between in-depth coverage of complex topics, and concise summary and paraphrase of repetition.

Speed

Yes, a certain amount of physical note taking speed is necessary – but it's not the most important skill. A good minute taker also knows when not to type or write. In these moments, the minute taker will probably be pausing, listening, rephrasing and mentally summarising. It's also important that the minute taker can express the information clearly.

Information

The amount of information that the minute taker includes – what Ubiquus calls the “depth of coverage” – should vary according to the purpose to which the minutes will be put.

Depending on the purpose, the right choice for minutes can vary from a very concise summary to a word-for-word transcript.

The depth of coverage should always be agreed by the organisation in advance.

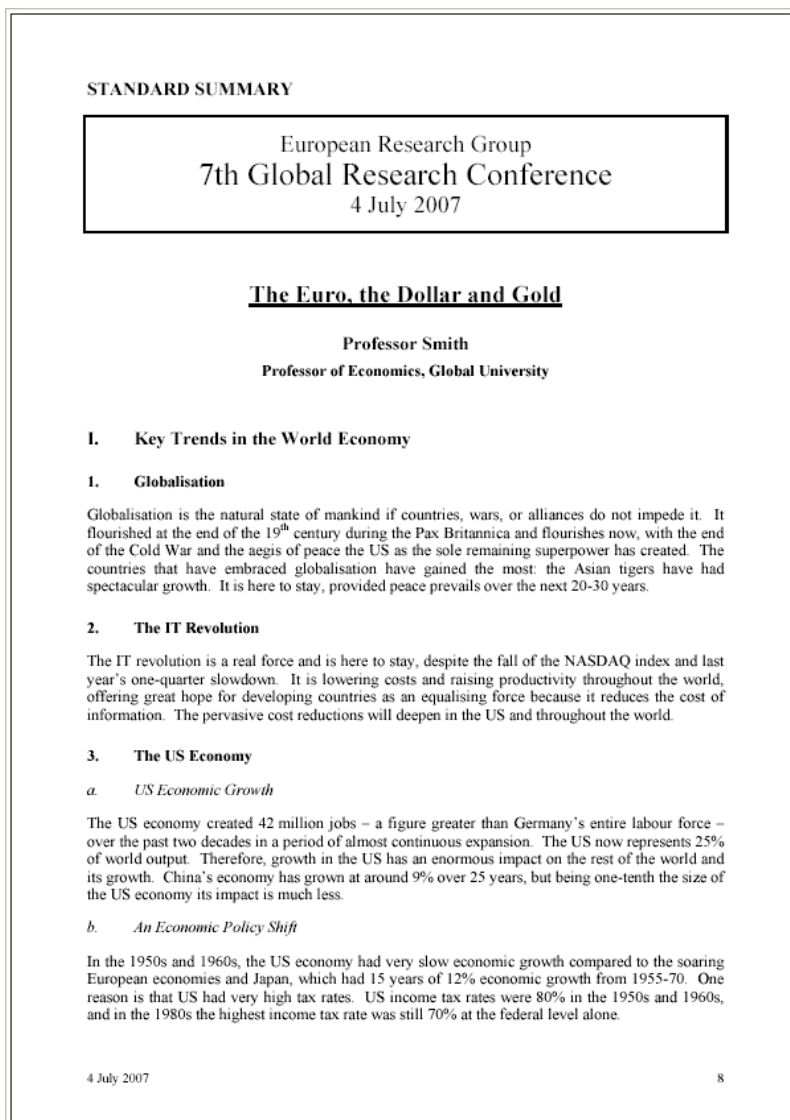
6) Use a consistent template.

Layout

The layout of meeting minutes doesn't need to be fancy. But it does need to be well-designed for its purpose. And because the purpose varies from one type of meeting to another, the layout of the minutes may vary, too.

Consistency

Regardless of the exact appearance, the template used by the minute takers should also make it easy to locate important information, and it should be consistent across a series of meetings.



Example of a template used by Ubiquus for a Standard Summary

Style

The concept of a template also includes the style of writing, such as the level of formality of the writing and "house styles" for names and abbreviations. If a number of individuals will share the minute taking responsibility, make sure they're all using same template, the same glossary, the same understanding of how much information to record, and the same style of writing.

7) Four eyes are better than two.

Proofreading

So you're the minute taker. You've typed the final full stop and proofread your own work. Is the document done? No. At this stage you are no longer the best person to review the minutes – no matter how skilled you are. You need an editor.

Proofreading

Working in partnership with minute takers, editors give feedback to help minute takers improve both an individual set of meeting minutes and their minute taking work in general. When you're taking meeting minutes, choose an editor who has good writing skills, an eye for detail, and the time to review your minutes while they are still fresh in your mind.

The editor needs to assess whether the minutes are clear, easy to read, free of typos, in line with the agreed template. They also need to check that spellings of names and terms agree with the glossary. Contrary to what you might think, the editor does not need to have attended the meeting. In fact, someone who hasn't attended will bring a fresh point of view to whether or not the minutes make sense. If your minutes make sense to an outside reader, you are well on your way to taking good minutes.

8) Call in the professionals.

There are many reasons that good in-house minute takers choose to call in the professionals. These reasons can include a need for additional capacity, an additional level of skill, or faster delivery.

Skill

Professional minute takers can augment the service provided by in-house minute takers. In addition to having excellent writing skills, a strong eye for detail and excellent general knowledge, professional minute takers also often develop specialities over time in particular types of meetings or industry sectors – giving them the ability to deal with extremely complex meetings.

Speed

Furthermore, professional minute takers are fast. They start with a natural knack for decisive summary choices, combined with good typing speed. Then training helps them hone their natural skills. And since taking professional meeting minutes is all they do, their time is wholly dedicated to getting the minutes done – the same day, if necessary.

Availability

Finally, professional minute takers are available, even at the last minute. When you are busy with existing meetings, calling in a professional can boost your organisation's capacity.

With that in mind, in-house minute takers – including very good ones – sometimes decide to call in the professionals. Perhaps a meeting is particularly complex; maybe the minutes are needed extra quick; maybe there is a sudden glut of meetings that exceeds internal capacity. As a good minute taker for your organisation, part of your job may be knowing when to make an intelligent decision and recommend professional minute takers for specific requirements.

To help you take this decision, we've put together a few tips on :



When to choose professional minute takers