

Board

# A Meeting Minutes Template

for High-Impact Decisions

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# Introduction

Meetings are important for cooperation and decision-making, but their actual worth depends on successful communication. Unfortunately, inefficient board meetings frequently hinder productivity improvements.

Data reveals that managers spend over half their workweek in meetings, amounting to an estimated annual cost of up to [\\$375 billion due to ineffective gatherings](#). This staggering lead emphasizes the need for robust tools and approaches to optimize meeting effectiveness.

Thus, [McKinsey's research](#) identifies three essential purposes for productive meetings:

- Decision-making: quarterly reviews, policy debates, budgeting sessions, and strategic brainstorming.
- Collaboration and action: hackathons, planning sessions, and project kick-offs.
- Information sharing and connection: company-wide updates, briefings, and team-building events.

# Meeting minutes template

The template, based on best practices and adaptable to various meeting circumstances, enables the accurate and concise capturing of key decisions, action items, and discussion topics.



## Meeting details:

- Meeting Title
- Date: [date of meeting]
- Time: [start time] — [end time]
- Location: [meeting location]

## Attendees

- List attendees, including names, titles, and a space for marking presence

## Absentees

- Absent list attendees

Topic	Time allocation	Presenter or lead	Notes
Call to order and welcome	5 minutes	Meeting leader	1. Welcome attendees and introductions.
Review and approval of previous minutes	5 minutes	Designated person	1. Vote on approval of minutes. 2. Briefly summarize key decisions and action items from the previous meeting. 3. Address any outstanding questions or concerns.
Agenda review	5 minutes	Meeting leader	1. Briefly walk through each agenda item and estimated time allocation. 2. Identify any potential concerns or dependencies between items. 3. Confirm agenda order and adjust if necessary.
Action items and next steps	20 minutes	Meeting leader	1. Review outstanding action items from previous meetings. 2. Discuss progress, roadblocks, and updates on each item. 3. Assign new action items, owners, and deadlines.
Project updates	Optional	Everyone	1. Each team or individual assigned to a project provides a succinct update. 2. Highlight key achievements, milestones reached, and potential challenges.
Open discussion and questions	15 minutes	Everyone	1. Facilitate open discussion on agenda items or relevant topics. 2. Encourage active participation and address questions raised. 3. Note key points raised and any decisions made during the discussion.

Topic	Time allocation	Presenter or lead	Notes
<b>Client presentation</b>	Optional	Everyone	<ol style="list-style-type: none"> <li>1. Briefly summarize the presentation's key points and objectives.</li> <li>2. Capture client feedback, reactions, and questions.</li> <li>3. Note any action items or decisions resulting from the presentation.</li> </ol>
<b>Brainstorming session</b>	Optional	Everyone	<ol style="list-style-type: none"> <li>1. Clearly define the brainstorming challenge or issue.</li> <li>2. Encourage creative ideas and open thinking.</li> </ol>
<b>New business</b>	Optional	Everyone	<ol style="list-style-type: none"> <li>1. Discuss any new topics or issues not previously on the agenda.</li> <li>2. Prioritize new items and determine if further discussion or action is needed.</li> <li>3. Assign ownership for follow-up on any new business items.</li> </ol>
<b>Old business</b>	Optional	Everyone	<ol style="list-style-type: none"> <li>1. Briefly revisit any outstanding matters from previous meetings.</li> <li>2. Resolve any lingering questions or concerns.</li> <li>3. Update status or action items related to old business.</li> </ol>
<b>Project updates</b>	Optional	Everyone	<ol style="list-style-type: none"> <li>1. Each team or individual assigned to a project provides a succinct update.</li> <li>2. Highlight key achievements, milestones reached, and potential challenges.</li> </ol>
<b>Adjournment</b>	5 minutes	Meeting leader	<ol style="list-style-type: none"> <li>1. Meeting adjourned at [Time].</li> <li>2. Summarize key takeaways and decisions made.</li> <li>3. Confirm the next meeting date, time, and location.</li> </ol>

# The practical recommendations for using the template

To make the most of your meeting minutes template, it's important to use it effectively. This involves navigating its structure, tailoring its content, and optimizing its use for positive outcomes.

By implementing best practices, you can make the template a dynamic tool that fosters collaboration, enhances communication clarity, and empowers effective action.



**1** Attachments and supporting documents

**2** Instructions for presenters

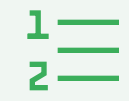
**3** Clear meeting notes



# 1. Attachments and supporting documents

While the meeting minutes alone record the major decisions and discussions, including related attachments enhances their value and adds insight. This is especially important when aiming to reduce participants, as a comprehensive document serves as a valuable reference point for anyone who couldn't attend.

Rather than just documenting decisions and discussions, the minutes may be improved by including a brief overview of the main takeaways, as [Harvard Business Review recommends in their "Running Meetings"](#) guidance. This guarantees that everyone, regardless of attendance, feels informed and involved in the meeting's outcomes.



## Prioritize & embed strategically

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- **Essential documents**

Prioritize important papers such as project plans, presentations, or reference materials and integrate them right into the minutes for easy access.

- **Supplementary resources**

To avoid cluttering the primary document, link to or mention extra non-essential resources, such as thorough reports or background information.



## Maintain file management

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- **Name conventions**

Create a clear and consistent name scheme for connected documents to make them easier to identify and retrieve.

- **Version control**

To avoid misunderstanding and protect document integrity, ensure version control for any embedded documents.



## Dynamic management

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- **Regular review**

Maintain a system for assessing associated papers and regularly eliminate old or unnecessary items to keep the minutes current and manageable.

- **Live links**

Consider incorporating live links instead of static snapshots for dynamic material such as project management dashboards or data reports to assure access to the most up-to-date information.



## 2. Instructions for presenters

Presenters play an important role in ensuring the quality and efficacy of meeting minutes. It's been estimated that a staggering 75% of all people have at least some fear of public speaking, so chances are, in any given presentation situation, a decent amount of presenters feel some level of anxiety.

Following these recommendations allows you to actively contribute to clear communication:

- **Prepare summaries**

Create concise overviews of essential topics and conclusions from your presentation, preferably using bullet-point outlines or brief paragraphs.

- **Review finalized minutes**

After the meeting, consider checking the finalized minutes to ensure your contributions are accurately reflected and to identify any required clarifications.

- **Share materials in advance**

When feasible, circulate pertinent slides or reports to the meeting facilitator and note-taker to facilitate a smooth absorption into the minutes.

- **Maintain a logical flow**

To make it easier to take notes, organize material in a sequence that corresponds to the meeting agenda.

- **Ensure consistent terminology**

To minimize misunderstanding, use consistent terminology throughout your presentation and resources.

- **Address clarifying requests**

Be ready to address any questions that arise from the note-taker during your presentation to guarantee accuracy.

- **Provide additional context**

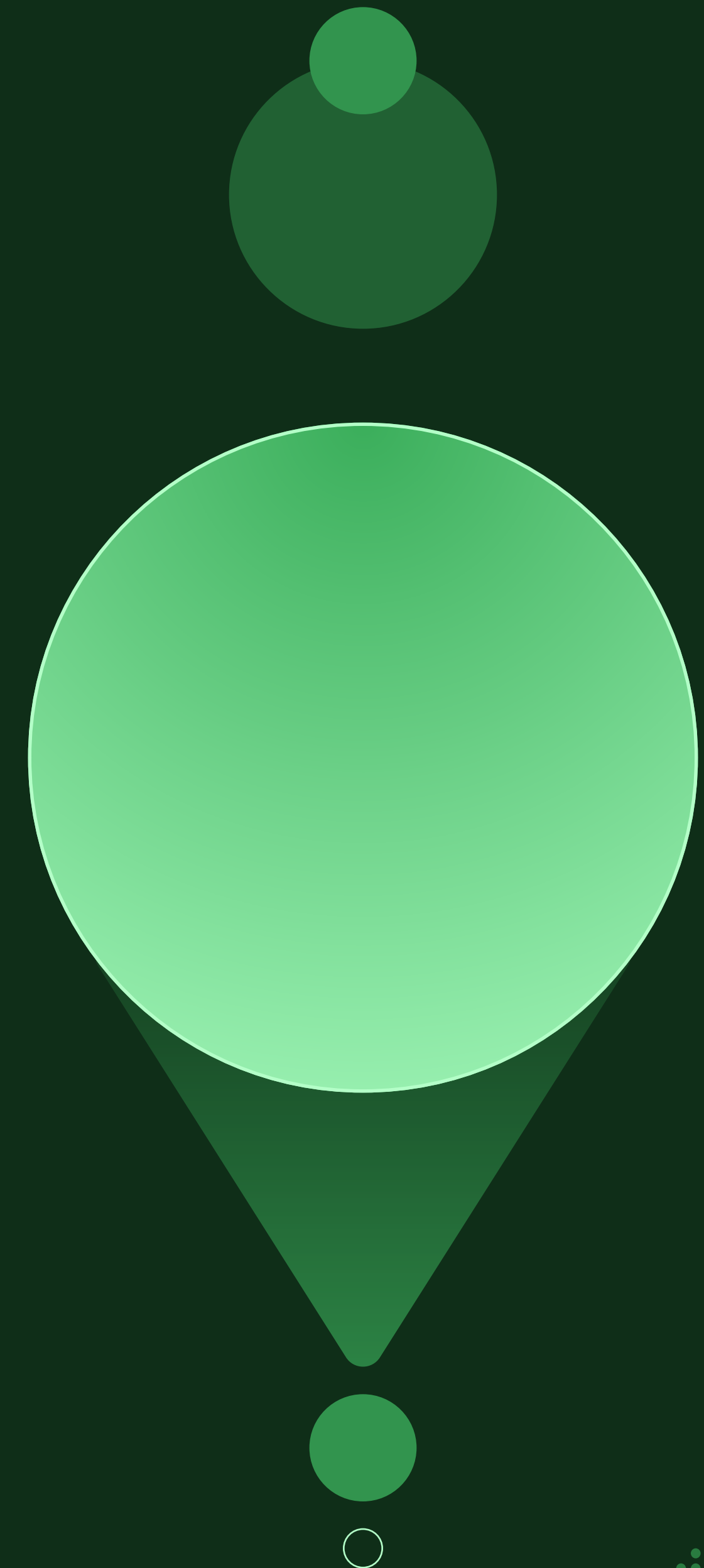
Include any relevant content not directly discussed in your presentation but useful for accurate minutes.

- **Use visuals**

Consider utilizing charts, graphs, or diagrams to help people understand and improve spoken information.

## 3. Clear meeting notes

Organizing lively discussions into brief and useful notes is at the heart of what makes good meeting minutes. This section explores practical recommendations for putting this crucial skill into your meeting minutes template. Also, this allows you to turn brief interactions into long-lasting records that boost productivity. We put first the following best practices:





## Prioritize and break down

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- **Determine key topics**

Concentrate your efforts on identifying the primary topics and pivotal decisions that arise from each discussion point. Avoid getting mired down in little details and instead focus on the big picture.

- **Paraphrase with precision**

Use brief and precise paraphrase strategies to convey the substance of crucial arguments and contributions.



## Optimize note-taking efficiency

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- **Active listening**

Prioritize active listening above verbatim transcription. Instead of recording every word said, concentrate on understanding each speaker's main points and arguments.

- **Post-meeting refinement**

Set some time after the meeting to examine and revise your notes. This helps you to fill in any gaps and reinforce essential themes.



## Structure for comprehension

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- **Thematic clustering**

Organize notes under appropriate subject headings or thematic clusters to help you comprehend the discussion flow more easily.

- **Distinguish speaker roles**

Identify the source of each contribution, using initials, titles, or color-coding.

# Key takeaways

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**01** Meetings are crucial for collaboration and decision-making, but their effectiveness often suffers due to inefficient practices.

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**04** A detailed meeting minutes template helps to capture key decisions, action items, and discussion topics.

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**02** Comprehensive and actionable meeting minutes are essential for productive meetings.

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**05** The meeting template includes sections for meeting details, attendees, agenda items, notes, and attachments.

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**03** Well-written minutes improve communication clarity, reduce confusion, and maximize meeting value.



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