

# The Minute Taker's Checklist

*Here are three detailed checklists to help in ensuring that all essential activities have been undertaken before, during and after the meeting.*



The Minute Taker's Checklist has been reproduced from *Effective Minute Taking* with permission from authors Rob Robson, Philip Davis and Archana Singh Karki (ICSA Publishing Ltd, 2012), [www.icsa.org.uk/shop/books/effective-minute-taking](http://www.icsa.org.uk/shop/books/effective-minute-taking)

The book provides practical guidelines for overcoming the problems faced by minute takers and achieving accuracy in the minute taking process, with checklists, further reading, useful contacts, and boxed sections highlighting hints, tips, and exercises. This book encourages you to take a proactive approach to minute taking, and allows you to sharpen your skills-sets and builds confidence to embrace new ideas.

## BEFORE THE MEETING

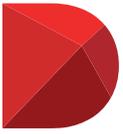
- Do I clearly understand the meeting cycle for this meeting?
- Have I created a timeline plan to show how this meeting cycle dovetails with those for the other meetings I attend?
- Am I expected to contribute at this meeting in addition to taking the minutes?
- If I am expected to contribute for one item only, have I made arrangements for someone else to take the minutes for that one item?
- If I am expected to be the minute taker and full meeting contributor, have I explained to everyone that the minutes will be more concise than usual with the emphasis on noting action points? Have I explained to the chairperson that a summary would be appreciated at the end of each item?
- Am I fully aware of the layout and style of the minutes required in respect of this meeting?
- Do I fully understand all the procedural matters in relation to this particular meeting?
- Have I confirmed all the necessary administration arrangements for the meeting?
- Have I checked that all equipment is in good working order?
- Has the meeting room been arranged in the way the participants have requested?
- Have I read thoroughly the minutes of the last meeting?
- Have I read and fully understood the agenda?
- Have I read and understood all the supporting papers?
- Is there any additional information that I need to read and understand in order to be fully prepared?
- Do I have access to all the necessary documents for the meeting, including the minutes of the last meeting?
- Is the chair required to sign the minutes? Do I have a copy for this purpose?
- With respect to this meeting, do I know who the chair is?
- If I have not worked with the chair before, what can I do to establish a professional relationship?
- Have I arranged a pre-meeting briefing session with the chair?
- Have I made arrangements to sit next to the chair at the meeting?
- If it is not possible to sit next to the chair, what arrangements can I make to ensure that the quality of my note-taking is not compromised?
- Have I created an attendance list for circulation at the meeting?
- Have I noted all the abbreviations, technical terms and jargon that may be used by participants at this meeting?
- Have I allocated time to undertake an initial review of my notes immediately following the meeting?
- Have I arranged to arrive a little earlier at the venue to check the final arrangements and converse with participants?
- If I need to interrupt for clarifications, have I practiced my voice projection and assertiveness techniques to enable me to do so with confidence?

## DURING THE MEETING

- Does my body language give evidence that I am a professional person with every right to be at the meeting, in order to fulfil an extremely important role?
- Have I taken the opportunity to mix and converse with participants in order to build rapport?
- Have I arranged my working space in a neat and orderly fashion?
- Have I spoken to the chairperson just prior to commencement to clarify any last minute points of concern?
- Has everyone seen and signed the attendance list?
- Do I have a complete and accurate record of all apologies?
- For each item, am I formulating in my mind an idea as to the main emphasis of the discussion and the possible decisions, from the chair's opening summary?
- Am I working with the chair to ensure that all participants who want to contribute are able to do so?
- Am I getting the sense of the message or am I focusing too much on the actual words?
- Am I isolating the key points from each speaker's contribution?
- Am I relating the key points to the central matter under discussion?
- Am I tending to record the arguments verbatim, or am I employing my personalised form of shorthand?
- Am I clearly extracting and recording all the decisions and action points?
- For the action points, have I made a note of who is responsible and the deadline date for completion?
- Where points are unclear, am I asking for appropriate clarifications?
- Am I maintaining concentration or is my mind beginning to wander?
- Am I tending to write sentences or am I mastering the use of bullet points and abbreviations?
- If a problem arises regarding understanding and it is inappropriate at that point to seek clarification, have I clearly highlighted this in my notes?
- Am I maintaining eye contact with the speaker in order to improve the quality of my listening or do I seldom look up from my notes?
- Am I being influenced or distracted by the voice tone of the speaker, the manner of delivery or the emotional nature of the contributions, or am I still focusing on the key points, actions and decisions?
- Although my notes will be structured to a greater degree during the writing up stage, am I trying to keep the key points to the fore in my note-taking?
- Am I intervening confidently and assertively when required or am I a little 'backward in coming forward'?
- Am I helping the chair to keep the meeting on track and, where necessary, to observe procedural conventions?
- When I am contributing to an item on the agenda, do I ask the chair to summarise the discussion in the interest of an accurate set of minutes?
- Am I listening effectively, remembering to employ the different forms of listening in order to create a rounded out understanding?
- Am I allowing anything to influence my listening in a negative sense, such as bias, prejudice, cynicism, indignation or vested interests?
- Have I clearly noted the time, date and place of the next meeting?
- Before the participants disperse, am I taking the opportunity to speak to anyone I need to in order to seek necessary clarifications?

## AFTER THE MEETING

- Have I taken the trouble to shake hands with and say goodbye to, all the participants?
- Have I taken the time, after everyone has left, to analyse my notes and check understanding?
- Have I made sure that all the key points are highlighted while my memory is still fresh?
- Have I thanked the chair?
- Have I discussed any pertinent points with the chair prior to leaving the meeting room?
- Have I asked the chair to sign the minutes of the previous meeting (if necessary) so that they can be filed and archived?
- Have I started writing up the draft minutes as soon as possible after the meeting?
- Am I using the correct format and style having regard to the nature of the meeting and the level of formality or informality required?
- Am I using an appropriate numbering system?
- Am I using the passive voice and correct verbs, particularly where the minutes are of a formal nature?
- Have I checked the level of detail required for this particular meeting? Is the recording of decisions and actions enough or do I need to incorporate the 'flavour' of the discussion?
- When summarising the discussions, am I being crisp and concise, perhaps consolidating certain discussion points into one sentence or is the minute tending to be too drawn out and 'wordy'?
- Have I carefully proofread the minutes before sending them to the chair for approval?
- I am aware that the draft minutes need to be returned on time to adhere to the meeting cycle, but have I given the chair a clear deadline for their approval?
- When sending the minutes have I clearly highlighted the action points for the individual participants?
- Which background papers do I need to file with the minutes?
- From my perspective as minute taker, what went well at the meeting and what areas need to be worked on?
- What exercises can I undertake to practice my listening and note-taking skills?
- At the next meeting, what can I personally do to make it even more effective?



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