



MEETING MINUTE CHECKLIST

- ☐ Know the purpose
 - o They are an historical record of a group's decisions and actions
 - o They are a reminder of who was given assignments
 - o They are evidence of deadlines
 - o They are a benefit for people who are absent when decisions are made
- ☐ Learn to focus on major issues, actions, and decisions. Avoid irrelevant comments that have nothing to do with the discussion by the group.
- ☐ Just the facts. By contrast, opinions are personal views that are subjective and easily disputed by others.
- ☐ When one party commits to completing an item, make sure the deadline for that item is finalized and entered in the minutes.
- ☐ Edit to ensure brevity and clarity, so the minutes are easy to read.
- ☐ Be objective.
- ☐ Write in the same tense throughout
- ☐ Avoid using people's names, but rather the party they represent. This is a business document, not about who said what.
- ☐ Avoid inflammatory or personal observations. The fewer adjectives or adverbs you use, the better.
- ☐ Proofread and spell check everything. These are a reflection on you, take pride in them. "What's worth doing is worth doing well."
- ☐ Allow time for your PM to review the minutes to make sure you both are on the same page.
- ☐ Enter and distribute the minutes within 72 hours of the meeting occurrence. This also gives time to the attendees to review the minutes and be reminded of their action items.