Meeting Notes Template

Keep a record of important discussions



Meeting notes help with communication across the project. They ensure that the project stakeholders have a common understanding of what a past meeting was about and decisions that were made, as well as an outline of any next steps or action items. The notes serve as the permanent record of the discussion and the decisions made in the meeting. Meeting notes are an especially useful record for those who were not able to attend the meeting in person.

## Instructions

1. Refine the template to suit your needs.
2. Record the meeting participants and document who attended.
3. Start the meeting with a review of the action items from previous meetings. Record the updated status in the table.
4. Record key decisions and takeaways from the meeting discussions.
5. Document new action items and add those action items to the agenda for the next meeting for an update on the progress.
6. Utilize the notes section to summarize discussions.
7. Set the next meeting date and time.

## Helpful hints

* Transfer risks, issues, actions, and decisions to a **RAID Log** to maintain a central repository of this information. The RAID log facilitates quick access to information about outstanding actions and issues and past decisions.
* **Bolded text** (as used above) indicates that the resource referenced is available elsewhere in the IIS Migration Toolkit.
* Boxes marked “note to author” (indicated with a lightbulb icon) are intended to serve as guidance as you move through the template, and should be deleted as you work.
* Utilize this template while in the meeting if feasible. It is often difficult to transcribe meeting minutes after the meeting has happened.
* Follow a structured agenda, and consider including the agenda in the meeting minutes as part of the notes section.
* Meeting notes should be distributed to the meeting participants, including those who were unable to attend in person. Distribution should occur in a timely manner, typically within 3-5 business days.

# <Meeting> notes

## Meeting information

|  |  |
| --- | --- |
| **Objective(s)** |  |
| **Date, time** |  |
| **Location** |  |
| **Facilitator** |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Participants** | **Affiliation/organization** | **Role** | **Present?** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## Action item review

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Action item** | **Person responsible** | **Due date** | **Status** |
|  |  |  |  |  |
| 1. |  |  |  |  |
| 2. |  |  |  |  |
| 3. |  |  |  |  |

|  |  |
| --- | --- |
|  | **Note to author**: The “Action item review” section is useful for reviewing action items from previous meetings in order to record the progress update. |

## Key decisions/takeaways

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 1. |  |  |  |  |
| 2. |  |  |  |  |
| 3. |  |  |  |  |

|  |  |
| --- | --- |
|  | **Note to author**: Consider recording or transferring critical decisions and issues to a risks, actions, issues, decisions log (**RAID Log**). However, some decisions and takeaways may be sufficiently documented in this template. |

## New action items

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Action item** | **Person responsible** | **Due date** | **Status** |
|  |  |  |  |  |
| 1. |  |  |  |  |
| 2. |  |  |  |  |
| 3. |  |  |  |  |

|  |  |
| --- | --- |
|  | **Note to author**: If you are using the **RAID Log**, record critical action items in the log as well as in the “new action items” table above. However, some action items may be sufficiently documented in this template. |

## Notes

|  |  |
| --- | --- |
|  | **Note to author**: Use the agenda topics as a guide for recording notes. These notes should aim to summarize the rationale for decisions made and the next steps as opposed to providing a verbatim account of the discussion. Bullet points are strongly suggested. |

## Next meeting

<Date and time of next meeting.>