



TAKING MEETING **Minutes**



Objective:

To effectively capture the key takeaways and action items during meetings and distribute them to attendees.

Scope:

This SOP applies to all meetings attended by the executive assistant. Equipment/Tools Needed: Laptop, note-taking software (e.g., Microsoft OneNote, Evernote), audio recorder (optional).

Steps:

- 1** Before the meeting, obtain the meeting agenda, attendee list, and any relevant materials.
- 2** Review the agenda and materials to gain an understanding of the meeting's purpose and Objectives.
- 3** Arrive early and set up your note-taking software or paper and pen.
- 4** During the meeting, actively listen and take notes on key points, decisions made, and action items assigned to attendees. Use shorthand and bullet points to capture information quickly.
- 5** Record the time and the speaker's name when taking notes for reference later.
- 6** If a decision is made, record the decision and the reason behind it.
- 7** If an action item is assigned to a specific person, record their name, the task, and the Deadline.

- 8** If an action item is not assigned to anyone, clarify who will be responsible for completing the task and record their name.
- 9** After the meeting, review and organize your notes. Create a summary of the meeting that includes the key takeaways, decisions made, and action items assigned.
- 1** Distribute the meeting minutes to all attendees as soon as possible after the meeting.
- 1** Include the summary of the meeting, key points, decisions made, and action items assigned.
- 1** Save a copy of the meeting minutes and related materials to the appropriate project file or folder.

Style of Writing:

Use clear and concise language with bulleted or numbered lists to present the steps.

Samples

Sample Meeting Minutes Summary:

Meeting Title: *Marketing Strategy Meeting*

Date: *02/20/2023*

Time: *10:00 AM – 11:00 AM*

Location: *Zoom Conference Call*

Attendees:

John Smith, Marketing Director

Jane Doe, Social Media Manager

Joe Johnson, Content Creator

Sarah Lee, Executive Assistant

Key Takeaways:

The team reviewed the results of the latest marketing campaign and discussed the next steps for the upcoming campaign.

It was decided to focus on Instagram as the primary platform for the next campaign.

The team agreed to use user-generated content in the upcoming campaign.

The budget for the next campaign was set at \$50,000.

Action Items:

John Smith to provide a detailed campaign plan by 02/27/2023.

Jane Doe to research and compile user-generated content by 03/06/2023.

Joe Johnson to create new graphics and design elements for the campaign by 03/13/2023.

Sample Meeting Minutes Template:

Meeting Title:

Date:

Time:

Location:

Attendees:

[Name]

[Name]

[Name]

[Name]

Agenda:

[Agenda Item 1]

[Agenda Item 2]

[Agenda Item 3]

[Agenda Item 4]

Discussion:

[Discussion Point 1]

[Discussion Point 2]

[Discussion Point 3]

[Discussion Point 4]

Decisions:

[Decision 1]

[Decision 2]

[Decision 3]

[Decision 4]

Action Items:

[Name], [Task], [Deadline]

[Name], [Task], [Deadline]

[Name], [Task], [Deadline]

**SCAN
CALENDAR**



BOOK A STRATEGY CALL

Jeff J Hunter

*Founder VA Staffer
Pre-Trained, Pre-Vetted Executive
Assistants*

