

Writing for Impact

Template 3

Notes and minutes

1. Last mtg: all actions comp'd
2. RH: Cust. complaint – BG Bearings (big contract). Late delivery (again – also last Sept.). No info from CS for 2 days. No apology. V. angry. May end contract.

Action plan:

- GL to phone cust. asap
- BA to inv. reason 4 late delivery
- RH to inv. who in CS dealt with complaint, why no response
- Follow up nxt mtg

3. GL: Visit from HQ confirmed 18 – 22 March. M Bryant (CFO) & H Thomas (?)
Problem: why are they coming? No info.

Action plan:

- GL to co-ord. agenda (mtgs, site tour, etc.). Circ. email by Mon 11.
- SP to manage itinerary (hotels, taxi, meals, etc.)

Use abbreviations like *mtg* (meeting), *mgr* (manager), *info* (information), *cust* (customer), *inv.* (investigate) and *v.* (very). Just make sure you can remember what each of your abbreviations means!

Make a note of who led each discussion and who made important points.

Don't write full sentences, just the key words for each fact.

Use *to*-infinitives for most action points, and make sure you mention who is responsible for each.

You can use numbers (e.g. 4 = for) and symbols (e.g. & = and, @ = at) but it's often quicker to write the full words.

Don't forget, you can check details later, when you write up your notes.

You can use past participles as a short form of the passive in both notes (e.g. ~~the visit~~ *has been confirmed*) and minutes (e.g. *all actions have been completed*).

Use lots of reporting verbs. You can use past simple for things that people said at the meeting and present simple or present perfect to report things said outside the meeting (e.g. *they claim* / *they have claimed that ...*).

There are some techniques for making minutes more official, like using *all* instead of *everybody*, and *to*-infinitives for future plans.

Give each item a clear title and a number.

Minutes of Management Team – 4 March

Present: Graham Lewis (Chair) Ruth Hunt Boris Adams

Minutes: Susan Patterson (PA to Chair)

1 Review minutes of previous meeting

All actions completed

2 Complaint from BG Bearings

Ruth reported a serious complaint received from BG Bearings, concerning a late delivery in February. They claim they received no information for two days, and are still waiting for an apology. They say there was a similar problem last September. They are extremely angry, and threaten to terminate the contract.

Ruth asked Graham to phone their CEO immediately to apologise.

Boris volunteered to investigate the cause of the late delivery.

Ruth will investigate what went wrong in Customer Services.

All to report back at next week's meeting to plan next steps.

3 Visit from Headquarters

Graham confirmed that two senior executives, Malcolm Bryant (Chief Financial Officer) and Hannah Thomas (Marketing Director) will visit between 18th and 22nd March. General concern that no information has been provided regarding the purpose of the visit.

Graham agreed to find out more information and to co-ordinate and circulate an agenda by Monday 11th March.

Susan will oversee the itinerary.