

# Notes Template

**Name of Company**

Meeting Name

Date Goes Here

Notes

Attendees at meeting: name, name, name, name, name, etc....

## 1. Items Assigned (tasks)

- a. Topic name - write max 1 line of assigned task here. No more than 1 line.....Name here
- b. Topic name - write max 1 line of assigned task here. No more than 1 line.....Name here
- c. Topic name - write max 1 line of assigned task here. No more than 1 line.....Name here
- d. Topic name - write max 1 line of assigned task here. No more than 1 line.....Name here
- e. Topic name - write max 1 line of assigned task here. No more than 1 line.....Name here

## 2. Items Decided

- a. Topic name - this is where you write a 1-2 line decision of the items that were decided in the meeting. Don't go over 2 lines. But if you have to, you can enter bullets as needed:
  - i. Here you can write a 1-line sub-point to give more clarity of what was decided
  - ii. Here you can write a 1-line sub-point to give more clarity of what was decided
  - iii. Here you can write a 1-line sub-point to give more clarity of what was decided

## 3. Items Discussed

- a. Topic name - here you enter a 1-line and short description of what was discussed
- b. Topic name - here you enter a 1-line and short description of what was discussed
- c. Topic name - here you enter a 1-line and short description of what was discussed
- d. Topic name - here you enter a 1-line and short description of what was discussed

## 4. Top Projects

- a. Item 1 of top projects we are tracking to make sure they hit upcoming agendas
- b. Item 2 of top projects we are tracking to make sure they hit upcoming agendas
- c. Item 3 of top projects we are tracking to make sure they hit upcoming agendas
- d. Item 4 of top projects we are tracking to make sure they hit upcoming agendas
- e. Item 5 of top projects we are tracking to make sure they hit upcoming agendas
- f. Item 6 of top projects we are tracking to make sure they hit upcoming agendas

# Notes (sample)

## STANFORD PETROLEUM, INC

Executive | Managers Meeting

June 1, 2018

### Notes

#### 1. Items Assigned (tasks)

- a. Invoicing - make sure the 6/30 & 8/11 invoices were turned in.....Randy
- b. Onboarding
  - i. Send out written assignment to team to get started.....Don
  - ii. Request that accounting have ready the initial steps.....Don
  - iii. Update the "Onboarding New Employee" Process to the team.....Don
- c. Staff meeting - the team will continue meeting to define meeting.....Jean
- d. Funding- get with director to review timelines/requirements for preparation.....Randi
- e. Dep't meetings w/ Exec Director - Dianne is reviewing the google folders/files.....Don
- f. Volunteers - talking w/ hospital to define program.....Randi
- g. Manager meeting - send invites to managers mtg (last Wed of month).....Victoria

#### 2. Items Decided

- a. On-Boarding Team (sub-team of the "Staff Development Team" initiative)
  - i. Leader: John
  - ii. Members: John, Paul, George, Ringo, Peter, Paul and Mary
  - iii. Resources: Laurel, Hardy, Lewis
  - iv. Other team members in the Staff Dev Team: Frank, Dean, Ellen
  - v. Assignments/Deliverables:
    - 1. Steps
    - 2. Timeline
    - 3. Responsibility
  - vi. We will do a dry-run this coming Monday for the 3 new hires. Don drives this.
- b. Quarterly Staff Meetings
  - i. John presented draft agenda, edited it, and approved it.
  - ii. This team is the permanent team to plan out all staff meetings so everyone can get ahead
- c. Finance Director: hold hiring this position; no other action for now (revisit in 2 months)
- d. Recruitment of Sales Manager: Denise starts tomorrow (8/17)
- e. Rhythm of teams – Don will start bringing items from the Red team to this meeting

#### 3. Items Discussed

- a. How efficient are these meetings. No decisions made. Good discussion.
- b. The sample of the gift packet for this quarter top performing team members. All progressing well.

#### 4. Top Projects for next week's meeting:

- a. Blood Drive
- b. Global Sales campaign
- c. Invoicing cycles
- d. Don's assistant recruitment
- e. Employee handbook
- f. Digital footprint and web site project