
— MEETINGS / MINUTES

The Minute Taking Template

Three meetings written out in full, the empty version of each one, and the table that says how much detail the document owes the person who opens it next.

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PICK A DEPTH IN 30 SECONDS

Find your meeting in the depth table on the last page and read the two right-hand columns before you write a word. Board and committee: motions, tallies, abstentions, no debate. Stand-up: blocked, changed, decided, and nothing else. Client call: the ask in their words, both sets of commitments, and what was not approved. Circulate the draft the same day.

The board meeting, filled in

Illustrative. Harbor Line Coffee Roasters is a composite, not a real company, and no person named here exists.

HARBOR LINE COFFEE ROASTERS, INC.
Minutes of the regular meeting of the
Board of Directors
14 July 2026, 09:00 to 10:12 · video

Present: D. Alvarez (Chair), M. Okonjo,
S. Petrov, R. Lin, J. Haddad

Absent: T. Vance, notice given

Also present: A. Ferreira (Secretary);
K. Doyle (CFO), item 3 only

Quorum: present throughout

1. Call to order

The Chair called the meeting to
order at 09:00.

2. Minutes of the previous meeting

The minutes of 9 June 2026 were
approved as corrected: in item 4,
"eighteen months" replaced
"twelve months".

3. Q2 financial statements

The CFO presented the Q2 statements.
Motion: to approve the Q2 financial
statements as presented. Moved by
M. Okonjo, seconded by R. Lin.
Carried, 4 in favour, 0 against,
1 abstention (S. Petrov, citing a
supplier relationship with the
audit firm).

4. Dock Road lease

Motion: to authorise the CEO to sign
a five-year lease at 22 Dock Road at
a rent not exceeding \$18,500 per
month. Moved by R. Lin, seconded by
J. Haddad. Carried unanimously.
Action: A. Ferreira to file the
executed lease with the corporate
records by 31 July 2026.

5. Any other business

None.

6. Adjournment

The Chair adjourned at 10:12.

Minutes taken by A. Ferreira, Secretary.
Draft circulated 15 July 2026.

No discussion appears anywhere above. The official Robert's Rules FAQ is blunt about it: minutes record what was done at a meeting, not what was said. The four lines nobody can rebuild from memory are the absences, the quorum, the tally and the reason for the abstention.

Board minutes, empty

{ORGANISATION}

Minutes of the {regular / special /
annual} meeting of the {body}
{date}, {start} to {end} · {where}

Present: {names, chair first}

Absent: {names, notice given or not}

Also present: {non-members, and for
which items}

Quorum: {held throughout / lost at N}

1. Call to order

{who opened, at what time}

2. Minutes of the previous meeting

{approved as read, or as corrected
plus the correction itself}

3. {item}

Motion: {the wording voted on, not
a paraphrase}

Moved by {name}, seconded by {name}.

{Carried / Failed}, {tally}.

{Abstention and its stated reason}

Action: {owner} to {act} by {date}

{N}. Any other business

{items, or None}

{N}. Adjournment

{who closed, at what time}

Minutes taken by {name}, {role}.

Draft circulated {date}.

The stand-up, filled in and empty

The 2020 Scrum Guide gives the Daily Scrum 15 minutes and prescribes no documentation at all. Most days the right answer is no document. On the days something moved, write this much, for the person who was on a plane.

Payments squad · daily stand-up
14 Jul 2026, 09:32 to 09:44

Blocked

Card tokenisation waiting on the vendor sandbox key. Owner: Priya. Chased twice this week; escalating to the account manager if nothing lands by Wednesday.

Changed since yesterday

Refund flow moved to staging, so the Friday release is now Thursday.

Decided standing up

Currency rounding bug ships as a hotfix instead of waiting for the next sprint. Dan and Priya, no dissent.

Not recorded: everything else.

{squad} · daily stand-up
{date}, {start} to {end}

Blocked

{what is stuck, on whom or what}.
Owner: {name}. {what was tried; the trigger for escalating}

Changed since yesterday

{the fact a returning teammate would otherwise get wrong}

Decided standing up

{the call made without a meeting, and who made it}

Not recorded: everything else.

“Not recorded: everything else” is a policy, not a joke. It tells the next reader that silence means nothing happened, which is what makes a three-line document trustworthy instead of lazy.

The client call, filled in

Illustrative. Vellum Studio and Rowan Dental Group are invented, and so is everything they say here.

Vellum Studio · Rowan Dental Group
project review call

14 Jul 2026, 15:00 to 15:38 · Meet

Vellum: J. Mbeki (account),

L. Ferrand (design)

Rowan: C. Whitlock (marketing),

H. Ostrom (operations)

What the client asked for

C. Whitlock: patients should be able to reschedule in the booking flow without phoning the desk. Named it the priority for the September campaign, and wanted the homepage live first, "or the ads point at the old one".

What we said we would do

L. Ferrand to send two reschedule flows by 18 July.

J. Mbeki to price them as a change request, because the signed scope covers booking only. Said so on the call; C. Whitlock agreed.

What we ruled out

Patient records integration stays out of this phase. H. Ostrom accepted and asked for it to be scoped separately in the autumn.

Where the money moved

Change request estimated at 12 to 16 hours, quote due 18 July. Nothing was approved on this call.

What is at risk

The campaign date is fixed and the homepage waits on copy Rowan still owes. Raised on the call; C. Whitlock to send copy by 25 July.

The client call, empty

{your company} · {client}
{call type}
{date}, {start} to {end} · {platform}
{your side}: {names, roles}
{client side}: {names, roles}

What the client asked for
{name}: {the ask, in their own words
where the words carry weight}

What we said we would do
{owner} to {deliverable} by {date}

What we ruled out
{the exclusion, and who accepted it}

Where the money moved
{change request, estimate, quote
date, what stayed unapproved}

What is at risk
{the dependency, who owns it, when}

Send it as the recap email the same day, in these words. Once the client has read it without objecting, it stops being your notes and starts being the record.

How much detail each one owes

The meeting	Who opens it later	Keep	Cut first
Board or committee	An absent director, an auditor, a lawyer, occasionally a court	Motions in their voted wording, tallies, abstentions with reasons	The debate
Daily stand-up	The teammate who was on a plane	Blockers, what changed, decisions taken standing up	Anything equally true yesterday
Client or agency call	The client, your finance colleague, whoever inherits the account	The ask in their words, both sets of commitments, the money not approved	Your private opinion of the client
Interview or 1:1	The two people in the room, nobody else by default	Evidence, and what was agreed	Impressions with no example under them

Four lines that create a liability

Verbatim quotes in board minutes. A sentence said while somebody was changing their mind reads, three years on, like a position they held all along. The recording holds the argument in context; the approved document holds the decision.

Letting “discussed” do the work of a verb. “The board discussed the lease at length” records that time passed. “Motion to sign five years, ceiling \$18,500 monthly, carried unanimously” records that a company just committed a million dollars.

An action with no owner or no date. “Team to review pricing” is a wish. Every action line in these samples carries a name and a day.

Adjectives about people. “H. was defensive about the timeline” is an assessment, and it will be read by someone you did not expect. Write the observable thing; the timeline was raised twice and no date was given.

Run this sheet as a Lens in talk2bud and the document arrives already shaped: the call is captured from your Mac’s system audio with no bot joining the meeting, and the analysis comes back as decisions, owners and due dates for you to cut down. Capturing without a bot is not capturing in secret, so telling the room stays part of the flow.

Sources, read 13 August 2026

- Robert’s Rules of Order, official FAQ Q15 and Q16 · robertsrules.com/frequently-asked-questions
- California Corporations Code section 1500 · leginfo.legislature.ca.gov
- The 2020 Scrum Guide, November 2020 · scrumguides.org/scrum-guide.html
- Google Meet Help, “Take notes for me” · support.google.com/meet/answer/14754931
- Google, “Take notes for me” for AI Pro and Ultra, 29 June 2026 · blog.google



Stop filling this in by hand. talk2bud sits on the call and writes the summary, the decisions, and the next steps with owners.
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