



TEMPLATE

FREE

THE MEETING NOTES AND DECISIONS LOG

The exact format I use with every client, so nothing agreed gets lost.

01

THE SYSTEM, TWO PARTS

Meetings produce two things worth keeping: what was decided, and who is doing what by when. Everything else is atmosphere. This system captures both with a note block per meeting and one running log that outlives every meeting.

The failure mode it prevents: three weeks later, two people with different memories of the same call and no record to settle it.

One per meeting. Newest at the top of the file.

COPY THIS

YOURS TO KEEP

****MEETING:**** [Client or project] — [topic]

****Date:**** [date] ****Type:**** [kickoff / review / working session / call]

****Attendees:**** [names]

****SUMMARY****

[Three to six lines. If an AI transcription produced a summary, paste it here after reviewing it, and review anything about money, scope, or commitments word by word.]

****DECISIONS MADE****

- [decision, stated as a decision: "We will X", not "We discussed X"]

****ACTION ITEMS****

- [action] — owner: [name] — due: [date]

****LINKS****

- [the relevant document or deliverable]

One table per client or project, running for the life of the engagement.

DATE	DECISION OR ACTION	OWNER	DUE	STATUS
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Status values: Open / Done / Dropped. Dropped is a real status, things get overtaken, and recording that beats letting them haunt the list.

1

Write actions during the meeting, not after. Post-meeting reconstruction is where owners and dates evaporate.

2

An action without an owner and a date is a wish. Do not write wishes in the actions section.

3

Copy every action from the note block into the log the same day. The block is the record of the meeting, the log is the record of the engagement.

4

Read the log before every meeting. Two minutes. It is the difference between "where did we get to" and starting where you finished.

5

One decision per line, stated as a decision. "We will move the launch to October" can be checked later. "Launch timing was discussed" cannot.



If you would rather have this done **with** you
than **to** you, this is the work I do.

START A CONVERSATION

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