Job Aid: Running Effective Meetings Using Microsoft Teams and OneNote

Step-by-Step Guide for Organizing, Conducting, and Documenting Meetings

Before the Meeting

1. Define Meeting Objectives and Agenda

- Clearly articulate the purpose of the meeting (update, decision-making, brainstorming, etc.).
- Draft a focused agenda outlining the topics to be discussed, expected outcomes, timing, and presenters.
- Assign roles if needed (facilitator, note-taker, timekeeper).

2. Schedule the Meeting in Microsoft Teams

- Open Microsoft Teams and go to the Calendar tab.
- Click New Meeting and fill in the meeting details:
- Title of the meeting
- Attendees' email addresses
- Date and time
- Location (select "Teams Meeting" for an online option)
- Paste the agenda and objectives into the meeting invitation body

Attach related files or pre-read materials as needed.

Send the invitation and monitor for responses.

3. Prepare the OneNote Notebook

- Open OneNote and create a new notebook or select an existing one for ongoing meetings.
- Create a section for your meeting or a section for all meetings related to a particular project or team.
- Add a page for the upcoming meeting:
- Title the page with the meeting name and date.
- Copy and paste the agenda and objectives.

- Optionally, include a table for attendee names and roles.

If your organization uses shared notebooks, make sure all relevant participants have access.

4. Link OneNote to Your Teams Meeting

- In Microsoft Teams, open the scheduled meeting from the Calendar.
- Click Meeting Notes at the top, then choose Take notes in OneNote.
- Select the appropriate notebook and page for your meeting.
- Now, all meeting participants can view or edit meeting notes.

During the Meeting

1. Start the Meeting in Microsoft Teams

- At the scheduled time, open the meeting invite and click Join.
- Set up your audio and video preferences (mute/unmute, camera on/off).
- Welcome participants and review the agenda and objectives.

2. Share Your Screen or Content

- Click the Share button in the Teams meeting controls to display the agenda, a presentation, or other relevant documents.
- Share the OneNote page to keep everyone aligned and on track.

3. Facilitate Discussion and Engagement

- Encourage participation by inviting input from all attendees.
- Keep an eye on the meeting chat for questions or comments.
- Use Teams features like Raise Hand, Reactions, and Polls to manage engagement and gather feedback.

4. Document Key Points and Decisions in OneNote

- Designate a note-taker, or allow all participants to add to the shared notes page.
- Record decisions, assigned action items, deadlines, and outstanding questions.
- Tag important items with OneNote's built-in tags (e.g., To Do, Important, Question).
- Use checklists or tables to track tasks and responsibilities.

5. Record the Meeting (If Appropriate)

- With all participants' consent, click More Actions (three dots) > Start recording.

- The recording will be stored in Microsoft Stream or OneDrive/SharePoint, accessible via Teams.
- Add a link to the recording in your OneNote meeting page for future reference.

After the Meeting

1. Finalize and Distribute Meeting Notes

- Review and clean up the notes in OneNote, organizing them by:
- Agenda topics covered
- Decisions made
- Action items with assigned owners and due dates

Share the final OneNote page link with all meeting participants via Teams chat or email.

Save the OneNote page in the relevant notebook section for future reference.

2. Follow Up on Action Items

- Use OneNote's To Do tag or create a table to track action items.
- Assign and communicate responsibilities clearly.
- Regularly review action items in future meetings and update their status.
- Use Microsoft Teams Tasks or Planner to formalize and monitor ongoing tasks.

3. Archive Meeting Artifacts

- Store meeting materials (presentations, recordings, notes) in a shared Teams channel or SharePoint site.
- Ensure naming conventions and folder structures are consistent for easy retrieval.
- Link all related notes and files in OneNote for a centralized reference.

Best Practices and Tips

- Integrate Teams and OneNote: Add OneNote as a tab in your Teams channel for quick access and collaborative notetaking.
- Prepare Templates: Create OneNote templates for recurring meetings—include sections for agenda, attendees, decisions, and action items.
- Use Tags Effectively: Employ OneNote tags to highlight tasks, questions, and follow-up needs for clarity and accountability.

- Promote Collaboration: Encourage team members to add notes, comments, or resources before, during, and after meetings.
- Maintain Confidentiality: Set permissions on both Teams meetings and OneNote notebooks to protect sensitive information.
- Accessibility: Ensure shared OneNote content is accessible to all participants, including those with different devices or accessibility needs.
- Stay Organized: Use descriptive titles and consistent dating conventions for all meeting notes and calendar events.