Business Writing

Advanced

Session 8: Following Up on a Meeting
Learning Objectives

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In this session, you will:

• Learn about the purpose and components of an email to follow up on a meeting
• Practice using parallel structure.
Let’s Get Started

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The coach and the learner role play co-workers Daisy and Nelson as they talk about writing a follow-up email after a meeting.

Daisy: Hey, Nelson. How was your meeting with Olga?
Nelson: It was fine. We covered a lot of ground, so I hope I can remember everything.
Daisy: Did you take notes?
Nelson: Only a few, I’m afraid.
Daisy: Well, what I would do is, sit down right now and write her a follow-up email while it’s all fresh in your mind.
Nelson: You mean, to sum up what we talked about?
Daisy: Right. Especially anything that you agreed to do, or that you believe she agreed to do.
Nelson: Good point. We don’t want any confusion about that! Oh, and I’m supposed to share some of this info with you, Martin, and Naya, so I’ll just cc you all.
Daisy: Well, you could do that . . . or you could wait, and use your email to follow up just with Olga. After you hear back from her, and she confirms everything, then take that next step, and share the info with the rest of us.
Nelson: You’re right, I should wait. Thank you.
Following Up on a Meeting

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In *formal* meetings, there is likely to be someone taking minutes. The minutes of a meeting are an official record of that meeting. In a less formal or informal meetings, when no one is taking minutes, how will everyone remember what was decided and who is going to do what? That’s the purpose of a follow-up email.

After a meeting, send an email to:

- Summarize the discussion and decisions
- Remind people about responsibilities
- Avoid misunderstandings
- Create a written record
Ways to Confirm Your Understanding

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A follow-up email can help clear up any misunderstandings—if you are unsure about some part of the meeting, ask for confirmation of your understanding of what was said.

| State Your Understanding | As I understand it, ...  
If I understood correctly, ...  
Could you confirm something for me? I believe (that) ...  
... Just to confirm ... |
|--------------------------|--------------------------------------------------|
| Ask if it’s correct      | Is that correct?  
Do I have that right?     |
Let’s Practice

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Complete the following sentences with expressions you learned to use when confirming your understanding. Refer to the table on the previous slide if you need to.

1. Hi Dan, I’m drafting a follow-up email to send to everyone who was at the meeting. Just __________, we agreed our next meeting will be in two weeks—right?

2. Hi Jessica, There’s something I’d like to confirm with you. If I __________, we are not going to change vendors at this time. Please correct me if I’m wrong.

3. Pablo, could you __________ for me? At today’s meeting, you volunteered to draft the proposal we discussed, didn’t you?

4. Hi Samantha, As I recall, you were taking notes at today’s meeting. Is __________?

5. Brendan, you’re the one who’s going to contact Pavel with our questions about the data. Do I __________?
Let’s Practice

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When you **summarize** what happened in a meeting, keep your summary short. Include only the decisions that were made, and the things that people agreed to do. Organize your summary to make it easy to read. Chronological order (listing the decisions in the order in which they were made) and order of importance (listing the decisions from most important to least important) are two good ways of organizing a summary.

Read the following excerpt from an email. Is it organized chronologically or by order of importance? How can you tell?

I’d like to sum up our discussion. We talked about:

1. First, absenteeism. We have an increasing rate of employees missing work at the South End plant. I’m not sure how long this has been a problem. You and I decided that interviewing people who work at the plant could help us understand what’s going on.

2. We then discussed how hard it’s become to hire qualified employees for that plant. We agreed that the plant is understaffed. This is a critical issue. It is affecting production.

3. Finally, we agreed Roberto should hear about these problems.
Hi everyone,

Thanks for a good meeting today. To recap what we discussed:

1. Charlie’s unexpected absence
   • We agreed that Charlie’s team will report to Louise.
   • Louise will cover Charlie’s scheduled client presentations.
   • Mike will work with Louise to review Charlie’s presentation slides.

Bob, you’re going to write an article for the company newsletter in place of Charlie’s usual column—is that correct?

(continued)
2. Training group report
   • The changes to the Corporate Education area are in progress.
   • The first staff training in the new area will be in 2 weeks.
   • Some of the new equipment has not yet arrived. Nikki will contact the supplier to check its status.

3. Hiring plans
   • All unit managers have submitted their reports.

Everyone, please remember to read those reports in preparation for discussion at our next meeting—Friday the 12th, same time. Check with me if you have any questions about your tasks.

Best,
Jan
Apply It!

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Answer the questions based on Jan’s follow up email.

[1] In section 1, what is the purpose of the note to Bob?
   a. to tell Bob what he missed during the meeting
   b. to remind everyone of what Bob agreed to do
   c. to ask Bob for confirmation

[2] In section 2, what is the purpose of the sentence that mentions Nikki?
   a. to ask Nikki for confirmation
   b. to describe what Nikki agreed to do
   c. to inform Nikki about what to do

[3] What does Jan mention in the wrap-up section of the email?
   a. a topic for the next meeting
   b. thanks for a good meeting
   c. the location of the next meeting