

Note taking in Meetings

What's the best way to record discussion in a meeting to help you write up the formal minutes afterwards?



Most of us are required to attend many meetings on a regular basis, and it can often be difficult to remember the details of individual discussions. For a governance professional or company secretary, however, it is part of their job to write and review the meeting minutes and therefore full and accurate recall is very important!

There are several different ways of recording what is discussed in meetings to help with drafting of the formal minutes afterwards, each method with its advantages and disadvantages.

With the advancement of technology, it would seem that the simplest and most convenient option would be to electronically record the full meeting (via audio or video), particularly for any meeting with a large number of attendees. Minutes can easily be typed up in line with the recording, or a software solution could even be used to transcribe the minutes. Whilst this would forego the need to take notes and even the requirement for a minute-taker to attend, meeting participants often do not feel comfortable with their full discussion being recorded and this could stifle useful debate. Recording meetings also introduces risks around control of dissemination and destruction of the recording once the final minutes, which for a board meeting are the legal record of proceedings, are approved. In the event of subsequent legal or regulatory action, could the existence of a full recording be unhelpful given the informal nature of some meeting debates? It is perhaps no surprise therefore that, despite some obvious

convenience factors, in a recent poll undertaken by us on LinkedIn, the option to record meetings was preferred by only 5% of the respondents.

29% of respondents to the survey instead indicated that they opt to type up notes during the meeting. Many respondents considered this method to be more time-efficient, particularly those with good touch-typing skills, although others highlighted that typing could end up being rather noisy and a distraction to other attendees. As a more substantive issue, when typing up informal notes during a meeting, a minute-taker should consider how and when they will destroy those notes once the final formal minutes have been approved.

The most popular method, with a majority of 66%, was to record the proceedings using the traditional method of pen and paper. The purpose of minutes is to concisely summarise discussions, with the primary focus being on capturing outcomes or commitments agreed. In order to do this effectively, it was observed that taking manuscript notes can allow the minute-taker to be 'fully present' and listen to the conversation so as to more accurately capture key challenges, decisions and actions, as well as the tone of the meeting.

A further advantage of handwritten notes is that easily-misinterpreted scribbles can be shredded once the full minutes have been approved, whereas electronic notes and/or recordings might still end up being recoverable from the depths of an IT system. This is not a case of trying to cover up any details but rather of creating a single and agreed source of the truth on the meeting's proceedings and outputs.

Whichever way meetings are recorded, it remains imperative that a clear process and timetable are established to ensure that minutes are drafted in a timely manner whilst memories are still fresh, and that they are reviewed by the appropriate individual(s) and then finalised ahead of the next meeting where formal approval is sought.

If you have any questions or would like to discuss your board support and minuting processes, please get in touch with one of our directors:

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