

Note Taking for HR Professionals



This is a practical one-day workshop addressing some of the issues faced by those who take notes in formal meetings such as grievance and disciplinary hearings, including a 'real-time' note taking activity

Overview

Taking accurate, contemporaneous notes during formal HR meetings is an important activity with serious consequences if not performed well. It does, however, have its challenges as, for most people, it is impossible to write down everything verbatim. That introduces the possibility that the resulting notes will be inaccurate owing to omissions or misrepresentations as the note taker paraphrases the discussion.

The skill of the note taker is to recognise the important elements of the discussion and to ensure these are captured accurately, and verbatim as necessary. This, in turn, means working closely with the Chair to ensure key points are identified and recorded.

After the meeting, the note taker needs to be able to present their notes with clarity and accuracy, avoiding ambiguity. These notes will be crucial in the decision-making process that follows the meeting, and the notes should aid that process without compromising the outcome.

Aims

This workshop aims to provide HR professionals with a format and technique for taking notes during an HR investigation that will enable them to produce records that both aid the decision-making process and, in the event of an objection or appeal, would provide a reliable and complete record of the investigation meeting.

Learning Objectives

By the end of the programme, you will be able to:

- Take notes of a meeting that conform to the required format and are accurate, clear and reliable as a record of the essential information conveyed at the meeting
- Explain the principles of good business writing
- Recognise and write sentences in the active voice
- Convert direct speech into reported speech correctly

Workshop Content

Preparing for the Meeting

- Role of the Chair
- Role of the note taker
- Working effectively with the chair
- Use of abbreviations
- What we need to capture
- Direct and reported speech
- Non-verbal communication during the meeting
- Avoidance of interpretation
- Use of contemporaneous notes
- Report writing

Note Taking - Video exercise

- Correctly identifying and recording key facts
- Avoiding irrelevant information
- Identifying changes to techniques
- Incorporating changes

Principles of Good Business Writing Part 1

- The ABC of good business writing
- Accuracy and brevity
- Quiz

Principles of Good Business Writing Part 2

- Writing with clarity
- Paired exercise

Product Code: NOTHR

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