

A Guide to HR Minute Taking and Transcription



The Trend Toward Outsourcing

It's a time of dramatic organisational change for many. And nobody's feeling the pressure more than employees at the international banks – which means more pressure on their HR professionals.

Employee relations and human resources professionals are finding themselves under an increasing workload. From our unique position, we see these HR professionals seeking more efficient ways to manage these demands.

Employee Consultation Meetings

With many companies managing the processes around redundancy, early retirement and restructuring, there may be new rounds of employee consultation meetings. Of course, each of these meetings comes with its own raft of administrative challenges, from scheduling all the way through to sharing the outcomes. Often the written record is left until last – until someone (usually someone in HR) is assigned the task of taking notes and writing minutes. Sometimes that works just fine. But sometimes the in-house notetakers don't really have time to devote to write a good record of the meeting while still attending to their core responsibilities.

Sometimes a series of different people may take notes for the meetings, so the final records aren't consistent in style. And sometimes – for all the top-notch HR skills the note taker may have – making minutes isn't really what he or she is good at. This is where high-quality outsourcing comes in.

Disciplinary and Grievance Interviews, Hearings and Appeals

A human resources director recently had an interesting story to tell. Her organisation, she said, had run into three issues with taking notes internally. The first was the issue of timing. Because her HR staff had other responsibilities, they couldn't always complete their notes in a timely fashion. It was holding back the disciplinary and grievance process – sometimes quite an expensive sacrifice. She wanted to find a way to move the process along.

The second was the issue of bias. In a recent grievance case, the employee bringing the grievance charged that the minutes of his hearing – which had been taken by an HR officer – didn't accurately represent what happened in the hearing. He alleged that the discrepancy was the result of bias. He wanted to know: how could the HR officer be truly impartial in recording the hearing, when she was employed by the company? Although the HR director believed the notes were impartial, it was hard to demonstrate.

The third was the issue of consistency and quality. Some of her staff were simply better at taking notes than others. She told us that in reviewing the notes for a case that was being escalated, one of her managers had shown her how varied the notes were in comprehensiveness and style. Some notes were brief and sketchy; some were more detailed. The problem was that the differences made it more difficult to show how the organisation had handled the case throughout. These three issues, the questions of timeliness, impartiality and quality, meant that the HR director was, for the first time, considering outsourcing minute-taking for the disciplinary and grievance process.

Preventing Escalation and Making the Case

Much of the HR process is designed to resolve cases before they escalate to tribunals. But inevitably some cases do result in tribunals, and the risk is higher in difficult times, of course. We're hearing a consistent message from clients who have chosen to outsource their HR minute taking and transcription to us. Because professional minutes create a clear record of the organisation's actions, they have two very positive effects. First, this clarity can help prevent a case from escalating at all: it damps down tensions and ensures everyone is on the same page. And second, if it does go to a tribunal, the record can show whether the organisation handled the case responsibly and correctly.

- Employee Consultation Meetings
- Disciplinary Interviews, Hearings and Appeals
- Grievance Interviews, Hearings and Appeals

[About Ubiquus]

Ubiquus is an international meeting and document services company. For more than 20 years we have provided professional transcription and summary writing to the FTSE 100, government departments and the legal sector.

Clients of our HR minute taking and transcription service include:

Bear Stearns, UBS, BNP Paribas, HBOS, KPMG, Merrill Lynch, Citibank, Barclays, Aon.

Choosing a Minute Taker

Here are some questions to ask when you're choosing a minute taking and transcription service for HR meetings.

Do you have experience covering employee consultation meetings and disciplinary and grievance meetings?

- Like any other specialist discipline, human resources and employee relations has its own vocabulary. Make sure your minute takers have relevant experience.

Can you send writers to attend my meetings in person?

- A good minute taker should be able to attend meetings in person as well as work from audio recordings – and they must be professional and discreet at the meeting. Ask what experience the minute takers have of attending professional meetings.

How do you ensure minutes are accurate if an audio recording is not permitted?

- Taking real-time meeting notes is a highly specialised skill. Ask how writers are trained in real-time summary.

How fast can you deliver my meeting minutes?

- The written records of human resources and employee relations meetings are often highly time-sensitive. Your provider should be able to meet same-day, overnight or 24-hour deadlines.

What types of documents do you recommend to capture the content of my meetings?

- Different depths of coverage are appropriate for different uses – and the best providers will be able to explain and advise.

What procedures do you have in place to ensure confidentiality and data security?

- Confidentiality has never been a more important issue. Make sure your account managers can explain their company's operational and technical security procedures. Your provider should be willing to let you visit their premises and test their security measures in person.

How will my account be managed?

- Good service includes good account management as well as good writing. Find out if you will be assigned a dedicated account manager – and ask what experience your account manager has in your sector. Find out how easy it will be to contact your account manager, and who will handle your queries when your account manager is out of the office.

What are your references?

- There's no substitute for talking to other satisfied customers. Ask for references.



The Ubiquus Glossary for HR Minute Taking

[ubiquus]

[Account Management] Your single point of contact within Ubiquus. You'll be assigned an experienced Account Manager who specialises in human resources and employee relations – backed up by a team so your booking process runs smoothly all day, every day, in all seasons.

[Accuracy] Accuracy is everything. Given that a single misheard name, date or figure can diminish the value of the document, we don't leave anything to chance.

[Capacity] Last-minute bookings and overlapping meetings are no problem with our large base of trained writers.

[Confidentiality] Ubiquus deals with some very sensitive projects. We have never experienced any problem with loss of data and we are committed to maintaining our blemish-free record. To this end, we maintain both operational and technical security procedures.

[Consistency] We'll create templates and style guides specific to you. Our writers are trained how to write our different types of documents, whether that's a Standard Summary or a Commercial Verbatim transcript.

[Geography] Our service is where you are. Our central London office serves your meetings in Canary Wharf, the City or the West End, but we attend meetings around the UK and Europe. Indeed, our presence is international. Ubiquus has offices in France, Ireland, Spain, Germany and the US.

[Impartiality] Our writers are trained to be objective. They have no agenda other than to report the content of the meeting. They're impartial – and seen to be impartial.

[Industry knowledge] Our experience is extensive. With our in-depth knowledge of employee consultations and grievance and disciplinary processes, you won't need to spend a lot of time bringing us up to speed.

[References] We provide HR meeting minutes and transcripts for the HR departments of banks, insurance companies and corporates. We'll be happy to put you in touch with people who can tell you what it's really like to work with us!

[Reputation] Ubiquus was formed 20 years ago. In the intervening years, we've become the market leader and innovator in transcription, minute taking, summary writing and event reporting. We are licensed by the Ministry of Justice and we work for most of the FTSE 100.

[Service Level Agreement (SLA)] What does 'great quality' mean in practice? We'll implement an agreed level of service and undertake regular reviews.

[Speed of Service] We understand that transcripts and meeting minutes are most meaningful when they're issued *quickly*. We work to same-day, 24-hour and 48-hour deadlines.





Recommended Services

When you need a complete and accurate record of events, Ubiquis offers a flexible range of transcription, summary writing and minute taking services. But before we start writing, we listen. Our account managers take your requirements as the starting point and advise you on the most applicable transcript or summary in each case. Often, this is as simple as identifying what the document is actually for. Why? Because only written documents that are fit for the purpose have clear value.

For human resources and employee relations meetings, we often recommend one of two types of documents:

Standard Summary (no recording)

At six pages per hour of meeting, a Standard Summary uses rewriting and the selection of primary information over secondary information to achieve its page yield.

- A Standard Summary balances the demands of comprehensiveness and conciseness.
- Summaries are far easier to read than transcripts and can be acted upon quickly.
- They provide a useful, readable record in an HR case file.
- For employee relations meetings, they are ideally suited for publication to intranet and distribution by email.

For a Standard Summary, a Ubiquis writer attends the meeting and takes notes onto a laptop. The polished, edited document is delivered to your deadline – either same day, 24-hour or 48-hour. All your documents will be written in a template that we design to be specific to your preferences. We also build a glossary and style guide to ensure all your documents use terms consistently and correctly.

We pioneered this type of document in the HR arena through work for Transport for London and the Department of Transport. It's become the service of choice for several investment banks, insurance firms and international corporations.

Commercial Verbatim (either attendance or audio)

The most complete account of your meeting, the Commercial Verbatim transcript captures everything that is said in the way it is said. At 18-22 pages per hour of meeting, it's not as readily accessible as a Standard Summary – but it's the right choice when you need a word-for-word record.

- A Commercial Verbatim transcript will be thoroughly edited when it reaches your desk. We apply stringent quality control processes to ensure that all transcripts reflect the way it really happened – abbreviations are correctly identified, names and technical terms are spelled correctly.
- If our transcriber attends your meeting, he or she will take notes and make a digital audio recording – reducing the burden on you to get a good recording.
- We can also work from an audio recording in any format including MP3, audio cassette or microcassette. You can upload digital recordings to our secure server – and of course we're happy to advise on how to get a good quality digital recording.

Like the Standard Summary, Commercial Verbatim documents use a template, style guides and glossaries that we create specifically for you. And like all our services, they can be delivered very quickly to meet your deadlines.