

# SOP Template: Real-time Note-taking and Discussion Documentation

This SOP defines the process for **real-time note-taking and discussion documentation**, ensuring accurate and efficient capture of key points during meetings or discussions. It covers preparation before meetings, techniques for active listening and concise note-taking, real-time collaboration tools usage, organization and formatting of notes, timely review and distribution of documented information, and guidelines for maintaining confidentiality and security. The purpose is to enhance communication, support decision-making, and provide reliable records for future reference.

## 1. Purpose

To outline procedures for effective real-time note-taking and documentation of discussions, enhancing meeting outcomes and information management.

## 2. Scope

Applies to all individuals responsible for taking notes and documenting discussions during organizational meetings (e.g., project meetings, team check-ins, client calls).

## 3. Responsibilities

- **Note-taker:** Prepares templates, captures key points, organizes and distributes notes.
- **Meeting Organizer:** Ensures note-taker is assigned and shares agenda and attendee list in advance.
- **All Attendees:** Participate actively, clarify points as needed.

## 4. Procedure

### 4.1 Preparation Before Meeting

- Review the agenda and objectives provided by the meeting organizer.
- Set up a note-taking template (including date, topic, attendees, agenda, action items, decisions).
- Ensure access to chosen note-taking or collaboration tools (e.g., Google Docs, Microsoft OneNote).

### 4.2 Active Listening and Concise Note-taking

- Focus on capturing key points, decisions, and assigned action items.
- Summarize, do not transcribe verbatim (unless required).
- Use bullet points or short sentences for clarity.
- Clarify uncertainties immediately during the discussion.

### 4.3 Real-time Collaboration Tools Usage

- Utilize shared documents for simultaneous input and transparency.
- Assign editing/viewing rights as appropriate.
- Track changes and comments for accuracy.

4.4 Organizing and Formatting Notes

- Use consistent headings and structure.
- Highlight decisions, action items, owners, and deadlines.
- Proofread notes before finalizing.

4.5 Review and Distribution

- Review notes immediately after the meeting for accuracy and completeness.
- Distribute finalized notes to all attendees and relevant stakeholders within 24 hours.
- Store notes in a centralized and accessible repository.

4.6 Confidentiality and Security

- Ensure sensitive information is distributed only to authorized individuals.
- Follow the organization's data privacy and security policies.
- Secure access to notes using permissions and password protection as necessary.

5. Document Control

Version	Date	Author	Changes
1.0			Initial Version

6. References

- Organizational guidelines on information security
- Best practices for digital collaboration