

Use this checklist before your event to help your live note taker produce the clearest and most accurate record possible.

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Live Note Taking Service

Client Best Practice Checklist

1. Before the Event

- ☐ Confirm whether the transcriber is permitted to record the event.
- ☐ If recording is allowed, agree whether one or two Dictaphones are needed and where they will be placed.
- ☐ Provide the agenda, attendee list and any useful background documents in advance.
- ☐ Share any technical terminology, unusual names or acronyms likely to be used.
- ☐ Confirm whether speakers need to be identified by name in the transcript.

2. Speaker Identification

- ☐ Use clear name cards or badges where speakers are to be identified by name.
- ☐ Make sure names are visible from the distance at which the transcriber will be working.
- ☐ Provide a speaker or attendee list in advance, including roles or job titles where helpful.
- ☐ Arrange the seating so the transcriber can see who is speaking.

3. Room Set-Up

- ☐ Seat the transcriber where they can clearly hear and see all speakers.
- ☐ Provide suitable table space, a power supply and room for recording equipment.
- ☐ Avoid seating the transcriber close to doors, catering areas, fans or other background noise.
- ☐ For hybrid meetings, give the transcriber direct access to the online meeting where possible.



4. Breaks and Timing

- ☐ For full-day events, consider booking two transcribers to reduce fatigue and allow proper rest breaks.
- ☐ Using two transcribers may affect the price, so please contact us in advance for clarity.
- ☐ If only one transcriber is attending, build reasonable comfort and refreshment breaks into the timetable.
- ☐ Let us know in advance if the event may overrun.

5. During the Event

- ☐ Ask participants to speak one at a time and avoid overtalking.
- ☐ Encourage speakers to speak clearly and loudly enough to be heard.
- ☐ Ask anyone whose contribution is unclear to repeat themselves.
- ☐ Discourage side conversations and manage interruptions wherever possible.
- ☐ Make the transcriber aware of any changes to the running order.



6. After the Event

- ☐ Confirm when the immediate draft is required and who should receive it.
- ☐ Agree the timescale for the polished version.
- ☐ Provide corrected spellings, names or terminology promptly if requested.
- ☐ Confirm the secure method for returning the transcript and handling any recording.



On-the-Day Reminders

Introduce the transcriber to the organiser or chair; confirm where they should sit; check that name cards are visible; confirm planned break times; remind participants not to speak over one another; and make sure the transcriber knows who to approach if an issue arises.



Why recording helps

A live draft can be provided immediately after the session, but the most accurate polished transcript is achieved when the transcriber is allowed to check the live notes against a recording. We can sign confidentiality and data sharing agreements covering storage, access, retention and secure deletion.



The clearer and better managed the discussion is on the day, the more accurate and useful the finished transcript will be.