



Secretarial



A Secretaries' Guide to Meetings and Minute Taking



1 Day Course



Classroom or Virtual Blended Training



Accredited Course

Aligned to Unit Standard 13934 (4 credits) in the Business Administration Level 3 Qualification.



Endorsed by OPSA



About the Course

 **Classroom:** R 3, 850 Excl. VAT | **Virtual Training:** R 3, 195 Excl. VAT

If you work as a secretary, administrator, PA, executive assistant or office manager, you will undoubtedly be involved in all aspects of meetings management. Not only are you required to organise meetings, but you are also expected to be present, take notes, summarise action points and distribute comprehensive, accurate minutes.



[View Public Dates](#)



1 Day



Accessible from any Location on any Device



Certificate of Attendance

This intensive 1-day **Secretary's Guide to Meetings and Minute Taking** course will demonstrate the best way to arrange a meeting, from making physical arrangements and preparing the agenda, to confirming attendees and seamlessly moving in late-comers.

You will undertake practical exercises on taking comprehensive notes and discuss techniques for turning these notes into clear, concise and accurate minutes that clearly identify actions and responsibilities.



Course aligned to Unit Standard 13934 (4 credits) in the Business Administration Level 3 Qualification.

Unit Standard Assessment is optional but charged an additional fee of R 1, 450 Excluding VAT per delegate.

What you will learn

- Understanding the most commonly used meeting terminology and jargon
- Understanding various types of meetings and the roles and objectives of the people who attend them so that you can prepare the right type of minutes
- Differentiating between your activities at a formal versus an informal meeting
- A checklist of the key things to arrange before, during and after a meeting
- Knowing how a basic meeting should run, and how it achieves its objectives
- Appreciating the objectives of the "Notice of a Meeting", writing an effective Notice and gaining guidelines for distributing
- Notices of Meetings
- Understanding how to prepare a meeting agenda and how to compile and distribute effective agendas
- Becoming familiar with various types of minutes and practising effective minute taking techniques during a structured role-play situation
- Gaining more advanced minute taking skills using an unstructured role-play exercise
- Being familiar with the workings of formal meetings, such as Annual General Meetings, and the role of a Secretary at these meetings

Who should attend

This course is essential for Secretaries and PAs who are responsible for formal meetings management and would like to become more effective in all areas of arranging meetings and taking minutes.



"I found this to be a very useful course as I learnt a lot of techniques to manage meetings more effectively and eliminate common meeting challenges I've experienced."

- **Personal Assistant,**
HCSBC

Course Programme Agenda

Understanding the Role of Meetings

- Discovering what constitutes a meeting, and what it should achieve
- Identifying the different types of meetings: Committee, AGM, Working group, Informal meetings
- Familiarising yourself with the language of meetings
- Defining your role in a meeting

Organising Effective and Productive Meetings

- Compiling and sending out the notice of a meeting
 - Keeping it short, simple and to the point
 - Distributing notices - who should get a copy
 - Suggestions for more productive meetings
- Designing a comprehensive checklist of arrangements that need to be made
- Discovering what you should take with you, and where you should sit

Preparing a Working Agenda

- Understanding the objective of an agenda
- Standard sections that need to be included
- Using headings that get people to think and prepare for the topic
- Knowing when to attach information to the agenda
- Utilising agenda formats available in MS Word

The Procedures During a Meeting

- Checking attendance
- Reading previous minutes etc.
- Motions, discussions and agenda points
- Calling in guests or specialists
- Brainstorming and idea generation
- Voting and decision making
- Summarising and setting future dates

Identifying the Type of Minutes, you are Expected to Take

- Verbatim minutes - copy of a speech
- Resolution minutes - formal type meetings
- Narrative minutes - telling the story of the meeting
- Action minutes - for working groups etc.
- Techniques and templates for these types of minutes

The Secret to Good Minute Taking

- Understanding the relevance and use of minutes
- Methods of preparing yourself to understand what will be said
- Getting acquainted with terms likely to be used
- Concentrating on what is being said / discussed and agreed upon
- Picking out the main ideas, points and actions
- Discovering the vital do's and don'ts when taking minutes
- Mastering the summarising skills essential to minute taking
- Knowing when and how to interrupt to clarify information you are unsure of

Techniques for Writing up Minutes

- Looking at the different minutes format options you can use
- Tips for making your minutes "reader friendly"
- "Summarising your summary" to keep the minutes to the point
- Utilising the correct tenses for reported speech
- Options for highlighting action points
- Calm, clear and quick - typing and distributing the minutes efficiently

A Secretary's Responsibility of Formal Meetings

- Identifying the types of meetings that must be run formally
- Understanding the rules and regulations governing formal meetings
- Knowing and supporting the roles of key stakeholders at a formal meeting
- Reading minutes and recording those present
- Recording resolutions and voting results

ENDORSED BY



This course is endorsed by the **Association for Office Professionals of South Africa (OPSA)**. Delegates who are professional members with OPSA can claim a **5% discount** for this course and earn 1 CPD point towards their annual development plan.

Visit www.opsa.org.za for more information and sign up as a professional member today.



Short Course Training Formats

We offer 2 Short Course Training Formats, to fit in with your staff development and upskilling objectives.



Public Training

Public training is the ideal choice to develop a specific skill, and it gives employers the opportunity to pre-plan staff training in advance. Every month, we pre-schedule various short courses for the public.

*Classroom training (Johannesburg only) and Blended / Virtual Training (nationwide) is available.



Onsite / In-House Training

Have a group of delegates and want a tailored organisation-specific training solution? Onsite training is the perfect choice! We can customise your staff training to meet your organisation's needs on a date and at a venue that suits you.

*Classroom training (nationwide) and Blended / Virtual Training (nationwide) is available.

Blended training is available on these popular platforms:



Benefits of this Short Course



Staff Acquire Vital Skills



Increases Efficiency and Productivity



Motivates and Empowers Staff



Future-Proofs your Workforce's Abilities



Immediate Impact on Job Performance



Can lead towards a Competitive Advantage



Can Count towards your B-BBEE Score



Staff can Earn Credits towards a Qualification*



Provides a Great Networking Opportunity

Features of this Course



Accessible from any Geographic Location



Expert Facilitators



Practical and Intensive Sessions



Researched to Meet Workplace Demands



Skills you can 'Plug-and-Play' into the Workplace



CBM On-Demand

Training when YOU need it!

No public training short course scheduled on a date when you need it most? No problem. With **CBM On-Demand** we can schedule any course you want, for as many delegates as you need, when YOU want to!

All you need to do to arrange your 'On-Demand' course is to get in touch with us on (011) 454 5505 or email cassidy@cbm-training.co.za. Let us know what your skills development requirements are and we will then arrange your On-Demand course, when YOU need it.



Interested? Here's the Next Step



SIGN UP NOW AND SECURE YOUR PLACE

1. [Click here](#) to register online.
2. Select the training methodology you prefer and the date you would like to attend.
3. Click "make a booking" and fill out the quick online registration form.
4. Choose your payment method to finalise the booking and pay via EFT or credit card.

OR

Click on the buttons below to get a cost estimate before booking.

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HAVE ANY QUESTIONS?

Our professional customer support team is eager to assist and provide you with comprehensive advice and recommend effective skills training solutions.

[Click here](#) to start a live chat with an agent (*available during business hours only*).

Alternatively, call us on +27 (0)11 454 5505 or email info@cbm-training.co.za.

ACCREDITATION AND B-BBEE



CBM Training holds full institutional accreditation status with the Services SETA – accreditation number 0057.



CBM Training has a B-BBEE Level 2 certificate. We have been evaluated and audited by the BEE Verification Agency.

GET IN TOUCH

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