

Responsible capture setup

Consent is a practice, **not a checkbox**. Tell people before you record, tell them what happens to the recording, and be prepared to run the meeting without it.

START HERE · THE THREE LAYERS

Three separate sets of rules can apply to the same recording, and they are not the same rules. Check all three before you record. Not your device maker, not your meeting platform, and not this checklist.

The law

Differs between Australian states and territories, and differs again if anyone on the call is overseas.

Employer policy

Often stricter than the law, and frequently never read by the person recording.

Client obligation

May sit in a contract, a confidentiality term or a professional code.

THE EIGHT STEPS

- ☐ **Decide whether to record at all.** Some meetings should not be. Start with the question, not the device.
- ☐ **Check the three layers.** Applicable law, employer policy, and client or contractual obligation.
- ☐ **Notify before the recording starts.** In the invitation, and again verbally at the start. The invitation alone is not enough.
- ☐ **Get and record agreement.** Note any objection and what you did about it.
- ☐ **Decide storage before capture.** Where the file and transcript live, who can access them, and when they are deleted.
- ☐ **Set up the capture.** Audio conditions, speaker labels, a naming convention, and a note of who was present.
- ☐ **Check the transcript for accuracy** on the points that matter, before you rely on it.
- ☐ **Handle the failure cases.** No speaker labels, poor audio, a late joiner who did not hear the notice, and a participant who withdraws consent mid meeting.

Leave the recorder off for these

- ◆ Performance conversations and disciplinary matters.
- ◆ Health and personal disclosures.
- ◆ Legally privileged discussions.
- ◆ Remuneration discussions, where policy prohibits it.
- ◆ Any meeting where a participant has objected.
- ◆ Anything covered by a client confidentiality term that does not permit recording.

The practical rule, if you want one sentence to carry with you: if you would hesitate to tell the room the meeting is being recorded, do not record it.

WORDING YOU CAN USE

Two forms, written in plain, non threatening language. Adapt them to your own voice and obligations.

In the meeting invitation

I use an AI note taker to capture actions and decisions in our meetings. It records audio and produces a transcript, which I store in [location] and delete after [period]. If you would prefer I did not record, tell me before we start or at any point during the meeting, and I will turn it off and take notes by hand instead.

Spoken at the start

Before we get going: I have a note taker running so I can capture the actions and decisions accurately. The transcript goes to [location] and I delete it after [period]. Is everyone comfortable with that?

Then pause and let people answer. If anyone hesitates, turn it off. A recording obtained through an awkward silence is worse than no recording.

When someone would rather you did not

No problem at all, I will turn it off. I will take notes by hand and send the summary round afterwards so we still have the actions written down.

Record the objection and what you did about it. The method does not depend on capture.

YOUR SETUP, WRITTEN DOWN ONCE

- ☐ **Device or platform:** _____
 - ☐ **Notification wording** added to my standard meeting invitation.
 - ☐ **Storage location:** _____ (an account the organisation controls, not a personal one)
 - ☐ **Who can access it:** _____
 - ☐ **Retention decision:** delete after _____
 - ☐ **My do not record list** is written down and I have read it.
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SEVEN WAYS THIS GOES WRONG

- ◆ Notifying in the invitation only, so anyone who did not read it never consented.
 - ◆ Recording first and asking later.
 - ◆ Storing transcripts in personal accounts.
 - ◆ Never making a retention decision, so nothing is ever deleted.
 - ◆ Relying on speaker labels without checking them, then attributing a decision to the wrong person.
 - ◆ Assuming the platform's consent prompt satisfies your obligation.
 - ◆ Assuming a rule you learned in one state or country applies everywhere.
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Practical guidance, not legal advice. Nothing here is legal advice. This is general guidance written for business readers. It does not take account of your jurisdiction, industry, contracts, employer policies or specific circumstances. Consent rules differ across Australian states and territories and differ again overseas, and workplace and client policies may be stricter than the law. If you work in a regulated industry, are recording across state or national borders, have had a client object, are in a dispute, or are designing a recording policy for an organisation, get advice from a qualified legal practitioner before relying on anything here. Concludo Pty Ltd accepts no liability for decisions made on the basis of this checklist.

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Concludo Pty Ltd, Melbourne · ACN 701 605 898 · Drawn from the Meeting Mastery Workbook, chapter 9.