Business Meeting – Tip #4

How to Handle Confidential Records

QUE TIPS

There is nothing that excites the curiosity of many people more than being privy to confidential records. If you're the Secretary of an organisation or business, make sure you don't provide bait for the curious (or you already have?) by learning how to handle confidential records. ***Here are 7 tips to help you:***

1. Be sure you know which documents are confidential even if you have not been specifically advised that they are. They are those that contain information, which for one or more reasons, should only be disclosed to specific people or groups.

2. Clearly indicate those aspects of a meeting or the specific documents which are confidential. E.g. those dealing with trade secrets, personal information, etc.

3. Limit the circulation of confidential documents and make a special effort to ensure that they don't mistakenly fall into the wrong hands. E.g. Hard copies in lock folders, soft copies password protected, etc.

4. As it relates to meetings, if previous permission was granted to record the meeting proceedings, withdraw it for the confidential part. Be firm about this!

5. Determine and share the consequences for sharing confidential information. This is usually important for those who you work with – Personal Assistant, for example.

6. Specify how it should be handled after the meeting. Who should receive an unedited version, who should receive just a summary or who should not even know that it exists.

7. Don't be the culprit! Yeah…the one who finds that s/he cannot keep this hot, juicy information to themselves! You are a professional…Remember?

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