

IRENE BOSTON TRANSCRIPTION SERVICES

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WORKSHOPS / BREAKOUT SESSIONS FACILITATION GUIDELINES & RECORDING TIPS

We have a wealth of experience in what works and what doesn't work when conducting and recording workshops and breakout sessions from conferences, focus groups and meetings. These guidelines are divided into **facilitation advice** and more **technical recording tips**, as well as addressing any specific **workshop and breakout session transcription** issues. We hope that this will help our clients to make recordings of the highest quality which will, in turn, cut down on transcription times and costs.

Please see our [conference transcription](#), [focus groups](#) and [meetings transcription services](#) pages for details of the services we offer and our [Equipment](#) pages for further advice.

FACILITATION GUIDELINES - PLEASE DO...

Think about the **recording location**. Recording in a quiet environment ensures the best quality of sound recording. If possible, choose a venue equipped to host situations such as workshops. They will not only be able to provide enough soundproof rooms but usually all the recording equipment as well.

If you're providing the room yourself but hiring professionals to record the event, think carefully about the **acoustics of where you'll be recording**. A large room with a high ceiling ('church' like conditions) produces significant echo resulting in a 'booming' on the recording which could make the participants difficult to hear, especially if any have quiet voices.

If you're holding several workshops at the same time, ensure that you use **separate rooms**. **Do NOT put everyone in one big room**. The subsequent background babble as all the groups interact will make each recording difficult to hear.

Seek professional help when recording workshops or breakout sessions. When there are multiple speakers, possibly in separate rooms, it's vital to seek professional help to ensure that everything is clearly recorded.

The ideal solution is to use **conference mixer type microphones, noise cancelling or omni-directional microphones** connected to professional recording equipment via a direct feed. If you're using a venue specialising in hosting group meetings, it'll have its own in-house recording facilities or specialist technicians who can advise on the best recording option. **DON'T** skimp on this essential step - it will be a false economy. If the meeting venue gives you the choice, ensure you choose **digital for recording**, rather than analogue.

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FACILITATION GUIDELINES - PLEASE DO... cont/d.

Provide the transcriber with an **agenda, list of topics and participants**, as well as any presentations or handouts supplied, as this will help to establish 'key words' that may be not in common usage but are particularly relevant to the workshop topic. A typed version of any flip charts used would also be helpful. A good transcriptionist will also be able to search out most unusual words using Google, but it saves time if you've already provided relevant material.

Obtain necessary permissions from your workshop participants while arranging up the event. Ensure that they're aware they'll be recorded and that the recording will be transcribed. If they suddenly object on arrival, you may have to abandon the recording.

Transcription issues - this includes deciding on the **type of transcript** you require - see our [Definitions](#) page for clarification. Decide if you wish any housekeeping or briefing issues to be transcribed. Is it essential that **each speaker is identified**? This will greatly increase the costs, particularly with a large group and add to the transcription time. We've developed a transcript style specifically for [focus groups or workshop](#) type situations. If participants need to be identified, ensure you provide a **list of names** with companies, job titles or any other relevant information. Ensure that you include the **speaker voice brief** made during the workshop - see [below](#).

Ensure that you choose an effective and **experienced moderator** or facilitator to run the workshops. This is as vital as the choice of venue and recording equipment. An inexperienced or ineffectual moderator will be overrun by a boisterous group and all their valuable contributions will be lost. A facilitator who can control a workshop or breakout sessions effectively will make an enormous difference to how much of the speech can be heard on the recording and, therefore, transcribed.

Hold a **rehearsal** in the meeting room(s) before the event. Use colleagues to replicate the number of participants if possible. Use this situation to test the recording equipment, check on sound levels, the best microphone positions and to identify any background noise problems. **Listen to this test recording through headphones** - this is what the transcriber will hear. If you can't hear the voices, neither will the transcriber.

Brief the participants - reiterate the purpose of the workshop and run through any necessary background material at the beginning before you begin recording, unless you specifically need this to be transcribed. For example, you may want to prove that you did brief the participants thoroughly and explained that their contributions were non-attributable, or to record that they gave their permission to be recorded. Lay down a few ground rules firmly.

Remind all participants not to talk over each other or what they contribute will not be captured. Don't be afraid to remind them of this again during the discussion, if anyone becomes passionate, excited or angry and they start talking over each other.

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FACILITATION GUIDELINES - PLEASE DO... cont/d.

Minimise background noise wherever possible, whether this is scraping of chairs, noisy air conditioning, or the clatter of crockery. Background noise is often more intrusive on recordings than we realise at the time, and voices can often be swamped by any extraneous noise, especially if people are softly spoken.

Provide refreshments before or after the workshop if possible. It's tempting to have tea or coffee on the table to relax the participants but please confine any refreshments to break times if you can. If there's cutlery or crockery on the table, the clattering will be the loudest sound on the recording.

Turn off all mobile phones. Text messages or voice mails emit a radio frequency which is inaudible to the human ear but the recording equipment will pick it up, and the resulting buzzing noise will drown out whatever is being said at the time. Turning mobile phones to 'silent' or 'vibrate' mode is not enough - they need to be turned off.

Conduct introductions. If each speaker needs to be identified on the transcript, **ask each participant to introduce themselves** and perhaps describe where they live and work. This will help the transcriber to 'tune in' to a particular voice, and may enhance the chances of recognising that voice later on in the recording. If the workshop involves many participants, ask each person to state their name every time they make a comment, as difficult as that may be to remember in the heat of debate! If a person introduces themselves at the beginning, but then doesn't say another word for an hour, it is unlikely the transcriber will be able to remember exactly what that earlier voice sounds like. Alternatively, ask the moderator to thank each participant by name after every contribution.

Make a speaker voice brief. If introductions aren't made at the beginning but you still need each speaker to be identified in the transcript, it's essential that someone **makes notes as the workshop or breakout session progresses** to give the transcriber a clue as to **which voice belongs to which name**. Not every voice will be sufficiently different as to make it obvious who is speaking. Please remember that the transcriber will **never have heard these voices before**, so it will be impossible to ascribe a name to a voice without help. You'll need to give as many clues as possible on accents, description of voices (clear, soft, talks in coherent sentences, rambles, any verbal quirks). This is particularly useful if some participants share the same first name.

A **place map** can also be helpful - if you log where each person is sitting, the transcriber may then be able to work out which voice sounds nearer to the microphone, or is coming from the left or right.

Ensure participants sit in the same places after refreshment breaks. If they move, this renders any 'place map' useless. Any experienced transcriber will be able to 'learn' where certain voices are coming from and letting everyone move around will confuse the issue. If it's necessary to have people in different groups halfway through, you'll have to ask them all to **reintroduce themselves** if you want the voices identified on the transcript.

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FACILITATION GUIDELINES - PLEASE DO... cont/d.

Ensure the participants can be heard. A participant who has a quiet voice or mumbles will not be picked up by the recorder, however sophisticated it might be. If you can't hear what's being said, then the chances are we can't either on the finished recording. Although it may be difficult to interrupt or risk putting someone off, if their responses are valuable, you have to be firm.

Ask them to speak up or to repeat anything you don't hear clearly. Invariably, people don't realise they're speaking softly - we rarely 'hear' our own voices. If they regard taking part in a workshop as important enough to set aside time, the chances are they'll want their contribution heard. Most are happy to speak up if asked to do so.

Be firm if you're chairing a workshop or breakout session. As tempting as it may be to let the discussion ebb and flow and to interrupt as little as possible, it's important to achieve a balance between intimidating the participants so they barely contribute and allowing it to descend into mayhem.

People in groups tend to talk over each other, often at a fast pace and particularly if they become animated or angry about what they're discussing. If this happens, **ask everyone to speak clearly and individually** or they'll not be heard and their important contribution lost. And don't be afraid to ask participants to shut up if necessary! If you have a participant who is very loud and dominant, that's all the recording equipment will hear. You might as well do a one-to-one interview with them for all you'll capture of the other participants, especially if they're softly spoken and timid.

Moderators can tailor their approach depending on what they want to achieve from the group and the type of participants they have. Telling company directors not to talk over each other may not go down too well! But asking individuals giving feedback about a product to repeat what they've said tends to be a bit easier. It's also important not to let the main discussion go off on a tangent. Similarly, try to discourage anyone from banging on the table to emphasise a point - it will drown out whatever is being said at the time.

Assist in clarification. If materials are being used during the discussion, such as presentations, photographs, or adverts, remember that it may need to be **identified on the transcript**. So it would be a good idea to say what the 'IT' is that's being shown. Letting a participant say, 'that is better than that' doesn't make great radio! You may remember what 'that' is at the time but will you later on when it comes to analysing the transcript? And if participants just nod or shake their heads, either ask them to say yes or no, or confirm verbally what they've done.

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FACILITATION GUIDELINES - PLEASE DO NOT...

Record several workshops in one room - it may be easier to hire one large room, and you may think by providing a separate recorder on each table, that will take care of the recording needs but it won't! If you try to record in such an overall noisy environment, all the individual recorders will do is pick up the background babble from the other tables. It will render each recording very difficult to hear, thus increasing transcription time and costs and may result in an incomplete transcription.

Record in a noisy environment - background noise is often more intrusive on recordings than we realise at the time. Voices can easily be swamped by extraneous noise, especially when participants are softly spoken. If people talk about sensitive issues, they'll invariably drop their voice which makes it doubly difficult for any recorder to pick them up.

Leave windows open - however hot the day may be, windows need to be closed. Noise from traffic, roadworks and aeroplanes will all impact on your recording. Unless using noise cancelling microphones, most mics are not as selective as the human ear and can't filter out extraneous noise in the same way we can. They record everything they hear and the loudest noise will dominate.

Allow participants to speak over each other. In an animated discussion, particularly with a large group of people, there can be a tendency for several to speak at once. Please ensure you brief them beforehand that, if they do, then their contributions will be lost. And if they persist in the heat of the moment during the debate, diplomatically ask each to repeat what they said for the sake of the recording. Such a gentle reminder is often all that's needed!

Shuffle papers or write near any microphones. As this may be the source of the nearest noise, that's what the microphone will hear and it will drown out whatever is being said. If you need to refer to a list of questions, it may be worthwhile either having them on one side of A4, if possible, or on cards for ease of reference.

Write near the microphone if you can avoid it. We have often heard recordings where the scribbling of a pen is the loudest sound we hear throughout the recording!

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RECORDING TIPS - PLEASE DO...

Use recording equipment that is fit for purpose - we would urge all clients to **use digital recordings**. They produce an excellent sound quality which will cut down on transcription time, minimise the number of inaudibles and reduce costs. Please read our [comparison](#) between digital and analogue recordings. Ensure that if you are carrying out workshops or breakout sessions in different rooms, you have sufficient equipment to cover each room.

Choose an uncompressed digital setting - most digital recorders offer recording settings ranging from SHQ (stereo high quality) down to LP (long play). SHQ produces the largest file size but the best quality. HQ is a good compromise but LP produces the poorest quality. Don't compromise on quality just to save memory space.

Use the **highest uncompressed quality level your recorder offers** - issues over file size and length of time to transmit the digital files are trivial compared to the production of a good quality recording. You can probably get away with a lower quality for dictation, but will need the highest quality for multiple participant interviews, conferences or focus groups or meetings.

Decide on a suitable digital audio level and file type - 8,000kHz should be suitable for dictation. 44,100kHz is the highest end of the range and produces exceptional recordings but there is a trade off in larger file sizes. Ensure you choose a digital file type which is compatible with transcription software. We discuss the pros and cons of the more common file types such as wav, dss, mp3 and wma [here](#).

Use sufficient external microphones - most built-in microphones are of poor quality with limited control over volume levels. Using a good quality, external microphone will greatly enhance the quality of the recording. Ideally, we would recommend using a minimum of **one noise cancelling microphone for every 2 people** and you'll need a **mixer** to connect all the microphones to your recorder. You may be able to use an **omni-directional microphone** in the centre of each table for up to about 5 participants per table.

Lapel microphones are best for moderators or workshop leaders as they tend to move around. If you rely on the table microphones to pick them up, their questions or comments will probably not be heard. The only disadvantage with lapel mics is they tend to also pick up the rustle of clothing. We discuss microphones in more detail on our [Equipment](#) pages.

Test the equipment - this may not be an issue if you're using a specialist venue as they will generally have a rehearsal and test equipment before the workshops. If you listen to any test recording they make, please do so through earphones. This is how a transcriber will hear the recording.

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RECORDING TIPS - PLEASE DO NOT...

Use standard audio tapes for workshops. They have been superseded largely by digital, either minidisc or digital audio sound files which produce a far superior quality of recording.

Use mini tapes or micro-cassettes for anything other than dictation. These are designed for one voice using a dictaphone held very close to the mouth as they have an in-built microphone. If that same equipment is used on a table between speakers, the recording will be very poor and with background noise, virtually inaudible.

Use a slow recording speed - some analogue recorders can be used at slower speeds. This extends recording time and saves on the number of tapes used. However, there is a consequential loss in recording quality and an increase in the amount of background hiss. We'd recommend that you use only the **fastest speed setting** on your recording equipment. Tapes are comparatively cheap, so why save on tape costs when those savings will be swallowed up by extra transcribing time and costs?

Use voice activation. If you use recorders with a voice activation feature and you're too far away from the microphone or speak softly, this may not be picked up by the equipment. We've found that some recorders are not very sensitive and will sometimes switch off in mid-sentence if the sound level goes below the minimum pick up threshold. There is also a slight time delay between someone speaking and the recorder starting up again, so beginnings of sentences are often chopped off.

Use the time-stamp bleep. Some recorders come with an option to insert a bleep at intervals. Please turn this off! Each time the recorder inserts a bleep, it drowns out any voices and will result in an incomplete transcript. Our transcribers are experienced in inserting time stamps where required without electronic help.

Send copies of audio tapes - If, despite all the above, audio tapes have been used, please ensure you send **only** original tapes to the transcriber. Original audio tapes will always be clearer than copies, regardless of the quality of the copying equipment. Transcribing from a copy increases transcription time and costs. Digital files do not degrade when copied - all analogue media does.

These guidelines relate to workshops and breakout session transcriptions. Please use the links above for guidelines designed for any other recording situation.

If you have any questions relating to workshop transcription and recording not covered on this page, please contact us on 01485 543746 or Boston@ibss.fsnet.co.uk and we would be happy to help.