1. **Types of Meetings Captured**
   * **Client Meetings**: Pitches, relationship updates, negotiation calls.
   * **Internal Meetings**: Deal team syncs, management committee updates.
   * **Due Diligence Calls**: With lawyers, accountants, third parties.
   * **Market Sounding**: Conversations with potential investors or buyers.
2. **Modes of Note-Taking**
   * **Manual Notes**: Typed into OneNote, Word, or email drafts during/after meetings.
   * **Email Summaries**: Sent internally as “call notes” or “meeting recaps.”
   * **Templates**: Many banks have standard templates for meetings, especially client interactions (e.g., situation overview, key asks, next steps).
   * **CRM Input**: Notes are often logged into systems like DealCloud, Salesforce, or proprietary CRMs.
   * **Recording + Transcription (Informal)**: Increasingly used but with caution due to compliance and client sensitivity.

| **Purpose** | **Description** |
| --- | --- |
| **1. Deal Continuity & Memory** | High turnover, long deal cycles — notes help onboard new team members fast. |
| **2. Risk & Compliance** | Record of what was said/offered — especially important in regulated settings. |
| **3. Strategic Insights** | Notes across multiple client meetings reveal trends and deal opportunities. |
| **4. Team Coordination** | Analysts, associates, and MDs align on next steps and execution tactics. |
| **5. Relationship Management** | Notes help recall client preferences, decision-makers, and pain points. |
| **6. Accountability & Coverage** | Notes show senior management that teams are active and covering key accounts. |
| **7. Execution Tracking** | Captures deliverables, asks, and blockers for follow-up. |
| **8. Legal Record** | Some notes may serve as legal documentation in deal disputes or audits. |