

# ASSIGNMENT GUIDE: NOTE-TAKING ONLINE CLASS

## OVERVIEW

Welcome to your note-taking online class. This training is a mixture of an interactive, online course and an infographic. The online class is a precursor to the in-person writing lab that you will take soon. Take the time to get to know this information so that you come prepared to the lab.

The purpose of this class is to introduce you to at least one note-taking technique and some tips that will help you level up your skills. Don't miss key details or have notes that you can't use. If you are going to take the time to take notes, make sure you can use them! After the online training, you will be able to practice these skills in the lab event.

This document will help guide you through your learning experience. It will provide you with directions, places to take notes, as well as opportunities to reflect on what you are learning.

Let's get started!

## STEP 1: OPEN YOUR ONLINE CLASS IN ACADEMY

Let's dive into our first training item, an online class! If you haven't already, **go to your curriculum in Academy and open the online class called "Note-Taking Techniques Online Class".**

During this class, you will learn about at least one note-taking technique. You are welcome to learn about more than one, but for your lab experience, you will want to pick one to focus on and practice.

Your options are:

- The Cornell Method
- The Outline Method
- The Quadrant Method
- The Slides Method

Once you have learned about a note-taking method, try a few of these suggestions to practice!

- Watch a TED talk and take notes using the method you chose.
- Search Academy for an online course and complete it. Take notes using your chosen method.
- Review notes from a previous meeting and see if you can recreate them using one of the methods you learned about.
- Read an article or KB page and take notes as you read.

NOTES

## STEP 2: OPEN YOUR INFOGRAPHIC

Now that you have an idea of how to structure your notes with the techniques you learned about in the online class, let's take a minute to look at some tricks you can use to take your skills to the next level. **Open the infographic in your Academy curriculum titled "Five Tips to Take Effective Meeting Notes".**

Review the information in the infographic and then complete the exercises below to practice a few of the tricks.

### EXERCISE #1: SHORTHAND PRACTICE

Read the text below and then take notes on the information using shorthand. Remember that the purpose of notes is not to *rewrite* the entire paragraph, but to **summarize** the main ideas. How simple/short can you get your notes?

#### 3. Meeting notes should focus on what comes next.

One might say that capturing action items is the most important reason to take notes in the first place — the reason the meeting is happening at all.

Be sure to write down all actionable items, decisions and recommendations — and sum them up in your own words to reinforce your understanding of what's supposed to happen next.

Record items as they come up, directly into your CRM, rather than after the meeting when time starts to mess with your memory. This will ensure that you capture the most accurate information.

Figure 1: Source: <https://www.copper.com/resources/how-to-take-meeting-notes>

Use this space to write your shorthand notes:

### EXERCISE #2: SUMMARIZE

Let's practice summarizing! Read the snippet of information on the next page. In the box provided, summarize the main ideas and topics covered. Feel free to use shorthand where possible.

## 2 How to take effective meeting notes

There's nothing worse than spending an hour in a meeting and then afterward not being able to remember the important details because you didn't record anything.

The opposite is just as bad. You wrote down everything that everyone said but didn't engage in the most important discussions during the meeting.

But taking meeting notes / meeting minutes that people will actually use doesn't have to be hard. Just follow a few easy practices.

Whether you're running **daily stand-ups** or hosting **weekly one-on-ones**, the following ways to organize your meeting notes can improve note-taking across a range of **meeting types**.

### Start with your meeting agenda

Instead of starting from blank, copy the meeting agenda to provide structure to your notes.

### Keep a record of all attendees

Before the meeting starts, note who is there. Listing every participant in the room is less about attendance than it is about transparency. If someone who didn't attend has concerns about a meeting decision, for example, having an attendee list ready will help you to recall who had a hand in making it.

Browse 80+ meeting notes templates (Free to download)

### Note decisions, outcomes, and action items as they occur

There are really only three (3) takeaways you need to keep track of in your meeting notes

1. Decisions
2. Outcomes
3. Action items

Write these down as they happen if possible.

If someone gives an update or presentation, resist the temptation to take detailed notes unless you know someone is missing the meeting but would need that information. For very important discussions, you may want to record each main point or what ideas are discussed (rather than the entire discussion).

Notes do not need to be a verbatim accounting of everything that happened.

They should, however, highlight what was accomplished, what responsibilities were given, and what decisions were made."

*—From the book **Vital Meetings***

### Forget about capturing everything

Stick to the key points. You're likely to miss out on something important--like the group moving on without making a decision--if you try to capture everything word-for-word. When taking meeting notes, follow the **Vital meetings framework** and focus on what's needed: decisions, outcomes, and action items.

Summarize the information here:

Figure 2: Source: <https://www.hugo.team/blog/meeting-notes-you-will-use#2>

## EXERCISE #3: CLEAN UP!

For this exercise, go and find notes you have previously taken. It may be from a meeting or from a class you have attended. If you can't find any notes, try this exercise after taking notes for a meeting in the near future!

Review your notes and clean them up.

Ask yourself these questions as you review and clean up your notes:

- 1) Can you read your handwriting/typing? If not, go back and rewrite/type the areas that need to be rewritten.
- 2) Were there areas that you took notes verbatim, and you could summarize the information?
- 3) Can you use highlighters or other marking techniques (underline, symbols, circling) to highlight the action items or follow-up questions from your notes?
- 4) If you don't have headers/titles to the different sections of your notes, can you add some to make it easier to scan your notes later?
- 5) Is there extra information that is not necessary?

## SHARE WITH OTHER TEAM MEMBERS

Now that you have completed these exercises, check out the Teams channel where you can share how you completed the exercises above, ask questions, and share other tips and tricks that have helped you take notes throughout your experiences!

### [\*\*CLICK HERE TO JOIN THE TEAMS CHANNEL!<sup>1</sup>\*\*](#)

**NOTE:** You can leave this channel at any time. Please use this as a professional learning space. Personal chats/comments will be removed and team members who are not using the channel for its intended use will be removed.

## STEP 3: MAKE SURE YOU ARE REGISTERED FOR THE IN-PERSON LAB

Check Academy to make sure you are registered for the next in-person [Effective Note-Taking lab<sup>2</sup>](#). If you have more than a week before your lab, remember to do a quick review on the day of your session!

### **HYPERLINKS IN THIS DOCUMENT:**

1. [https://teams.microsoft.com/l/team/19%3axYW7\\_xDVPkqD2k3qqOGEzxPfsgozq2AZPjloJ2Gmpto1%40thread.tacv2/conversations?groupId=9e7e98f2-bc3a-4431-b3be-7425f149a3d4&tenantId=13d3189d-22a4-4f96-bbc9-2af46c222581](https://teams.microsoft.com/l/team/19%3axYW7_xDVPkqD2k3qqOGEzxPfsgozq2AZPjloJ2Gmpto1%40thread.tacv2/conversations?groupId=9e7e98f2-bc3a-4431-b3be-7425f149a3d4&tenantId=13d3189d-22a4-4f96-bbc9-2af46c222581)
2. [https://unitedshore.csod.com/samldefault.aspx?returnurl=%252fDeepLink%252fProcessRedirect.aspx%253fmodule%253dlodetials%2526lo%253d1d34d1da-cc28-44a5-886f-0c8cdffb3880](https://unitedshore.csod.com/samldefault.aspx?returnurl=%252fDeepLink%252fProcessRedirect.aspx%253fmodule%253dlodetails%2526lo%253d1d34d1da-cc28-44a5-886f-0c8cdffb3880)

**If you have any questions or concerns,  
please reach out to the IT Training team at [ITTraining@uwm.com](mailto:ITTraining@uwm.com)**