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7 Tips for Taking Better Notes & Being More Efficient

By Kristina K. Schneider, Practice Success Coach

Whether you're an executive assistant or any other type of administrative staff member, note-taking is an inevitable and unavoidable task that you will have in your daily routine. There are so many different details and tasks necessary to complete your job that it is impossible to keep track of them all. If you aren't currently in the practice of taking notes during your meetings with your boss or supervisor, we highly recommend that you start now. It's a great way to prevent overlooking the small items and, if there's ever any confusion or debate about what was determined at a particular meeting with another staff member or your boss, you have your notes to reference in the future.

Detailed note-taking is not only a smart idea as a support staff member, but it also shows that you care about your job. One of the biggest fears that people have (especially the Type A boss personalities), is the ability to trust and feel comfortable handing off and delegating tasks to others. No matter how great your memory may be, you could easily forget some of the small details. Taking detailed notes is a great way to demonstrate that you care about the smallest of details and that your job is important enough to you to make sure that every detail is properly taken care of and every task is completed.

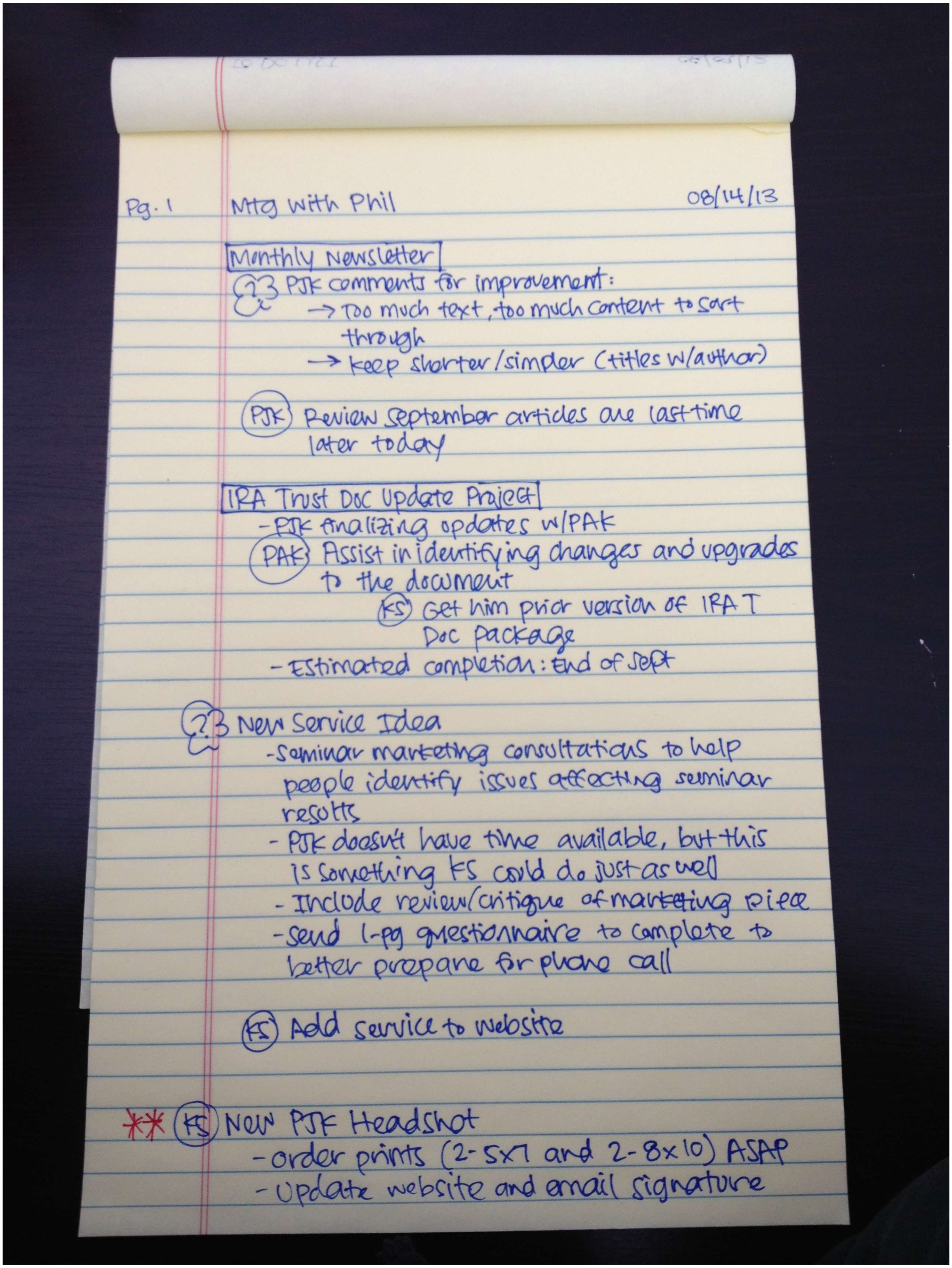
Here are some very simple tips for taking more effective notes in your staff meetings. (Frankly, these tips are helpful even for advisors/bosses who may be meeting with staff members or clients - - so you may want to forward this article to them!)

Note-Taking Tip #1: Use a bound notebook or notepad. With all kinds of papers floating around the office and your desk, it is better to keep a bound notebook or notepad so that you can keep your notes together. It also makes for an easy writing surface, particularly if you don't have a desk space or another hard surface to write.

Note-Taking Tip #2: Bring multiple pens with you. In the hustle and bustle of the office, your boss may be jammed for time and the last thing you need while in the middle of a much-needed meeting is for a pen to run out of ink or stop working. Be prepared with multiple pens and, depending on your preferences, you might even organize your notes with multiple colors (such as a red pen to help you star and/or identify urgent items).

Note-Taking Tip #3: Circle initials for "To Do" items. One of the brilliant techniques that we use actually comes from working for Phil, because it's a technique that he uses in his own notes. This technique is circling initials to identify "To Do" items for a specific person, whether they are tasks for yourself or for others to whom you might need to delegate. This becomes a great way to not only assemble and prioritize your own To Do List, but it also becomes an accountability checklist. As you complete or delegate a task, you check off or cross out the circled initials. We might not check items off for others until we know they've complete those tasks, so it becomes a great way to follow up and check in with others that they've handled something that you've delegated. This is a technique that Phil has used for years and that we have found invaluable as well.

Here's a sample page of notes that we've thrown together so you can get an idea of what we're talking about.



Pg. 1 Mtg with Phil 08/14/13

Monthly Newsletter

?? PJK comments for improvement:

→ Too much text, too much content to sort through

→ keep shorter/simpler (titles w/author)

PJK Review September articles one last time later today

IRA Trust Doc Update Project

- PJK finalizing updates w/PAK

PAK Assist in identifying changes and upgrades to the document

KS Get him prior version of IRA T Doc package

- Estimated completion: End of Sept

?? New Service Idea

- Seminar marketing consultations to help people identify issues affecting seminar results

- PJK doesn't have time available, but this is something KS could do just as well

- Include review/critique of marketing piece

- Send 1-pg questionnaire to complete to better prepare for phone call

KS Add service to website

** KS New PJK Headshot

- order prints (2-5x7 and 2-8x10) ASAP

- Update website and email signature

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BONUS TIP: If this method is too confusing, some people have found it helpful to just have a separate notepad available only for jotting down "To Do" items. This method avoids having to go through your notes to identify tasks that need to be completed. Either way, having some kind of system of identifying tasks instead of mere informational notes is essential to being an effective and efficient assistant!

Note-Taking Tip #4: Identify future ideas or brainstorming items. We constantly come up with a lot of new ideas for our company, but we can't always get to them right away. So, we have made a similar technique to the circling of initials for our "future ideas". This technique is what we call our "Idea Cloud" symbol, which is just a question mark with a cloud boxed around it (see icon next to "New Service Idea" in the picture of the notes above). These items from our notes get transferred to another file for either a future meeting or a more in-depth business planning meeting. Sometimes these ideas simply come from other topics we are discussing, but when we don't have time to get into further detail, so these ideas get jotted down with the question mark cloud icon so that we don't forget them and can revisit them later. This technique is great for items your boss indicates are "on hold" for now, but doesn't want to later forget.

Note-Taking Tip #5: Write as much down as possible, but be sure to write legibly. It's helpful to write down as much as you need to in order to help you at a later time when you need to go back and review your notes. We got into this habit early on as our weekly meetings with Phil were scheduled late on Friday afternoons (we now hold them earlier in the week). We needed more details written down to help jog our memory come Monday morning and it came time to review our notes and pick up where we left off. The more you can write down, the better off you will be - - but only if you can read what you wrote! Nothing is more frustrating than sitting there, wasting precious time, trying to read through your own chicken scratch.

Note-Taking Tip #6: Use page numbers. This might not seem that important, but it'll help you better sort out your notes in the future. It might even be helpful to paginate your notes along with the date, since it wouldn't be that unusual to have multiple "Page 2's" among your stack of notes.

Note-Taking Tip #7: Retain your notes for future reference. Depending on your preference, you can keep your notes in a standard bounded folder or notepad or you can tear out your notes and simply retain them in a folder that you've clearly identified as "Staff Meeting Notes". We retain files for our staff meetings with all of the support staff and we retain a separate folder for our notes from our meetings with just Phil. We sort them by year and organize them chronologically by date, so that if we need to revisit them, they're easily accessible. You can staple or paper clip notes from each meeting, if necessary, to keep papers better organized. Some people might find even maintaining a binder and using letter-sized sheets of paper helpful in organizing.

In conclusion, find what works for you. These are the tips, tools and techniques that we have found to be the most helpful for us during our meetings. There are simply too many details and tasks to remember to do and it's so easy to miss a detail when you're not taking properly organized notes from your meetings.

ABOUT THE AUTHOR

Kristina Schneider is a Practice Success Coach here at The Ultimate Estate Planner, Inc. She graduated with a Bachelor's Degree in Business Administration from Pepperdine University in 2004 and was hired right out of college to work for the Law Firm of Kavesh, Minor & Otis, coordinating and facilitating Philip Kavesh's "Missing Link" Boot Camps while also providing administrative support to Mr. Kavesh as his Executive Assistant for over seven years. Through her direct hands-on experience in Mr. Kavesh's law firm, Kristina has been able to assist numerous estate planning professionals through The Ultimate Estate Planner and, equally as important, many of their staff members, in the successful implementation of Ultimate Estate Planner's products and systems. She is currently pursuing her MBA degree from Pepperdine University Grazadio Business School.