KU Skills Session

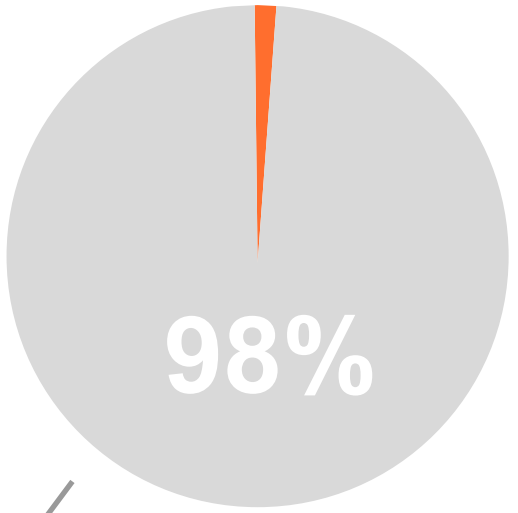
THE KINETIX GROUP

Maximize Your Meeting Notes

Its Not Just Note-Taking…

- After **1 hour**, people retain **<1/2** of information
- After **1 day**, people forget **>70%** of information
- After **6 days**, people forget **75%** of information

98% of the population **doesn't multitask well**



Studies show you **lose up to**

40% efficiency

when you multitask

…It's Understanding Our Business!

"A core business strength is making a connection between what's going on and translating it back to our clients"

"Clients appreciate that we can recall things quickly"

Set Yourself Up for Success

Considerations

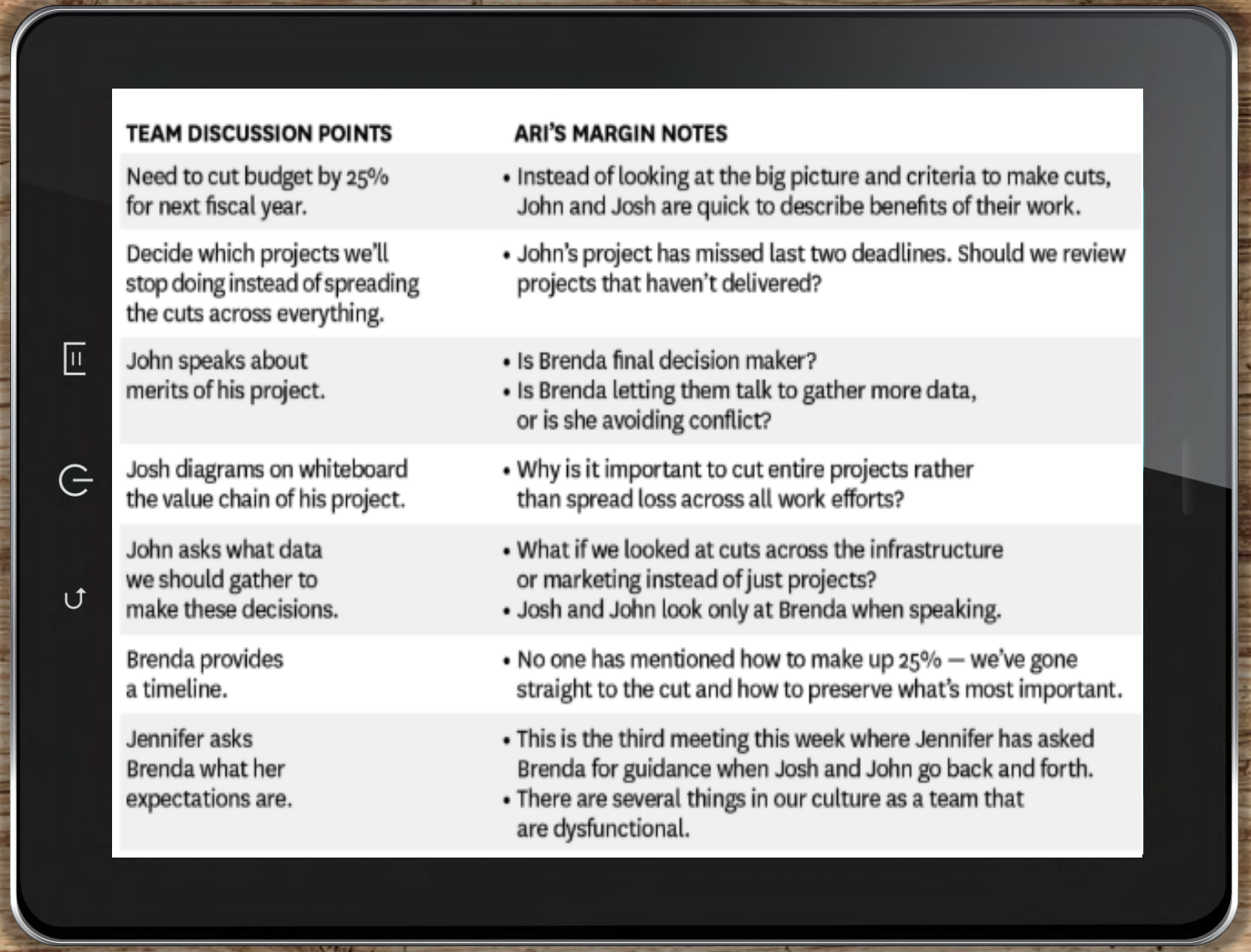
- What is your role? Is there a designated note taker?
- What is the setting?
  - ✓ Who are the key attendees?
- What are the objectives and goals of the meeting?
- What are the agenda items and key topics that might come up in a meeting?

Preparation

- Decide on format, structure and technique

Making the Most of Margins

Margin Notes



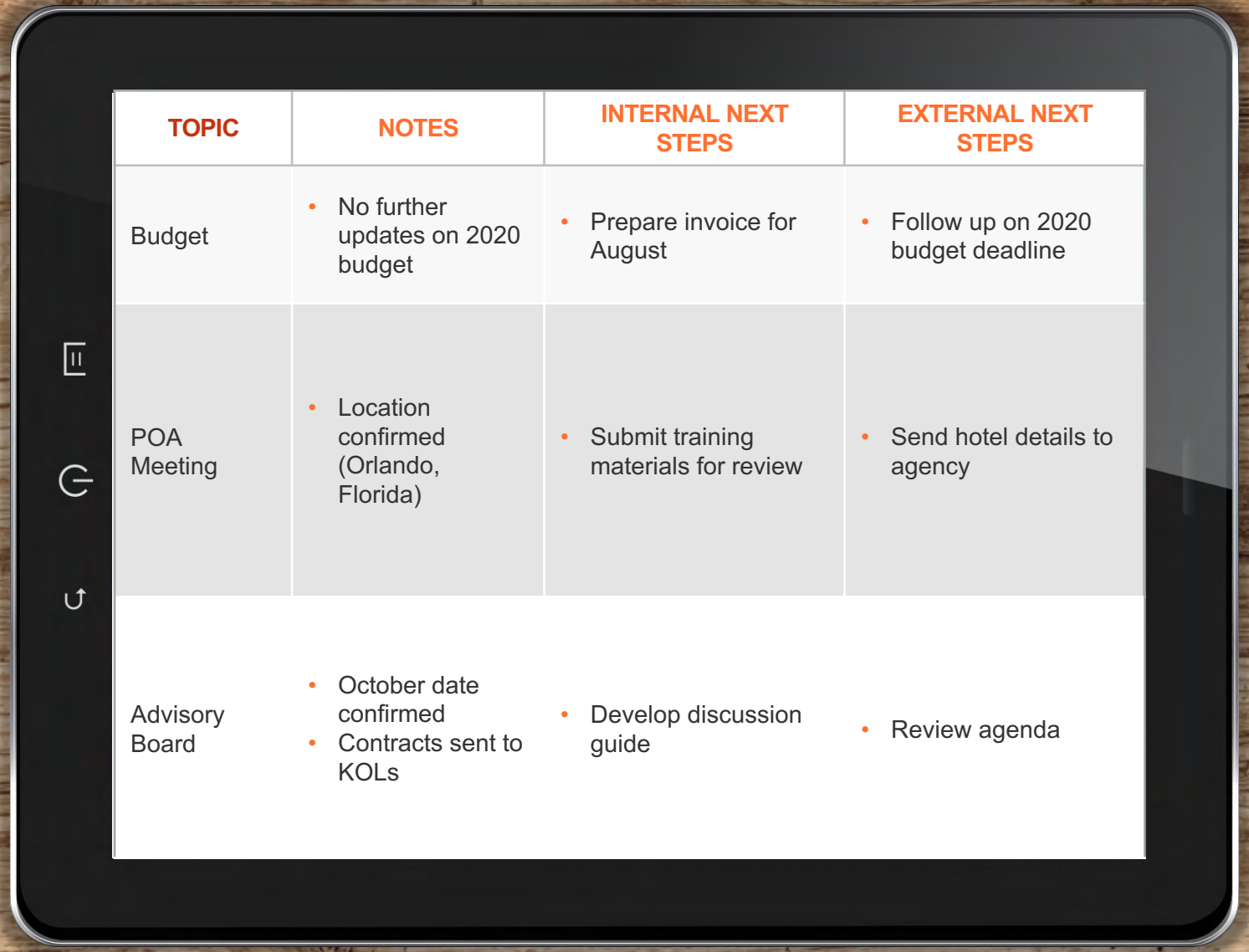
TEAM DISCUSSION POINTS	ARI'S MARGIN NOTES
Need to cut budget by 25% for next fiscal year.	• Instead of looking at the big picture and criteria to make cuts, John and Josh are quick to describe benefits of their work.
Decide which projects we'll stop doing instead of spreading the cuts across everything.	• John's project has missed last two deadlines. Should we review projects that haven't delivered?
John speaks about merits of his project.	• Is Brenda final decision maker? • Is Brenda letting them talk to gather more data, or is she avoiding conflict?
Josh diagrams on whiteboard the value chain of his project.	• Why is it important to cut entire projects rather than spread loss across all work efforts?
John asks what data we should gather to make these decisions.	• What if we looked at cuts across the infrastructure or marketing instead of just projects? • Josh and John look only at Brenda when speaking.
Brenda provides a timeline.	• No one has mentioned how to make up 25% — we've gone straight to the cut and how to preserve what's most important.
Jennifer asks Brenda what her expectations are.	• This is the third meeting this week where Jennifer has asked Brenda for guidance when Josh and John go back and forth. • There are several things in our culture as a team that are dysfunctional.

Bringing the Classroom to Work

Cornell Note Taking Template

Draw it Out

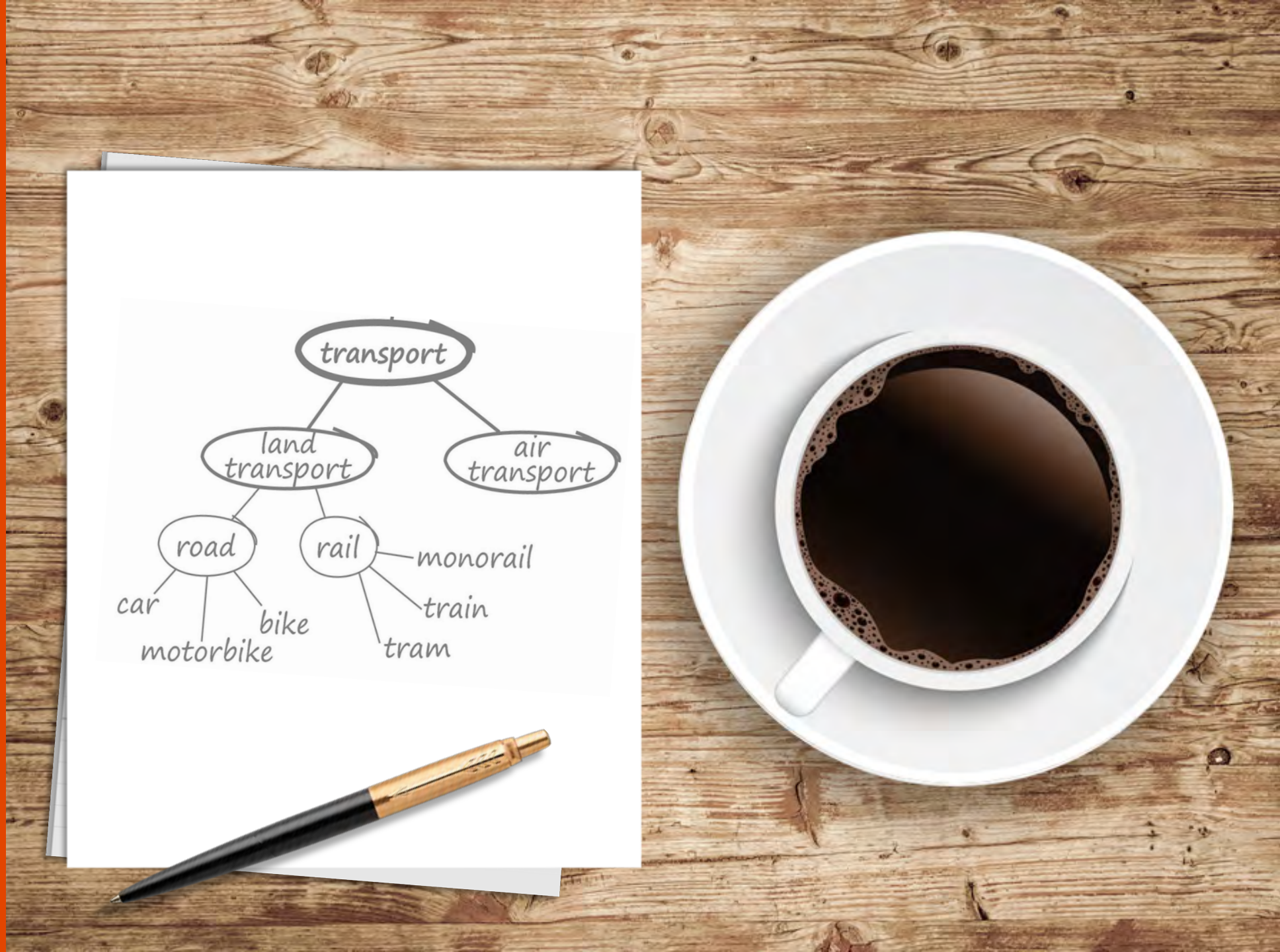
The Charting Method



TOPIC	NOTES	INTERNAL NEXT STEPS	EXTERNAL NEXT STEPS
Budget	• No further updates on 2020 budget	• Prepare invoice for August	• Follow up on 2020 budget deadline
POA Meeting	• Location confirmed (Orlando, Florida)	• Submit training materials for review	• Send hotel details to agency
Advisory Board	• October date confirmed • Contracts sent to KOLs	• Develop discussion guide	• Review agenda

Mapping Your Mind

Mind Maps



Capturing the Conversation

Active listening

Focus on key points

Keep your notes organized

- Down times during the call can help self-organization
- How are you extracting the notes?

Think ahead

- Think about the flow and template

Synthesizing the Information

Compiling and summarizing

Timing

Distribute notes

- Email or word?
- Internal or client-facing?

Key takeaways and next steps

Format

"Use as few words as possible to get your point across"

Questions?

Sources

1. McGloin M. What You Miss When You Take Notes on Your Laptop. Harvard Business Review. https://hbr.org/2015/07/what-you-miss-when-you-take-notes-on-your-laptop. Published December 5, 2017. Accessed July 18, 2019.
2. Nawaz S, Gallo A, Schwarz R, Saunders EG. Become a Better Listener by Taking Notes. Harvard Business Review. https://hbr.org/2017/03/become-a-better-listener-by-taking-notes. Published September 20, 2017. Accessed July 18, 2019.
3. The Cornell Note Taking System - Effective and Efficient Note-Taking. Mind Tools. https://static1.squarespace.com/static/5be3c12b1aef1dffe206c9b1/t/5beee4860e2e7239fa76fe7b/1542382726966/The Cornell Note Taking System - Effective and Efficient Note-Taking.pdf. Published June 14, 2016.

Thank You!