NOTE TAKING

EQUANIMITY.COACH

Quick Note-Taking Strategies for Capturing Key Points

When brainstorming or filling out tools like a cause-and-effect diagram, the goal is speed and completeness—don't edit for perfection mid-session. Focus on jotting ideas as they come, then refine later. Here are tailored suggestions:

1. ***Choose Your Method Based on Context***

- **Bullet Points or Lists:** Fastest for linear capture. Use short phrases (e.g., "Training gaps → skill frustration"). Indent sub-points for hierarchies (e.g., main cause → why? → evidence).

- ***Mind Mapping:*** *Great for visual thinkers. Start with the problem in the center; branch out categories (People, Processes) and sub-causes. Tools like pen/paper or apps (XMind, MindMeister) work well.*

- **Cornell Method:** *Divide your page into sections: Notes (main area for points), Cues (left column for keywords/questions), Summary (bottom for quick recap). Ideal for structured sessions.*

2. ***Speed Tips to "Get It Down"***

- ***Abbreviations & Symbols:*** *Shorten everything—e.g., "Env: toxic cult" for Environment/Toxic Culture; use → for cause-effect, * for priorities, ? for uncertainties.*

- ***Voice-to-Text:*** *If digital, dictate via phone apps (Google Keep, Otter.ai) during group talks. Review for accuracy right after.*

- ***Time-Box It:*** *Set a 1-2 min timer per category to force quick dumps—avoids overthinking.*

- ***Capture Non-Verbals:*** *Note speaker names/emojis for tone (e.g., "HR: 😒 on schedules").*

Equanimity Coaching LLC. | Equanimity.coach | dee@d.coach | 810.919.3121

3. ***Tools for Efficiency***

- ***Analog:*** *Sticky notes on a whiteboard—easy to group/move. Or a dedicated notebook with pre-drawn templates (e.g., fishbone grid).*

- ***Digital:***
  - ***Notion/OneNote:*** *Embed tables for prioritization (e.g., columns: Cause | Impact | Fix Idea).*
  - ***Obsidian/Roam Research:*** *For linking ideas (e.g., tag #People for quick search).*
  - ***Google Docs/Slides:*** *Real-time collab for teams; use speaker notes for hidden details.*
  - *Pro Tip: Always duplicate your raw notes into a "refined" doc post-session for cleanup.*

4. ***Post-Capture Polish***

- *Review within 24 hours: Highlight top 3-5 points per category.*
- *Quantify where possible (e.g., "70% survey said…").*
- *Share for feedback to fill gaps.*

These keep you in flow mode—aim for 80% capture now, 20% polish later. If this is for a specific session (e.g., team brainstorm), share more details for customized tweaks!

Brainstorming & Writing Directions for Cause-and-Effect Analysis

Building on your cause-and-effect form and note-taking setup, here's a streamlined guide to brainstorming (generating ideas quickly) and writing directions (crafting clear, actionable instructions). This keeps the process collaborative and focused—ideal for team sessions or solo refinement. Aim for 20-30 minutes per phase to maintain momentum.

NOTE TAKING CONTINUED

EQUANIMITY.COACH

Phase 1: Brainstorming Techniques (Idea Generation)

- ***Focus on quantity over quality first****—capture wild ideas without judgment. Use your notes from earlier as a springboard.*
- ***Freewriting Sprint:*** *Set a 5-min timer. Write nonstop about the problem (e.g., "Why does turnover happen? Training sucks because…"). No editing; let it flow. Review for gems.*
- ***Round-Robin Prompts:*** *In a group, go around the circle: Each person adds one cause per category (People, Processes) in 30 seconds. Pass a ball or use a digital timer. Record via voice notes if remote.*
- ***Reverse Brainstorming:*** *Flip it—brainstorm "How to worsen the problem?" (e.g., "Fire everyone randomly"). Then reverse to fixes (e.g., "Hire thoughtfully"). Uncovers hidden angles.*
- ***SWOT Tie-In:*** *Map to Strengths/Weaknesses/Opportunities/Threats. E.g., Weakness: "Outdated software" → Opportunity: "Budget for upgrades."*
- ***Pro Tip:*** *Use a "parking lot" for off-topic ideas (e.g., a side column in your notes) to stay on track. Target 10-15 ideas per category.*

Phase 2: Writing Directions (Structuring & Clarifying Output)

Turn raw brainstorm into polished directions—concise steps for the form, actions, or reports. Make them SMART (Specific, Measurable, etc.) to guide implementation.

Template for Directions:

1. ***State the What:*** *"Address [Cause] by [Action]."*
2. ***Explain the Why:*** *"This reduces [Effect] because [Evidence from Brainstorm]."*
3. ***Detail the How:*** *"Steps: 1) [Task], 2) [Task]. Tools: [e.g., SurveyMonkey]."*
4. ***Assign & Timeline:*** *"Owner: [Name/Role]; Deadline: [Date]; Metric: [e.g., 10% improvement]."*

Example for "High Turnover":

- ***What:*** *Address training gaps by rolling out quarterly workshops.*
- ***Why:*** *70% of exits cite skill frustrations (from exit surveys).*
- ***How:*** *1) Survey team needs; 2) Partner with external trainer; 3) Track via post-session feedback.*
- ***Assign:*** *Owner: HR Lead; Deadline: Q1 2026; Metric: Increase satisfaction score by 15%.*

Clarity Hacks:

- ***Active Voice:*** *"Implement reviews" vs. "Reviews should be implemented."*
- ***Short Sentences:*** *Max 20 words. Bullet for steps.*
- ***Visual Aids:*** *Embed your fishbone sketch or a simple flowchart (e.g., in Canva: Cause → Action → Outcome).*
- ***Iterate:*** *Read aloud—does it flow? Get a peer review.*
- *Integration with Your Form & Notes*
- ***Link Back:*** *In your cause-and-effect form, add a "Directions" column next to prioritized causes. Pull from brainstorm notes (e.g., tag #Action in your digital tool).*
- ***Common Pitfalls to Avoid:*** *Overloading with jargon (define terms); Ignoring feasibility (rate ideas 1-5 on effort/cost during brainstorm).*
- ***Next Steps:*** *Schedule a 15-min "bake-off" to vote on top directions. Track progress in a shared doc.*

This combo turns chaos into clarity—brainstorm for creativity, write for execution. If this is for a specific scenario (e.g., project delays) or you want examples in a template, drop more details!

Equanimity Coaching LLC. | Equanimity.coach | dee@d.coach | 810.919.3121

NOTE TAKING RETAIN THE MESSAGE
EQUANIMITY.COACH

PAGE _____OF_____
DATE OF CONVERSATION ___/___/_____
TOPIC____________________________

KEYWORDS OF CONVERSATION	DESCRIPTION OF THE CONVERSATION