122-note-taking-methodologies-productivitycast

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V **Voiceover Artist** 00:00

Are you ready to manage your work and personal world better to live a fulfilling productive life, then you've come to the right place. ProductivityCast the weekly show about all things productivity, here are your hosts, Ray Sidney-Smith and a goose open out with Francis Wade and art Gelwicks.

Raymond Sidney-Smith 00:17

Welcome back, everybody to ProductivityCast, the weekly show about all things personal productivity. I'm Ray Sidney-Smith.

A **Augusto Pinaud** 00:23

And I'm Augusto Pinaud.

F **Francis Wade** 00:24

I'm Francis Wade.

A **Art Gelwicks** 00:25

And I'm Art Gelwicks.

Raymond Sidney-Smith 00:26

Welcome, gentlemen, and welcome to listeners to this episode of ProductivityCast. Today, what we're going to be doing is starting kind of an ongoing conversation we're going to have over

we're going to be doing is starting kind of an ongoing conversation we're going to have over the next few episodes on notetaking. And what I thought we would do today, what I thought we could have a conversation around is really the the note taking methodologies that we know of, and use and kind of go from there. So let's start off with some of the most popular note taking methods that are out there. And then we can kind of touch base on what we use, how we've used them in the past, and maybe some pointers in terms of how people can bridge the gap between the hybridization of notetaking, which is that people have to toggle between paper and digital so often today, even though they don't realize it because we get a lot of paper in our world. And we take digital notes many times, but yet we actually don't make them actionable. And I think there's this balance between making things, reference and action. And I'd like to have a conversation about that as well around these the baseline methods that I know of like outlining, the Cornell note taking method, there's mind mapping, there's just unstructured note taking. There are many other ways in which we can take note taking, where do you want to begin in terms of note taking methods that you know about, and you'd like to discuss?

A   Art Gelwicks 01:52

Well, for me, it's a pretty straightforward one, I'm an outline guy. I love outlining, I use outlining that's, that is my fallback method, I find constantly doesn't matter what tool I'm using, I'll find myself creating outlines for organizing and moving through content. Mind Mapping is probably the counterpart in my mind to outlining, because it's that freeform structure, which outline limits a little bit, but I don't think, too, not to an extreme. But both, interestingly enough, translate just as well analog to digital, I can do them in both platforms. But also I found that they define the tools that I'm going to use. Because if I go into use a tool for note taking or try one out, if I don't have an easy ability to generate an outline in the tool, the tool is much less attractive to me, I have much less desire to use it. And even beyond that, to be able to get the content out of the outline to other tools, say from an outline into a word processing document, I have to be able to do that. So it still becomes that common denominator. It's the the one note taking method that I don't have to think about. It just naturally happens for me.

    Raymond Sidney-Smith 03:15

So can you explain for listeners what you mean by outlining? What does the hierarchy of the content look like? How do you structure your outlining method?

A   Art Gelwicks 03:23

It's it's interesting, because there are very formalized structures and outlining you can you can look up specific approaches to how to create outlines, numbering structures and things like that, for me, it's really just a matter of relevance of relationship of content to each other. And then creating a progressive structure. One of the problems with outlining that people will run into is, especially if you do it on the analog side. As you start to capture the outline, it feels like it's being locked into place, you know, you've created a top level topic, you've captured sub items underneath that topic. And you may have captured additional details under those sub items, and so on and so forth. When you're dealing with that on an analog platform, you know, if you're taking it on a legal pad, it can be challenging, because if you need to go back and put something in the middle of that, functionally and physically, that platform doesn't allow you to do that easily. On a digital platform. It's much easier, you can backtrack and you can interject it

in. But what I find outlining is at its best is a way of providing context relevance between topics that you're dealing with, whether you're taking notes from a book, you're going through and capturing information during a meeting. You're planning out a project. It's a great way to provide that structure. For two methods that I use. One is lots of levels I Ness things deep. I mean I will drop things in I'll have a question and then underneath that I will address additional answers. If I have, there's a statement that's made, and I have my own thoughts about it, well, I'll drop in sub items under that, that show mine. Because that in the digital space gets coupled with collapsing and expanding, most good tools will give you the ability to collapse and expand an outline to its various different levels. And that gives you an ability to refocus your thinking, but also reorganize the content easily. If you look at tools, I use OneNote all the time. But there's another great one called workflowy, where you can collapse down to a top level topic and then move that around in your outline structure to reorganize it and get get your thinking more structured. So formal outlining methods, I think that's one of the things that scares people off from outlining is they think back to school, and they go, Okay, this is what I had to do. And I had to have a Roman numeral here. And I had to have numbers underneath and lowercase letters under. And that if I didn't have that structure, right, it wasn't correct. Now, that's a bunch of baloney. You can do whatever you want. You can do colored dots, you can do emojis, you can do numbers, you can do letters, you can do bullets, I'm a big one for doing bullets. If I have no reason to have a sequence for the things under an item, if there is a logical sequence, I'll use numbers or I'll use letters. But if there isn't a sequence, I just need to indicate that these are slightly different than the ones above it and the ones below it. So structurally, it's relatively simple. I mean, it's exactly what we define. We just can't overcomplicate it. And I think that's one of the hang ups with outlining is people get that PTSD from elementary school, or middle school, in this case, of trying to figure out how to structure it just right, you don't have to worry about that just write this stuff down,

Raymond Sidney-Smith 06:49

I find that I, I spend most of my time using the outlining method, when I'm taking notes in meetings. If the content is highly structured, I find that outlining is best for me, because I can, you know, bullet, or 123 or Roman numeral one, number one, A, and I can follow the line of whatever that is that tends to be in an educational environment where I'm consistently taking an online course or I'm studying something online. And that gives me that conceptual framework for being able to follow and take notes along with those items, I tend to feel like this breaks down for me very quickly for being able to review and understand the notes when there isn't a structure or a flow to what is going on. So a meeting has an agenda, a seminar or workshop, the webinar or whatnot will have will have a syllabus, and I will be able to follow along with those things. If it doesn't have that, then that's where the outline method really breaks down for me. So just so that people have an idea that you know, you can, you can utilize or not utilize structure here, and that can be useful to you. Let's move on to mind mapping since art already brought it up. Mind Mapping is probably my favorite and preferred way of really capturing in general in a freeform fashion when it comes to brainstorming, or even sometimes collaboratively working with people so that they can structure their own thoughts. Many times people have difficulty structuring their thoughts. And so for those who don't know what a mind map is, a mind map is a freeform visual note taking method, whereby you create a parent thought, and that parent thought is usually in the center of a page. But it doesn't have to be but it becomes what we call a central thought. And then you branch off from that by drawing attachments to it. These are considered child thoughts. Child thoughts can then also have child thoughts very similar to a family tree, where a family tree continues to have branches and branches have children and child thoughts across the various branches of the

family. Well, the mindmap gives you this freeform capability of doing so. So you can keep kind of branching off and branching off into really infinity. And in especially in a digital tool where you could potentially do that ad infinitum. Where in paper you might be limited. But it gives you the capability of using creative capacity in terms of colors. You can draw concepts as opposed to just writing words, you can create bilateral relationships. But heck, you can create trilateral relationships if you wanted to. You could create as many relationships to different things just by drawing arrows to them, and really doing some flexible forms of notetaking here. What are your experiences with with mind mapping and where do you see mind mapping in your world? And how does it help others?

A Francis Wade 09:46

I've been mind mapping since I was a teenager, and I ran into the book that described the Tony Buzan book. I picked up the book from my father's bookcase. He didn't use the method but he had this book. So I read this book, The, I saw where someone had mindmap a topic like physics or chemistry or one of those scientific topics that I happen to be studying at the same time. And it laid out beautifully, this whole hierarchy of thoughts and ideas and principles. But the part that really got me was that it said, this was done by a 16 year old, I took 15 minutes. And it said that, this, this is not an A student, this is like a B student, an average student. And I thought, Oh, my God, this is awesome. And I started back then that's a 1617, I started the mindmap everything. And my father never got into it, he didn't seem to be so interested. But at some point, I stopped doing it for a couple years, maybe doing University and then picked it back up. That never stopped since. And I concur with all the benefits that you, you describe it, it's a freeform, nonlinear way of thinking. And it always works better for me than trying to make a list, or using any other method in terms of individual brainstorming, and also organizing my thoughts because my thoughts don't come in. Like most people, I guess, they don't arrive in this linear format, kind of be hand delivered to me by the gods. They come in, you know, gyms and jobs and bits and pieces, and they're all over the place. Not terribly, but when I'm brainstorming, they're not coming in a linear fashion. So mind mapping allows me to explore this, not just the words themselves, but also the relationships between concepts. This is what you're talking about these lateral connections. And those connections are, for me, almost impossible to make in a list. They're very hard to make, but then a mindmap, they flow quickly. And also, they spur off other ideas. So I use Evernote to take an individual idea down to its depth, so to speak. So I would, I would use a mind map first and then take the idea from a mind map and turn it into something else. But the mind map is where all the juice comes from. That's the that's the exciting part. That's the that's the part I can't predict. And that's the part that it's not become part of all them, it's not become a habit, that's the only one I really use on a daily basis on a regular basis.

A Art Gelwicks 12:38

Yeah, my mapping for me is the tool when it comes to any sort of creative work, if I have to do anything that I'm brainstorming or doing ideation work or anything like that, Mind Mapping is it because that visual representation of all this jumbled thought that I have going on at any given time and being able to create relationships and, and move things around and work almost in a tactile space. go so far to helping that process move through. And you're right, capturing that in an outline structure becomes difficult because you have this artificial construct around it. Whereas a mind map is whatever you want. Now, the downside that I found with Mind Maps is

is they're very difficult to translate for other people. handing your own mind map over to someone else takes a lot of translation for them. And it's actually one of the reasons why I like the tools I do because the mind mapping tools I use spit out outlines. So you know, it logically translates that and then into a word processing application. So But mind mapping absolutely anybody who has Well, I don't even want to say just creative work. If you are even remotely visually focused in your learning and your operation and in the way you interact with things, you're doing yourself a major disservice by not at least looking into mind mapping

A Augusto Pinaud 14:06

mind map is probably my first line of defense for thinking for taking notes I there is interesting because there are things I like about other methodologies that we will cover like the BuJo not for processing but not for thinking but for after an organized those and being able to search and but mind mapping is for me the main tool of thinking because doesn't you mentioned earlier about structure of meetings, I will say 80% or 90% of my meetings lack that structure. You know we have people jumping left and right and no really I structure where outline will be completely useless for me, but where mindmap instead it is skiing credibly useful because I can jump from arm to arm an open new ones and for me the initial captures always a mind map and Then from there in the organization and the processing of that, it's what it turns into an outline. But yes, my map the ability to add images, colors, there is a lot of studies about even the colors. And when I coach clients on this process, and I told teach them, you know, the mind map, I teach them change colors during the meeting. And before I, I do all this in their iPad, you know, when I used to do it bring markers and blank notepads to meetings and people look at you like, are you insane? Yes, I am. But my notes were not bad, because the change of the color immediately make you think on other things. And again, there are a bunch of studies on the colors, you know, green means money, Orange means trust, and things like that. So as you are doing this process, if you have never used colors, play with them, you will find your favorites. And he's just want to track your way of thinking. But he's incredible useful when you add the colors to those mind maps.

A Art Gelwicks 16:02

Yeah, if you ever want to see a visceral reaction to something, take a mind map tool, put it up on a projector in a meeting, for the first time that an audience has ever seen it. And where it has like the central bubble of what the idea is, and then just start building the mind map in real time as you're talking through this. And you'll you'll just, it's amazing the way people react because there's like, What the heck is this thing? This, I, it's I'm so intimidated. But I'm so amazed. You know, that's the kind of reaction you get. And some will actually dig into it. But they realize that there are different ways to doing things. And this is about as different as you get in, in my book when it comes to note taking. This is that far end of the spectrum of highly visual, highly interactive type of structure, unlike you know, something all the way on the other end, like the Cornell notes or something like that.

A Augusto Pinaud 16:53

My experience was mind maps and big meetings is doesn't work because a lot of people get distracted and intimidated by how fast team can grow during bullets, people don't feel that. So I don't use it much for large meetings. But what when you can get into small settings, or even

just taking notes. It is incredible. And what I have done over the years, is I take the notes into my mind maps. And then when I process that, then I share the outline. And that has provided me a better experience and tried to do the mind my life.

A   Art Gelwicks   17:32

Yeah, I will do it live specifically when I'm trying to get people to change how they're thinking. If I found that with an ideation exercise, if they've gotten themselves into a linear path of thinking, or in worst case, they're thinking about the well, we've tried this before, and it won't work mindset, I found mine maps are a great way to break that. Because it gets them away from that traditional thought process. And it says okay, but you haven't thought about this way. Let's flip this on its head. And it is a struggle at times, I'll admit some people don't react well to it. I mean, they look at it, and they feel overwhelmed, and they feel confused. And it because they like that structure, they think that structure is going to lead them to an answer. And they don't realize that mind mapping is one of those tools that can that you can thrive in chaos with that you can go through a session, you can go through, you know, hours of thinking about something and come up with something completely different than what you had any inkling as to what you were going to do. And that can be very liberating. And it can be very intimidating. So it takes some time, you have to ease into it. But once you cross that threshold, I think it's something it's definitely worth being in your toolkit,

Raymond Sidney-Smith   18:48

talking about toolkit, some of the features that I really like in mind mapping tools that are really useful, are in multiple tools. But you know, you can choose the mind mapping software of choice. But I'll give a few things here that I like that you should look for when you're trying to find a mind mapping tool. One is sharing and collaboration features. So many times you want to be able to collaborate and or share a mind map and ones that allow you to do either real time collaboration or at least sharing that mind map so that you can send it to someone have them work on it and send it back to you. I really like ones where you have a central tool where you can share the same mind map and work on it in a web environment. And so import export features are really really important to your point art earlier about being able to throw the the mind map into say workflowy see it in a in an outline format, and then export it again and see it in a mind mapping format. I use that all the time. I translate between one mind mapping tool and another so that those import export features are really important. The ability to link a thought in a mind map to another mind map is really really powerful. And I use this all the time so I have a Master Mind Map And then we'll have other Mind Maps linked from that Master Mind Map to those others. And that allows me to keep my mind map in a manageable size. while still being able to jump quickly to those thoughts that are full mind maps themselves, or being able to have iconography and digital mind maps. Obviously, if you're using paper and pen to mind map, you don't need to worry about iconography, you can just, you know, use your your drawing skills at that point, but certainly being able to do iconography, and then some mind mapping tools, like the brain, the personal brain, mind 42, and otherwise have task tracking capabilities directly inside of the mind mapping tool. And that can be very powerful. If you want to implement say, on the Getting Things Done methodology or any number of systems directly inside of your mind map, you can then do that if you can track tasks associated with a specific thought. So these these tools have various features. And those various features can actually assemble an entire system. I know many people who run their entire productivity system inside

of a mind map digital in this particular case, but I don't see myself doing that necessarily, unless the mind mapping pool had some pretty sophisticated connectivity pieces. But I guess, you know, the brain probably could do those things. So just for people to have an idea that these these features do exist, and they're capable of being done. So let's move our way from them. Our survey now our little, you know, kind of narrative of note taking methods from then mind mapping, which is unstructured, to the highly structured, which is, as art noted earlier, the Cornell note taking method, who wants to give us a a light overview of the Cornell note taking method. And since one of us actually went to Cornell, and the rest of us didn't. Maybe he wants to educate us on the Cornell note taking method for GE putting you on the spot,

F Francis Wade 22:00

hate to disappoint but there was no, there was no note taking method when I was at Cornell. I heard about this years later. Like what we didn't barely had laptops or computers back there that but it's a paper based method. But that's really all I know, because I didn't come across it until years later. And I was like, Well, I guess I must have missed that class.

Raymond Sidney-Smith 22:22

So it's actually quite simple. Cornell note taking method, in essence, has you split a page into five parts, the five parts are the top of the page has a title. So you're giving the subject of say the lecture in this case, because Cornell note taking method was obviously developed in an academic environment. And so you have kind of the title of the page, then you have date. And then in two parts of the center of the page, you in essence, have 30% of the page, which covers your kind of keywords and questions that you have alongside the event. And then on the right hand side, you have your main notes and other key thoughts that you're tracking along against those keywords and questions. In essence, you're kind of creating a table of contents, and questions in the margin on the left hand side, whereby you're answering those questions and taking any main thoughts associated with that on the right hand side. And then below on that page is kind of that fifth section, or fourth section, if the title and date are kind of the same section, then it's really four parts of the page. But that main section at the bottom is a summary. And what you're doing is is that you're tracking keywords and questions, and then taking notes during the primary portion of the lecture or seminar or meeting. And then below is the summary. And you spend kind of some time at the end of the lecture, to capture those thoughts that you had summarizing what happened during the event. And so you're tracking and maintaining during the event, and then afterward, you're actually taking some time to go ahead and process your own summary at the end. And I would presume that in a meeting environment, you would be doing that before the meeting ends because you would want to be able to track actions and who was responsible for those actions and so on so forth. Does anybody have experience with the Cornell note taking method and what are your thoughts on it and where would it help people the

A Augusto Pinaud 24:21

most? For me, I don't remember when I discovered the the paper the paper was the first thing I discovered okay the line and the line and and that was my first at least formal thinking notetaking way and to this day, if I'm not going to do even if I do mind maps in paper, okay, I

crossed the line so I can put the easy to recall things on the side. That was for me, something that really change my notes because my handwriting is awful and has always been awful. And he's only going to get worse. That's my decision. And I was really fast taking notes in graffiti on the palm pilot. So, and because of the search capability, I never really consider improving. Then later on as they grow, and I started taking paper notes, they were awful and completely useless. So I needed a way because mostly typing on my trio was not that well seen on on the work in place I was at the time. So that's when I started looking other methods when I discover the Cornell Method and the paper and the ability that I can have all those meetings, come back, and really get a good understanding of the actions or whatever questions or the things that are critical for me out of that, it was really a game changer. So I see a lot of people taking notes of notes of notes of notes on being much better note takers than what I am on a meeting. But sadly, the notes get there, I see those notes not get processed. And I don't process mine most of the time. But because the Cornell Method, I can go and pull out in five seconds, what was critical for me and what needs to be critical for me. So if I ever need to come back, I can. And that was for me a game changer.

A **Art Gelwicks** 26:28

Yeah, I tried the Cornell Method probably like four or five times off and on. Typically, I have retried it. Anytime I've wandered into like a staples, or an Office Max and found a pre printed Cornell legal pad, like, oh, wait, maybe this will let me know. And just, again, this is one of those things that I found that everything that it offers me, I get through my normal process of outlining in that structure. So it doesn't really help me any that said, I can, I can absolutely see how this would resonate with some people structurally and content wise, because you have the basically the freeform content, and then summarizing it. And then actions and takeaway items, same types of things that I put into my outlines, it's just a different layout. And it, it will probably resonate more directly with people, I just, it doesn't click with me, I've tried.

F **Francis Wade** 27:24

Is there a version on the corner of the method for meeting not minutes, but kind of the the person who's taking notes for him or herself in a meeting, as opposed to a lecture?

A **Art Gelwicks** 27:37

Yeah, you could certainly use it for that it would be easy enough to do because of how it structures out. Even if you just take that physical layout, even on a digital device, if your handwriting on a digital device, you have your bulk notes. And then you could have the left column being what your actual takeaway items are, or direct action items and things. So that way, you don't have to read through the notes to get to those things. The summary at the bottom, the only thing that I have found, and I guess this is this is kind of me, my notes tend to be very verbose at times. So I go on for page and page and page. I mean, if it's, it's an active meeting, I can have seven 810 12 pages of notes without any problem. Well, that structure that doesn't really lend itself to that kind of infinite note taking. It has an end on every page, and you feel almost like, Okay, I need to summarize this page, it's that artificial construct that that forces me to think in a particular way. And that just, if I were going through and doing, if I were going through and doing, say, a breakdown on a book, I think this would be great. It would be

an easy way, because then I could say, Okay, this page is for this chapter. And then here's the structure. Here's the takeaways, here's the summary of the chapter, we'll move on to the next one, that would be probably extremely useful. But for something where I don't know what the structure is, and then I'm going to try and fit it into this, I'm always going to feel like am I doing this right?

Raymond Sidney-Smith 29:09

I find the Cornell Method to be just too limiting in the way in which I track data just generally. Now, if I had a very clear understanding of what the content was going to be during a lecture or seminar during a meeting, that would be great. But I'm with you art, I just find that the limitation on the singular page structure, if there was a tool, perhaps where as you took notes, the it kind of flowed downward without you having to worry about that. Now, you could do that I suppose in OneNote, as well as an Evernote where you created a table, and then the table just basically tracked content down the center. So you, you could infinitely keep moving yourself down in the center. You could do that.

Art Gelwicks 29:51

And I have done that in OneNote. I have done situations and it's kind of an inverse Cornell layout where down the left side is the actual live notes for the meeting. On the right side, because you can create text boxes within it, you drop a text placeholder. And then I put my action items in there and you know, reminders for next meeting. So I create this. It's not a quadrant structure, but it does provide that similar framework of saying I need to call out action items. But I think that's probably the bigger benefit. And to me, that applies to all these tools that we're talking about. There are common requirements across all of them, there are action items that you want to capture things to follow up on relationships between other notes, those are uniform, regardless of the physical structure that the note taking system is imposing on what you're doing. And those are universal, we have to be able to do that for these notes to be able to be useful. So whatever you're looking at whatever tool or methodology, you need to be able to do those core things, you know, identify those relationships, create deep links, be able to have takeaways segmented out of your notes in an efficient and effective manner. And as long as the tools and the opportunities or the tools and methodologies you use, provide that, then it's just a matter. Are you comfortable with the mechanics?

Francis Wade 31:13

I find that my, I think my approach has changed over the years because I'm, I'm no more concerned about what am I using the information for? So it's like it, I think I've become more stingy around my note taking, because I'm only I'm not going to take notes for the sake of taking notes any longer. I think I think I've sort of cut that out of my repertoire. But so the question I'm asking is, what's my motive. And if the motive is, like, for example, the meeting, I questioned the Meet the purpose of many meeting minutes, simply because I've been in meetings where they've captured lots of minutes. And in the next meeting, nobody can remember what they were supposed to do, because they didn't capture the most important thing, which is, what are you supposed to do, or they buried it in the minutes and the minutes that come out the day before the meeting the next meeting, which means that nobody could

act on what they're supposed to. So in that context, it's more important to, as soon as an action item is created, is to send it out to the team, either through something like telegram or WhatsApp is to immediately put it in existence. And that's more important than taking the notes or taking the minutes is to get it, get it get it into a place where everybody can see it. And the owner can know that I'm not being watched, because I know have that action item. So that's one example.

Raymond Sidney-Smith 32:46

I think, I think the idea of the Cornell Method, I think needs to be immediately modified to your own needs. If you're if you're not an academic setting, I think if you are a scholar, or if you're a student, and you're in an environment where you're taking a lot of notes, and they are structured, I think the Cornell Method works. Again, now that we've talked it through, and I think oh, well, yeah, you could probably do this in an Evernote note in a table and kind of structure it for kind of a free flowing center section that could really work create a template, or there's probably a template in the Evernote template gallery. And then you'd be able to then track those notes. For me, I just really don't see the need for the separation between these main content, ideas and questions. So like that whole main content area, we're capturing thoughts, and so on, so forth. Going well, kind of jumping into our next kind of thought, which is the sentence, note taking method, sentence structure method, which is what you're really talking about art, when you say that you're taking pages and pages of notes, you're really probably just, you know, writing out those thoughts, and probably not full sentences, but semi full sentences or whatnot. And for me, I actually started my younger academic world, all doing that method, I would, everything the teacher said, I would then summarize in my own words as full sentences. And so I was interpolating in a way everything that was being given to me. And I thought that somehow that was helping me. And at some point in time, I recognized that I had just, I don't know, just a better memory related to this information. I don't know what it was. But I realized that writing all of that stuff down really did me no good. And so I then started to move to sentence fragments, where every line would just be kind of sentence fragments of the key ideas or points that were triggered. And I found that actually then became the non miss for me, because by the time I was in middle school, high school, I would take down these kind of thoughts throughout the notes, but none of them really stuck for me in terms of being useful and So then what I started to do was, instead of actually taking notes in terms of what the teacher was saying, or professor, I was then taking down my own questions and things that were prompted by the discussion. And that actually started to really highly engage me in the material much more during the lectures. Because being the, you know, the type of student I was, I had already read the materials, I have already been very highly involved in my my classwork, before I ever got to the classroom. So the teacher wasn't teaching me anything new, necessarily, I was coming into it very prepared. And so my goal was to actually keep myself like paying attention to what the teacher had to say, in the classes. And so by, by going in this kind of question and response perspective, I was having a dialogue, kind of like a meta dialogue with what was being said in the meeting in the class, and in my own internal, you know, mind, and that was really, really helpful. So anyone who's kind of in that space, know that you can, you can keep yourself engaged in the conversation, even if you're not taking notes in the sense of like, taking down what the person is saying, you can still engage yourself in that way.

Art Gelwicks 36:13

Yeah, it's, it's really fascinating that you bring that up, because I find our I have found as I've

gotten older, and I take more notes professionally, I've moved from taking notes, for a factual record, to taking notes to have an internal narrative. So if I look at my meeting notes now, and just functionally, if you go through one of my outlines, you'll find there are sections in the outline that are in italic. Well, if it's in italic, that's me talking to myself, I'll ask myself a question, I'll put, you know, the opinion that I would send off to somebody or chat to a friend or something that goes into my notes. And why I'm doing that is because I'm giving myself context later on, when I go back to review this as to what my mindset was, when I was capturing that information, you know, questions that need to be answered, things like that those are all tagged and identified. But that internal narrative has become much more important on my note taking. And I don't know if it's because I'm getting a better sense as to the value of the notes for myself personally, for the understanding that I would not share this content with anyone else, therefore, it is mine. And I can make it whatever I want it to be and make it relevant that way. Or the fact that and I have caught myself this way quite a bit. I go back and look at notes. And I go, the heck was I talking about? What is that? And I found that a lot with a sentence, you know, short fragments, you know, take quick notes, then you go back and wait, I don't exactly remember what that is. So being able to go back and have that narrative with myself over time, especially on a topic that extends over time, I can see the evolution of the thinking. And it helps me quantify how did I get to a particular decision or recommendation? Not necessarily what the end recommendation was, but what's the logic behind it? How did how did that build? And was there a flaw in there, and can I fix that. So it's almost like a journaling approach. It's almost like a mini journaling within the notes themselves. But like I said, You got to be careful of that. Because if you're going to share those notes with anybody, you got to do some serious housecleaning,

F   Francis Wade 38:27

push for sure. If I hear a good idea, I'm not, I'm not capturing it for a good idea in the sense that it's, it's something I want to explore later. I'm not capturing it for the sake of certainly, I'm not going to take an exam based on it, I really don't care about my being able to recall it randomly, and even even do recall it. If I were prompted for a recall, I don't care about those needs. What I do care about is capturing it in a way that when I go looking for a topic, to write an article on which I need to do every two weeks on a schedule. So I have to for my column, I need to find an idea every two weeks. So I go through my list of things that I've captured in meetings. So the feed for that is being in a meeting or a call like this one, getting an idea and immediately putting it in a place where I can either transfer to my list of ideas or putting it directly in my list of ideas right away. So the purpose is if I'm following a process, and the purpose is very well defined and very clear for me. And if I hear something that's interesting, but I know I'll never write anything about it. I'll know I'll just let it go. Because it's not a part of my workflow, so I won't capture it. If I don't sense that I have a future need for it. I'm not capturing it just in case any longer. Just in case it shows up on the exam, I need to capture it. So I don't have an exam coming. So I agree with you, I think no, I'm in no way from the world of academia. And I'm focusing on the three things that really would move the needle from a one hour conversation. If I can find three things. It's

A   Art Gelwicks 40:19

it's something it's interesting, as we talk through this, it's making me think about a little bit. Do you guys think it's because the further we get away from our period of formal education, the more we shift from notes for memorization and recitation, and moving more into notes for

application?

F Francis Wade 40:43

Yeah, I have a suspicion that all over the world there are people taking minutes of zoom meetings, that they're also recording. And someone is asking, why are we doing that again? Because, you know, we're used to note taking, as in writing, and capturing and text. But, you know, the next generation coming up is they've got to be thinking, why are you writing everything? Oh, can't you just record it? Yeah, the recording and the transcripts,

Raymond Sidney-Smith 41:11

I'm going to push back a little bit on the notion that notes are not valuable in the sense that I have sat on a wide variety of boards, not only corporate boards, but also nonprofit organization boards, whether they be advisory councils or executive boards. And the idea of taking appropriate minutes with, you know, and following parliamentary procedure, in terms of those minutes, are actually incredibly important, both from the legal and regulatory compliance perspective. But also, in just recently, having a situation where two different nonprofit organizations fell into conflict over the fact that they took all of these notes, and then all of the notes from both of the organizations somehow disappeared, and the conflict ensued, right. And so it turns out that neither organization over the course of 20 odd years was really taking notes. You know, somebody was taking notes, quote, unquote, and, and unfortunately, the, the relationship, which is actually tied up with, you know, monetary situation was misunderstood, or just really never fully documented between the two organizations. And so, the pandemic has, of course, changed a lot of things. And it caused a conflict between these, this organization. And the, the thing that I would have really appreciated is if there was clear documentation in meeting minutes for what had happened, and how people had decided on things, so that we had a clearer understanding of how things move forward. Thankfully, I was a third party, so I was able to, you know, wag my finger, and then walk away. I didn't have to actually wait into the conflict. But the the, the goal here, though, is really in being able to understand what happened in the past. So that that can inform you in the present when, when memories fail us memory is not as good as you think it is. And frequently, memory is a is a story that we are telling ourselves in the present about the past, we consolidate memory. And so over time, what happens changes. Because, you know, many of us have this, you know, family folklore, and things of that nature. If you think about any of those stories passed along to you, by family, or otherwise, those things change. And the same thing will happen about how you experience, say, a professor's tone, or a lecturers tone, or somebody in a meeting, if I'm capturing that in real time, I can then say, You know what, Bill was, you know, neutral about the situation. So that after the fact when my memory says, Bill was really upset about, you know, the way in which we decided on that thing, in my head, I can go back to my notes and say, Bill was actually neutral. That's me applying that memory to it. It's not actually what happened. So I think there's a real value to tracking and maintaining, especially if you fall into those categories, where you have to recall information, that is not really important, all the time. But it's important in those key moments.

F Francis Wade 44:13

If that if that's, if that's the case, then the recording is a better place to go. If you really want to

if that if that's, if that's the case, then the recording is a better place to go if you really want to do that, but for what for the action items, the immediate deployment seems like a better putting it right into either email or right into some other tool, but it goes back to what's the purpose of the capture? Or what's the purpose of the the, what are you using it for? And I think that's the that's the that's where things are changing, because whereas the needs are all the same. Nothing has really changed with respect to what you need from a meeting and what you need from your notes. So the need whether it's to pass an exam or to get ideas for a paper or to hold someone to account for a meeting, that the end motivations are the same. It's just that we have way more choices now, with respect to how you how you capture that information, how you deploy it immediately do you deploy it immediately. And I suspect that it would free up lots of people's time who are in meetings, from doing things, like taking notes, because you don't know that the recording is going to be available, or there's no recording being done, that your written record is the only record. And if your written record is the only recommend there's no transcript and there's no record. And then your Note taking is really important. But if as you come to trust recordings and transcripts, and put some AI on it at some point and give you the highlights, or as you come to trust these other tools, they should free us up to do other kinds of creative things not not related to the task related to the meeting, that would then allow us to have better quality conversation, then I'm wondering,

Art Gelwicks 46:04

yeah, I found that I've shifted my note taking to also from when we think about articles and content, I mean, I'm constantly pulling stuff from feed readers and things like that, there was a period where I would have instinctively tried to read the article and take notes about it. And I don't do that anymore. Honestly, I mean, I use Instapaper as my primary consumption tool, because I pass things over to Instapaper. It strips out a lot of content, I can go through and type in one or two little notes about things or highlight things. But for me, it's more awareness that that content piece about that topic exists, I have it in my archive, I can go search for it and find it when I need it. But I don't need that active note taking unless I'm doing exactly like what you're talking about. If I'm writing something, or I'm producing some piece of content that needs to have that context provided, and also needs to be able to, you know, be able to cite where these ideas originally came from, then yet, then I'll have that piece. But I've moved away from that quite a bit. And I think it's primarily become, or because when I go back and look at the notes that I've taken by hand around those topics, after time, I get no value from them. They're just there. And I have to go back and quantify and say, okay, was that energy that I expended to capture that handwritten that way? Or detailed that way worth it? Did it actually contribute to the end goal that I have. And in most cases, there was a much easier way to do it and get the same value out. So yeah, I agree with you there. I wanted to make

Raymond Sidney-Smith 47:42

a quick note here about something you talked about earlier, which was the idea of putting things in italics, which I really like, for me, I actually put my just initial are at the beginning. So I usually put our colon, and then that's my internal dialogue with myself. So I just wanted to let people know that there are different ways in which you can, you can signify that, that this is not something that was said in the meeting, but something that you just thought during the meeting. And I really like to make sure that's the case. That's also the case when I'm actually reading books and taking notes against books. Because many times I'll forget whether or not an idea was mine or the author's in a book. And I want to make sure that if I had a new novel idea

that came from a book that I give myself credit for that, you know, many times I'm not doing anything with that, but it's still nice to know like, oh, yeah, that's a novel thought. And I may want to do something with that in the future. But I don't want to miss it miss attribute, that particular item. And so then it's like, oh, that isn't the author's idea. That's actually my idea. So many times, I'll look in a book and I'll say, Oh, this book said, and then I'll say, oh, no, actually, that was me saying that in my notes about the book, because it came it spurred from the book. And so it's good for you to be able to just differentiate those pieces when you're taking notes like this is your idea, not somebody else's idea. And also, my thought there is that I want to be able to attribute, you know, pieces to the book appropriately. So I want to be able to do that. So I differentiate that in Kindle, since you're capable of coloring your notes. I also color them in addition to putting that our colon, which is my initial, my you know, you can put your own initials. You don't have to put mine. So you can just go ahead and put an initial just to give yourself a signifier that this is your thought and your idea and kind of go from there.

A Art Gelwicks 49:32

This is a great way to use something that we've talked about in the past, which is the embedded tagging as well. You look at tools like workflowy OneNote, Evernote, the ability to tag at a line level OneNote has kind of weird ways of handling tagging, but one of the things you can do is highlight a section and apply a tag just to that section, and then go back and say give me everything tied to that tag workflow. You can do it on line level in that sort. So to be able to take that just like your our colon is the equivalent of your tag, maybe have the tools will allow you to do the same type of thing and say pull back my comments. And then you can pull back that summary of your comments, or in this case, action items or wherever it is. So this is where I go back to what we talked about earlier, which is think about what you need to do with what you're capturing. And then make sure that's doable within the tools framework that you're you're creating, and you're working with,

Raymond Sidney-Smith 50:25

will say this in response to your thought, Francis that somehow transcriptions and AI are going to be able to help us here. The reality is, is that I would rather take for those of you who kind of pulling back the veil, we have an episode agenda for every episode that we do here on ProductivityCast. And if at any given time after the episode, while we create transcripts for you, the listeners, I would never go to the transcript. To learn more about what we discussed in an episode, I would always jump to the episode agenda where we're all capturing and corralling together the outline and the notes and the things in which we discussed. And so I'm frequently taking notes directly into the agenda. And so that's where I'm taking my notes. And many times, I will jump over to Evernote and I'll take a note, you know, while we're meeting and I think oh, this is novel, let me capture that into my own notes. It's, it's in that space, that our thoughts are being combined, that are not necessarily in the recording itself. And that augments the knowledge. And so augmenting the knowledge of what's happening in the meeting is as important as the meeting words that are said. And so I don't want to I don't want to devalue for people, the fact that when you are in a meeting, we're having thoughts and other items that may not actually get put into it also, the fact of the matter is that they're introverts. And introverts also need a way in order to be able to contribute to a meeting. And that's not always in speaking during the meeting. And so if we want to bring introverts and ambiverts, who are just in an introverted, you know, kind of moments during a meeting, to be

able to be included in those meeting thoughts, we need to really capture both sides of that. And I think that both writing and speaking, are important to make a whole meeting. And so I just want to keep that in mind for everyone that if you're not the most loquacious person, you know, like the four of us here, we don't have any problem with turning on a mic and talking. But the but there are people who in a meeting would not be comfortable with piping up and saying their piece. And if that can be done in a written format, that's going to be more useful to you. And that can then be incorporated into the meeting minutes. And then people can review it and note that there were some important ideas that were not necessarily discussed in the meeting itself. And this is where I really encourage people who are introverts to actually put those thoughts into the agenda to begin with. So that that can be discussed during the meeting, as opposed to getting that in the meeting minutes. And then people not actually reviewing the minutes afterwards, and therefore, it kind of gets lost. So try to get those into the agenda more than into the minutes.

A Art Gelwicks 53:11

Well, one of the most popular features when teams came out every day, I got this from a whole slew people, oh, you can do an automated transcript of a recorded meeting, it'll generate a transcript for you. Yeah, at about 70% accuracy. So that becomes part of the challenge is now you've got something that has a transcript that now you're going to count on that transcript, but are you going to count on it? So the technology? Yeah, you have the recording, and the transcript, and you can, you can go back and dig through that. I'll play devil's advocate, though, we can't get people to read meeting minutes in one email, much less dig through an hour's meeting recording that they just sat through and didn't pay attention to in the first place. So while there's value to having it, it's often more value of, okay, you screwed up. So now I'm going to go find in here where you committed to do this, so I can yell at you, because you screwed up. That's what it often gets used for, which is unfortunate. So there has to be that balances. I keep thinking about we're talking about use of the notes. And one of the things I do, I've started to force myself to look at when I go back and review notes is, what value is this note that I took going to be for me today, tomorrow, in a week, a month and a year. And I look at all those markers and say, if it's not going to be any value for me in a week or in a month, then why do I have it? Can I get rid of it? Can I dispose of it, archive it? And I find I actually don't dispose of notes very often I just archive them because the hoard the digital hoarder in the back of my mind says, you know, hold on to those bits because you might need them. They don't take up any space anyway,

F Francis Wade 54:53

that there's some things that I'm trusting the internet for and notice also is that if I can find it with a Google search And I don't need to necessarily save it in Evernote, because I can always refund it. So if I can trust the internet somewhat and say that it's going to be there when I, if I ever need to in the future, then I don't need to pick up my personal time space effort in order to track it. I'll just if the need arises, I can always refine it. And that's not perfect, but I am, you know, the internet is becoming our external brain, right? That's kind of what's happening.

A Art Gelwicks 55:35

It is. And we have to be comfortable with that mechanism. I mean, we have to give us the give

ourselves the latitude to say, Do I need to know this? Or do I need to be able to go find it? And that's exactly what you're talking about as being Can I go find this again, with some internet content, it is. limited duration, it can disappear. So I find I use the out or the OneNote. Web Clipper, constantly, I always use it because if there's a page I'm looking at, and I might have an interest in it, I'll hit that button. And literally, it's hit the button in another button move on. And I know it's in OneNote. And I know I can capture it, I can move it to Nope, I can do whatever I need to and I will lose it if I possibly need it. But that's a reaction to that behavior. Do I need to sit there and take fully detailed notes on that page? No. Do I need it to be available in the future? Possibly. And that's that's where I count on the system. But again, there's baggage attached to it. I think about literally the just the hundreds and hundreds and hundreds of notes I have for pages like that, where I've captured something, and I caught myself this weekend going through looking at this going, why the heck did I even capture this? But in 2015, when I did, there was some relevance to it. Now, not so much.

F Francis Wade 56:58

Muhammad, the chat on a webinar, for example. So you know, that's, that's, in some cases, the chatters as important as what's being said in the recording. And I've seen, you know, conversations take place in the chat that you're right, it can't happen on the stage on a webinar or with a person who is leading it, because it would be too chaotic to get everybody in talking on top of each other. That does happen. It does ruin meetings in zoom, for example. But the chat seems to also serve that purpose that you're talking about. That there are some people who are really comfortable. And they spend a whole meet at an if they're listening to even the main event, but they have so much they're getting so much value from the chat itself. That strikes me as I don't know, if you call it a form of note taking. It's a form of meeting, it's as much of the meeting as the main, the main video recording. It's just that it's in text. I think you're absolutely right, the combination of the two is becoming this whole new thing that I wouldn't have thought would have become a thing two years ago. But definitely I've seen so many examples of it. No, I'm been on the stage when people are chatting, or I'm chatting other people are on the stage. It's like this alternate universe that supports and complements, what's happening in the main video.

A Art Gelwicks 58:27

The back channel can be really empowering in those types of interactions, it can also be very disruptive. You can wind up with both of those, those cases. But it I wanted to touch on something before I lost it. One of the things that we were talking about the recording and being comfortable with using your voice for that, that's actually a great way to do to bridge these two. And I'm not talking about recording meetings, I'm talking about using speech to text. That is an excellent way if you're not a comfortable typist, if you're not happy with your handwriting, if you're not, you know you don't think you're fast enough to keep up with things. Speech to Text is a great way to do it. Most of the tools. Now most of the platforms support very clean, very efficient and very accurate speech to text where if nothing else, you can do the bulk of the text capture there and then go back and clean it up after the after the fact I do that literally all the time. Whenever I'm I actually have a physical book and I'm taking notes in that book. I'll have my phone sitting next to me with one note loaded on it. And I use the Google keyboard that passes the voice through to Google to do the transcription. And I'll tap the mic, say a note say what page I'm on. Tap the mic again to turn it off and just keep going. My hands don't have

to leave the book. I don't have to worry about typing in I don't get distracted by structure or anything like that. And I can just keep going through what I'm doing after the fact then I can go back and take that transfer that speech to text and review that text and then turn it into something that I want to keep if I want to keep it. So that's a habit I use all the time. And I'm not a slow typist by any stretch. But it's just more efficient to go straight from my mouth into the machine than it is to have to pass through my hands on the keyboard and artificially get cleaned up in the application.

Raymond Sidney-Smith 1:00:21

Fantastic. I did want before we ended to talk about the fact that there is the charting or the matrix, note taking method. And this is just the idea of using some level of of matrix, whether that be a table, where you outline the various portions of a meeting, you can really structure a chart in so many different ways. And I find it not to be my most useful way of taking notes. But I do know a lot of people who do like to do that, because you can move the individual parts of the note by virtue of the fact that each note is in a cell or in a row of a table. So for those of you who may be interested in that, maybe at some point in the future, we'll we'll come back to that topic. But those are the various kind of note taking methods that we're aware of and have used and so on, so forth. Obviously, transcription and using voice to text and others are really also powerful and important. While this was actually really an interesting conversation, I think about the various note taking methods and the way in which we all see perceive and use note taking in our own worlds, we have lots more to talk about note taking as we make our way forward in this little mini series about note taking. And so I appreciate everybody's thoughts and conversation here. With that. While we are at the end of our conversation, we are obviously not stopping you from engaging with us in the conversation after the fact. So if you have a question or a comment about what we discussed during this cast, feel free to visit the episode page on ProductivityCast dotnet. You may be listening to it now. But if you're not in your podcast app and you are on the site, they're on the page, if you go to the bottom of the page, you'll see a question or comment field, you can go ahead and comment or question us directly in there. By the way, if you need to get to any productivity cast episode really quickly, just use the three digit episode number following productivity cast dotnet forward slash so productivity, cast dotnet, forward slash 001 would be the first episode 002, and so on and so on. We'll get you directly to that episode very quickly. I want to Oh, so if you have a topic about personal productivity you'd like us to discuss on a future cast, feel free to visit ProductivityCast dotnet forward slash contact, you can leave a voice message that is voice recorded message and or type a message and we'll be happy to see if that's something that we'll talk about in a future episode. And so thank you for your suggestions always. I want to express my thanks to Augusto Pinaud Francis Wade and art Gelwicks for joining me here on ProductivityCast. Each week, you can learn more about them and their work by visiting productivitycast.net Two, I'm Ray Sidney-Smith and on behalf of all of us here at ProductivityCast Here's to your productive life.

Voiceover Artist 1:03:02

That's it for this productivity cast, the weekly show about all things productivity with your hosts, Ray Sidney-Smith and a Gousto pinout with Francis Wade and art Gelwicks