

Should I Be Taking Notes?: Episode 267

Elena: Are you taking too many notes or none at all? If you've ever grappled with whether you should be taking notes during your coaching session, then this one's for you. Hello friends, and welcome to the Bright Morning Podcast. I'm your host Elena Aguilar, and in each podcast episode, you will learn how to lead conversations that build connection and spark change.

So today we're diving into a deceptively tricky question. Should I be taking notes while I'm coaching? It seems simple, but this question touches on trust, presence, memory, and even power dynamics. So let's explore what thoughtful, aligned note-taking can look like and how to make it work for you and your clients.

A lot of coaches feel unsure about whether to take notes during conversations. They worry, will it distract my client? Will I lose connection? Will I forget what was said if I don't take notes? And without a clear approach, coaches end up doing one of two things, taking so many notes that they miss what's happening right in front of them in the moment, or taking none at all and struggling to remember key insights later.

If your note-taking is disorganized, inconsistent, or distracting, it's probably not helping. Your notes might be hard to find later. They might be full of words but lacking meaning. They might be disconnected from your planning or reflection process. And that means that you are missing out on the true purpose of note-taking, which is to deepen insight, build continuity, and honor and track your client's growth.

When I first started coaching, I carried around a notebook and I scribbled constantly during sessions. I thought I was capturing everything important, but then I would go back and I'd look at my notes, and I realized that they didn't help me that much because they were messy and unclear and didn't really connect to what I needed to do next time.



So over time, I created a pretty simple framework, which included that I jot down only what I know I'll use later, direct quotes, specific goals, and big insights. I keep my notes in the same document where I plan and reflect, and I always let clients know that I'm taking notes and why. When clients know that you're capturing their ideas because you care, it builds trust.

And when you have a system that links planning, coaching, and reflection, then your practice becomes Transformational. And this is why I dedicate an entire skill session to this topic in my Coach Learning Library. In the skill session, that's called note taking. During coaching conversations, you will learn what kinds of notes to take and what to leave out, how to stay present while jotting things down, where to store your notes and how to integrate them into your coaching flow.

And we also explore ethical considerations about how to talk to your clients about your note taking approach. So here is my challenge for you for this next week in your next coaching session, jot down only three things, a key quote, a specific next step, or a goal and something you want to reflect on afterwards, then review these notes and see what they unlock for you.

So remember this, good notes don't pull you out of the conversation. They pull you in deeper. They help you remember, connect, lead with intention. Okay? If you wanna feel confident in your next conversation, then the Note Taking During Coaching Conversations Skill Session is live in the Coach Learning Library.

If you ever questioned how or when, or why to take notes, then this is the clarity you need. Your memory is valuable, but it's not enough. So let's build systems that support your brilliance. Don't just coach, learn from your coaching. You'll find the link in the show notes along with a link to our upcoming free community webinars.

Thank you for being with me today, and if you appreciate it, today's episode and you're listening via podcast, then please share it with someone you know who might benefit from it. And or you could hop over to Apple Podcasts and leave us a five star rating and a review that helps others discover it. And I love your reviews.



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All right, friends, LesLee Bickford is the podcast producer and Stacey Goodman does the sound engineering. Take care and be well everyone.

