Making note-taking work for you

A flexible way to capture key ideas, questions and next steps at work.

Notes do not need to capture everything

Useful notes help you find what matters later. You can write keywords, use short phrases, sketch a diagram or type your notes. Choose a method that reduces effort rather than adding to it.

Three things to capture

Key information	Questions	Actions
What was explained, agreed or demonstrated?	What needs checking or clarifying?	What needs to happen, by whom and when?

A simple example

Key point	The team will use a new shared calendar.
Question	Who will update it when plans change?
Action	Ask for the calendar link on Thursday.

Before you start

Choose one situation where notes would help. Decide whether you need a two-column, three-column or meeting template. It is fine to adapt or leave out any section.

Where might structured notes help me most?

The two-column method

Keep the main information separate from questions, reminders and actions.

How to use it

Write the key point on the left. Use the right column for what you want to check, remember or do. You can add a brief summary afterwards.

Worked example

Key information	Questions or actions
Training starts at 9:30 on Monday.	Check which room we are using.

My two-column notes

Key information	Questions, reminders or actions

The three-column method

Separate key points, supporting details and the next step.

When this layout helps

Three columns can be useful for training, instructions or reading notes. Keep entries short and use the widest column for the information you need most.

Worked example

Key point	Supporting detail	Next step
New booking process	Use the shared form	Practise one entry

My three-column notes

Key points	Supporting details	Questions / next steps

Meeting and training notes

Capture decisions, responsibilities and follow-up without writing every word.

Meeting or training topic	Date / people involved

Discussion and useful information

Decisions made

Actions and follow-up

Action	Who?	By when?

Instructions and processing

Turn a longer explanation into manageable steps and questions.

Break the task down

Record instructions in the order you will use them. Ask for written steps or a demonstration if that helps. You can return to this sheet when the task changes.

Task or instruction I am recording

Steps to follow

01

02

03

04

Questions or details to clarify

My personal note-taking system

Create a flexible approach you can reuse and adjust.

What works for me?

There is no single correct way to take notes. Use the prompts below to identify a method that feels clear, manageable and easy to revisit.

The note-taking format I prefer

What helps me capture information

How I will find my notes later

What I might ask others to provide

My next small step

One change I would like to try

Reminder: Your approach can change depending on the task, your energy and your access needs.