Accelerating Coach Excellence Bonus Tool:

Mastering Client Note Taking

How do you take notes effectively and stay present in the conversation? Tips from David B. Peterson on how to do it so it doesn't get in the way of building rapport.

Why take notes on the computer?

- Capture insights, lessons, details, names, etc., and always have them readily available in one place
- Track topics, trends, or patterns that may be significant later
- Capture relevant personal information about your client, including family, interests, birthday, etc.
- Maintain a record of number of sessions and dates
- Keeping notes on a computer enables fast, easy search options. If my client says, "did we talk about Esther last time?", I can easily search for the name and skim through our previous discussion(s) on any topic

Two critical factors

- Maintain eye contact. Learn to touch type, even if you make spelling errors. Eye contact is important so you don't look distracted. In fact, for most people, typing is even better than taking notes by hand for maintaining eye contact
- Make sure the computer screen isn't a barrier between you and the client; position it to the side so you can still type easily, but the screen is not blocking your ability to see each other fully.

Other considerations

- Think about how you will ensure appropriate confidentiality with any notes, regardless of where you store them
- Evaluate potential legal liabilities and responsibilities if your notes are ever requested or subpoenaed
- Consider using shared docs, such as Google Docs, with each client for taking notes and keeping track of action items together.

Note-taking Template

In general, try to take relatively complete notes throughout the entire conversation, both what they are saying and your own thoughts or summaries, including items for follow-up or revisiting at a later time.

Highlight particularly interesting comments as well as items you will likely reference again at another time.

When you start with a new client, copy and paste a version of this template in a new doc, duplicated a couple times so a fresh copy is always readily available.

Template:

Client name:

Date:

Location:

Updates:

Agenda:

Notes:

Practice/Scenarios:

Lessons learned today:

Assignments/actions:

1.

2.

3.

Work on next time:

Here’s a version with additional notes and context:

Client name:

Date:

Location:

[Physical location of meeting or where each of you is located when on phone or video conference meeting; plus any other information on context, such as “just got back from vacation” or “first meeting since pandemic started”, etc.]

Updates:

[What’s new, what’s happened since we met last time, progress on assignments, any changes in organizational context]

Agenda:

[Notes on what we planned to cover today, topics to start exploring. This is based on our overall goals, topics that got raised in previous sessions that we want to follow up on, etc.]

Notes:

[General notes that come up during the conversation; sometimes all the notes end up in other sections.]

Practice/Scenarios:

[This is where you take notes on situations you are exploring or strategizing how to address, since we often practice different aspects.]

Lessons learned today:

[Always ask, what did you learn today, what are you taking away from our conversation?]

Assignments:

[Given what they learned, or other insights from our conversation, what specifically are they going to do? What homework assignments, reading, or other actions (e.g., seeking feedback) do we want to track?]
1.
2.
3.

Work on next time:

[Any topics we agreed to cover in our next session or my notes on topics to follow up on in the next session or two.]