

Writing at Work: Note-taking

Name: _____

Outcomes

By the end of this booklet you will be able to:

- Organize your ideas for writing notes
- Make simple notes to keep track of instructions
- Use a list to prioritize ideas
- Summarize ideas using notes to create good work place writing
- Understand the importance of concise communication in the workplace
- Summarize information in a variety of workplace writing

Date	Learner Comments	Instructor Comments

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Note-Taking

Note-taking is an important skill that is transferable from studying to the workplace. Effective listening and note-taking skills are second in value only to time management skills. Note-taking is an excellent way of summarising and retaining the key points from the information you've heard or read.

In "Writing Foundations: Planning" you learned about various methods for organizing your ideas including making mind maps, flow charts, sticky notes and bulleted lists. You can use any of these styles to help you take notes.

The benefits of developing good note-taking skills extend well beyond high school, college or university. The purpose of note-taking is to record and remember, so writing organized and effective notes will help you better remember instructions, meetings, and events connected to your job. Taking notes also helps you to concentrate and ensures a higher level of understanding of the information you are working with.

To take notes effectively:

- don't try to write down everything being said
- Look for key ideas
- identify and select only what is important, the main points
- Listen for the directions

Taking notes ensures you are listening to what is being said. It requires you to think about what you are writing, and it helps you make connections. When taking notes, it is important to write the information clearly. It is a good idea to write a summary of the ideas and facts using key words as cue words. Summarizing helps to clarify meanings and relationships of ideas, and reviewing, by skimming over the main ideas and details, will enhance your memory.

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Task 1:

Every morning all the staff meets to get instructions from the supervisor. She has the habit of just shouting out everything that needs to be done by everyone, so you need to pay attention. You are one of the people responsible for making sure that things in the store front run smoothly. You are looking for anything that involves taking orders, stocking shelves and the tills to put on your list of instructions. **Use the 'list of instructions' template below. Remember you would have to write quickly so you are trying to write only as much information as you need to remember what you have to do.**

“Good morning everyone! Busy day today because it’s nearly the holiday. We are expecting a lot more shoppers than last week. We should also be getting a lot more orders this week than we did last week. I want 5 staff members on the store front floor at all times today.

Who’s trained on the till? Jeff, Valeen and Alaedin, great! You three are on tills. Neil, I need you organizing the supply room and mopping and cleaning at close. Tamar and Rana, I want you stocking shelves, make sure you are looking for the open boxes and bags before you move into our new shipment. One of you two can take a till to cover the other cashier’s breaks.

Jason you can take orders and jump on a till if we need to open an extra one, help stock the shelves in between orders. Orders are your priority though. If you are on the tills today your lunch breaks need to be done by 1:30pm!

This is Greycloud, our new employee. He needs to be trained on the till, so he can shadow Jeff. Take your breaks when Jeff does, Greycloud. Everyone keep things looking tidy, straighten up the shelves and clean up anything out of place any time there are less customers. Staff meeting today after close at 5, everyone needs to be there.”

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Making and Using Lists

A bulleted list is a simple and popular way to take notes. Lists can be useful tools to organize your thoughts. We use them in everyday life to help us with grocery shopping or to keep track of chores in a “to do list”. On many job sites a supervisor, or boss might give you a series of tasks that you need to get done during your shift. If you need to write these instructions down quickly a list is a great way to capture the information.

Task 2:

Your job involves working at a drop-in center. One of your responsibilities is buying supplies for the staff. There are many activities that happen at the center. There is a kitchen where meals are prepared, there are also bathrooms that need to be stocked and cleaned, as well as general activities. Before you make your shopping trip you need to visit each of the staff members to find out what supplies they need. Use the shopping list template provided.

Elma, the custodian, tells you that she needs some light bulbs for the woman’s bathrooms as well as toilet paper. She is also out of floor cleaner and she prefers Pine-sol. The shower room is out of shampoo as well.

On your way to see the kitchen staff you run into Danica in the hallway. She tells you that more disposable coffee cups are needed and that she needs three Jenga games as there is going to be a tournament for fun, tomorrow.

Finally, you find Andrew in the kitchen. He and Kingsley tell you that they are making grill cheese sandwiches and tomato soup for lunch. They will need 4 loafs of bread, butter and two packs of cheese slices. They don’t want to make their own soup, so they want you to buy 6 cans of tomato soup, whichever brand is cheaper. Tonight, they will make a Caesar salad, with lettuce, dressing and

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croutons, garlic toast and 4 boxes of spaghetti with a large package of ground beef for dinner. They have no supplies for this except garlic for the toast. They want canned sauce for the spaghetti, 4 large cans, see if you can find something on sale. They'll need two more loaves of bread for the toast.

Just as you are about to walk out the door Danica reappears and tells you they also need a big can of coffee.

Shopping List

Bathrooms	Kitchen	Miscellaneous

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Writing to Record:

The goal of note taking is to accurately record information so that you can communicate the correct information to others. This is a skill that you can build by practicing. To do this you are using analytical thinking skills to write and record.

- Scan - take in as much information as possible without judging it
- Structure - record the information and organize it into categories
- Clarify - ask questions to make sure that you understand the information

You will need to listen carefully to capture the key points. Two of the most important skills for note taking is to be able to listen carefully and to choose only the information that is important to write down as you won't have time to write everything. There are different styles of note taking that can be used.

Task 3:

Make up five questions to ask someone about their favourite tv show, sport or meal.

Find a partner to ask these questions to while you take point form notes of what their answers are. Staple the questions and the notes on the back of this booklet.

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Note Taking Using Summarizing

Many work places have a common need for summarization of information; managers write summaries about employee performance, a customer service representative might summarize what a customer needs, health care employees will summarize a patient's health status, or an employee might have to write a summary of events that happened on a shift.

A common workplace task is taking notes by summarizing information. Summarizing always involves taking a large piece of information and making it shorter and more efficient by taking the important information, cutting extra material out and improving the organization of the information.

To do this successfully you need to recognize the important details and organize them in a clear way. Only keep the information that is needed and make sure your information is accurate. You can present information clearly by using chronological order, or order of events. You can also use bullet points or headings to keep things organized.

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Task 4:

Jason's manager has called and left a voice mail asking him to send out a message to the rest of the employees. He needs to summarize the voice mail and put it into his own words to send out as an email to the rest of the staff.

Voice Mail:

"This is Jemma. It's supposed to snow all day and the roads are a mess and driving conditions are unsafe. Let people know that the office is closed. This will affect profits, but it can't be helped. Employees with remote access may work at home, but it's not required. If needed, I can be reached via my home e-mail, Donna@home.ca. People should assume the office will be open tomorrow unless they hear otherwise."

Jason's email example #1:

✉ To: All.Staff@importantjob.com
Cc:
Subject: Weather Issues
<p>Good morning,</p> <p>As you may have expected, Jemma has made the decision to close the office today due to the unsafe driving conditions. The roads are being closed and so be safe and stay home. Our profits will suffer, but I suppose worker safety is more important.</p> <p>Jason</p>

- A few important pieces of information that effect the other employees were left out. Which two pieces of information should have been included in example email #1, which most employees would have questions about?
- Underline the statement that isn't work appropriate or has the wrong "tone".

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Jason's email example #2:

✉ To: All.Staff@importantjob.com
Cc:
Subject: Office Closed Due to Road Conditions
Good morning, Due to the road conditions, the office will be closed today. Please note: <ul style="list-style-type: none">• Employees with remote access may work from home, however this is not required• Donna can be contacted via email at home if necessary• Please assume the office will reopen as normal tomorrow unless you hear otherwise Enjoy your 'snow day', Jason

- c) Compare example email #1 and #2. Which subject line is more accurate and better describes what is happening?
- d) What additional piece of information is missing from the example #2 email which would be helpful for staff?

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Task 5:

Read the following article and highlight important points. Select the 5 most important points and record them in a point form list.

40% of workers don't have the basic skills to do their jobs, Canada West Foundation says

The Canadian Press · Posted: Jun 01, 2015 2:25 PM ET | Last Updated: June 1, 2015

A new report says missing job skills in industries from retail to engineering are hurting Canada's productivity.

[The study](#) by the Canada West Foundation says 40 per cent of employees could perform better if they improved on basic skills like math, reading and writing.

The skills being discussed are not advanced — they're not necessarily highly technical in nature, nor are there individually rare in many people. But collectively, many workers are held back by their lack of things like basic computer skills, numeracy, language skills and the ability to work with others.

It says roughly half of people who didn't finish high school are missing such essential skills, while 30 per cent of university graduates are also lacking skills needed for their jobs.

The report also says immigrants have skills shortages of between 10 to 16 per cent higher than the non-immigrant population.

In a recent Accenture study, some 36 per cent of employers said their own employees lack the skills they need to do their jobs today and for the next two years.

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Using 2011 data from Statistics Canada and the OECD, the study compared what jobs skills are needed with what skills Canadians actually have.

The Canada West Foundation says employers should invest in training to increase productivity, efficiency and safety in an increasingly competitive global economy.

It also recommends that the education system put more emphasis on essential skills training in public and post-secondary school.

"Today's economy is driven by innovation and competition, and skills have become the global currency," the study reads.

A previous report from the same organization found that of all basic skills, literacy may be the most important, as it accounts for as much as one-third of wage discrepancies between comparable workers.

"Employers pay more for people with higher literacy skills."

<https://www.cbc.ca/news/business/40-of-workers-don-t-have-the-basic-skills-to-do-their-jobs-canada-west-foundation-says-1.3095687>

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Task 6:

Go to <https://www.ctvnews.ca/video>

- a) Choose a short news story that interests you. You are going to make point form notes on this story as if you needed to remember the details to be able to explain what happened to a friend or relative. Include the title of the story. Using your notes write a brief paragraph telling what the story was about with the most important details as you would have to a friend or relative. Attach your notes and your summary to the back of this hand out with a staple.

- b) Choose a longer story from the same site and do the same. You can take notes with the idea that you will need to present the important information to a classmate or teacher. Include the title of the story. Again, write a brief summary of the story using your notes. Attach your notes and the summary to the back of this hand out.

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Answer Key

Task 1: Answers will vary but should include:

On the floor

- 5 people at all times

Tills

- Jeff, Valeen and Alaedin on tills
- Till lunch breaks done by 1:30pm
- Greycloud training on the till, shadow/break with Jeff

Tamar and Rana

- stocking shelves
- use open boxes and bags first
- cover the other cashier's breaks.

Jason

- takes orders as first priority
- stock shelves in-between
- on till if extra is needed

Everyone

- tidy shelves
- clean up
- Staff meeting @ 5

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Task 2:

Shopping List

Bathrooms	Kitchen	Miscellaneous
*light bulbs	Butter	*Disposable coffee cups
toilet paper	2 packs of cheese slices	3 Jenga games
*Pine-sol floor cleaner	6 cans of tomato soup (cheapest)	*Large can of coffee
Shampoo	Lettuce	
	Caesar dressing	
	Croutons	
	Toast (2 loaves of bread)	
	4 boxes of spaghetti	
	large package ground beef	
	4 large cans spaghetti sauce (sales?)	

* could fit in more than one category (example coffee could be kitchen or misc.)

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Task 3:

Answers will vary, hand in to be marked.

Task 4:

a) Two of the following: How to contact Donna, remote access/working from home, if the office will reopen tomorrow as usual.

b) Our profits will suffer, but I suppose worker safety is more important.

c) Example #2

d) Donna's email address Donna@home.ca

Task 5:

Answers will vary, hand in to be marked (but may include a selection of these points)

- says missing job skills hurting Canada's productivity
- 40% of employees could perform better if basic skills like math, reading and writing improved
- many workers are held back by their lack of computer, numeracy, language skills and ability to work with others
- 1/2 of people who didn't finish high school are missing essential skills
- 30% of university graduates also lacking skills needed for their jobs
- immigrants have skills shortages of between 10-16% higher than the non-immigrant population
- 36% of employers said their employees lack the skills they need to do their jobs
- Employers should invest in training to increase productivity, efficiency and safety
- Education system needs more emphasis on essential skills training in schools
- Skills have become the global currency
- literacy may be the most important of all basic skills
- Literacy accounts for as much as one-third of wage discrepancies between comparable workers
- "Employers pay more for people with higher literacy skills."

Task 6:

a) and b) Answers will vary. Hand in to be marked.

End of Module Reflection

After completing this module, answer the questions below. If you answer agree (3) for each question, ask for a review or a final assessment from an instructor. If you answer maybe (2) or no (1), have a discussion with an instructor to make a plan to improve your performance and confidence.

1 – No

2 – Maybe

3 – Yes

A	I understand all of the outcomes covered in this module.	1	2	3
B	I do not need any further assistance from an instructor on the material covered in this module.	1	2	3
C	I do not need more practice questions or assignments	1	2	3
D	I am confident in my abilities to complete tasks related to this module.	1	2	3
E	I am ready to complete a review and/or a final assessment related to this module.	1	2	3

Reflection
