

# THE ART OF VISUAL NOTETAKING



## A Guide to Professional Visual Notetaking

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So, you want to be a professional visual notetaker? By reading *A Guide to Visual Notetaking*, you're off to a great start! Included in this guide, you'll find additional helpful tips and problem-solving ideas for starting your career as a visual notetaker off on the right foot!

## CONTENTS

Someone Wants to Hire You .....	2
What to Do When You Finish a Project .....	3
FAQs & Solving Common Struggles.....	4
FAQs.....	4
“What if .?.” Scenarios.....	9
Visual Notes in School.....	13

# SOMEONE WANTS TO HIRE YOU

Great news! Someone wants to hire you to take visual notes! In order to create the best experience for both yourself and your new client, there are a few steps to take. I've outlined them here for you.

**Set a rate** Pricing can be uncomfortable to talk about for some people, especially if they've always worked for companies with assumed rates of pay. There's no right answer for how much to charge. You should charge based on the value of your work, plain and simple. Decide if you want to charge by the hour or per project. If you need a place to start, look up the average hourly rates for artists in your area.

**Use a contract every time** The best business advice I can give is to **always** work with a contract, even if you're working for free or for a friend or family member. You are conducting business, and you need to be protected. A contract ensures all people involved are on the same page. Your contract should include:



- The scope of the project
- The price you're charging and payment terms
- The terms of the project (both the client's and your responsibilities, agreements, and expectations)
- The rights and permissions (who owns the work you create, who has rights to share it and in what capacity, etc.)
- Signed and dated by you and the person hiring you before you do any work

**Do what you promise** Do the work you promised to do in your contract and give the client everything they need afterward, as far as files, canvases, etc. Show up on time, use what you've learned in this book about taking visual notes to do a great job, and thank the client before you go. Don't forget to have fun!



# WHAT TO DO WHEN YOU FINISH A PROJECT

You've finished your project. Great work! Now what do you do?

Aside from submitting the finished work to your client, here are a few more steps to take.

**Share your work** Yep! The cycle of sharing never stops! Share your work as soon as you can, provided you and the client agreed on it in the contract and the work isn't proprietary. This is also another opportunity to tell people you're available for hire.

**Get a testimony from the client** Testimonies are a powerful tool to help you get hired, because they give social proof to your potential clients that you are trustworthy. Testimonies should be visible wherever you are sharing your work. Be sure to ask permission before sharing a testimony publicly.



JUST WRAPPED UP SKETCHING  
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CONFERENCE! IF YOU WANT TO  
BRING ME TO YOUR EVENT TO  
TAKE VISUAL NOTES, EMAIL ME!



There's nothing sketchier than a vague testimony, like "John did a great job taking visual notes for us! – Bob." Who is Bob? What kind of visual notes did you take for him? What did Bob like? A valuable testimony includes the full name of the person who hired you and the name of the event or company they work for. The testimony should answer questions like "Why should someone hire you?" "What good things did you do for them?" and "Would they hire you again?"

You get good testimonies by asking for them! For every professional job you finish, send an email or survey to get the client's feedback on your performance, even if you did the work for free. This feedback, positive or negative, will help you do your job better next time and you can use it to promote yourself.

**Talk to a tax professional** If you live in the United States, you need to set aside money earned from visual notetaking for taxes. If you want to get paid to take visual notes, the IRS classifies that as a business and not a hobby because you want to earn a profit.

# FAQS & SOLVING COMMON STRUGGLES

We explored in-depth answers to some of my most frequently asked questions and common struggles among new visual notetakers in *The Art of Visual Notetaking*, but there are still a few things to cover. If you've ever had a question about visual notes or struggled with something, it's probably been asked by someone else too!

## FAQS

**"I'm not fast enough to keep up with the presenter. What can I do to improve?"**

If this is you, you're likely falling into one of these two problems:

- 1) **Perfectionism:** You're taking too much time to make your notes look amazing instead of capturing what's being said in the moment, which means you might be sacrificing content for beauty—we don't want that! Remember that you can always refine your notes to look better once you're finished capturing. There's no place for perfectionism in visual notetaking.
- 2) **Slow:** You're simply not capturing fast enough when writing down what you hear. That's ok! It can be an adjustment to learn to write fast. If you're not fast enough, the most effective answer is this: Practice.



### EXERCISE

If you always feel behind while taking visual notes in a live setting, try practicing with pauseable media and work your way up to never pausing at all.

- The first time you practice, limit yourself to only five pauses for ten seconds per pause.
- The next time you practice, limit yourself to pausing only four times with seven seconds per pause.
- Next pause only three times for seven seconds.
- Pause twice for five seconds.
- A single five-second pause.
- No pausing.



Don't rewind your media! You don't have the luxury of rewinding in real life, so don't build that habit. Fortunately, pauses happen in real life, like technical difficulties or the presenter taking a drink or telling an unrelated story.




**"I can't think of good pictures to draw! Visual metaphors are difficult for me to grasp. What can I do?"**

Luckily, you don't always have to think of a picture to draw or a visual metaphor in the moment. Sometimes the best ideas come after a few moments of thinking about it. If you don't have that luxury, there's just one thing to do: practice! Everyone hopes for a shortcut or a cheat, but the solution to coming up with better visual metaphors is to practice them.



## EXERCISE

- Divide a sheet of paper into 50 squares. If 50 squares is too small, do 25 on two facing pages.
  - Pick a topic. This can be straightforward, such as "cars," or more vague, such as "belief" or "mentorship."
  - Set a timer to go off every 10 seconds. Do NOT change the time limit! This exercise is meant to be uncomfortable and train you to create quickly.
  - Draw a simple picture in each square that relates to the chosen topic. When the timer sounds, move on to the next square. Each drawing should be different. Make sure you put something in every square! Don't sit there thinking! Just draw. It's ok if you draw badly or draw something that's not quite on topic. Just keep moving.
- 

When you're done with the exercise, do the following:

- Count the squares with drawings in them. Hopefully you have 50! If not, keep doing this exercise. Some topics might be harder than others, but a lot of empty squares also indicates subjects you may need to practice with more.
- Reflect on your drawings. What did you learn? Did you find yourself running out of ideas? How did you think of more things? Are there any squares you're proud of or think you can use in your visual library for the future?
- Pick three of your drawings to refine and make them better.



## TIPS FOR SUCCESS

- Let your mind flow. Don't shut down any ideas. There is no right or wrong drawing. The goal is to fill each square, not create a masterpiece.
- Ask who, what, when, where, why, and how when you're stuck. For example, "Who makes connections?" "What connects?" "Why do we connect?"
- There is power in association. Let your previous drawing inspire your next drawing. Associations don't have to make logical sense. The goal here is to allow your mind to think creatively. Here are a few examples of letting your mind flow through associations:

When I think of \_\_\_\_\_, I think of \_\_\_\_\_, which makes me think of \_\_\_\_\_, which makes me think of \_\_\_\_\_ (and so on).

Ex: When I think of "connection," I think of "chains," which makes me think of "links," which makes me think of "sausages" (and so on).

"I don't know what to capture and what to leave out. How can I summarize information better?"

If you read this and said "YES! This is me!" then I have good news for you. First, you're not alone! This is one of the most frequent questions I receive from people. Second, you care a lot about taking accurate notes, and that's a good thing.

The bad news is that you are not a transcription service, nor should you try to be. We need to identify the underlying problem before we can fix the symptom of over-capturing. Underlying problems could be one or a combination of the following:

**Problem #1:** You have a hard time synthesizing because you've never learned how.

**Signs and symptoms:**

- Your notes in school were twice as long as everyone else's.
- When you tell stories, you give way too much context or take a long time to tell them.
- You have a hard time getting to the point.
- You're more interested in the story or journey than highlights and practical takeaways.
- The meetings you're in charge of run long every time.

**What you can do:**

You guessed it...practice! Instead of practicing by taking visual notes, go back to listening exercises. The exercise below is a great place to start. Focus on sharing the main ideas, rather than everything else.

**EXERCISE**

- 1) Find a video of a lecture-style presentation. This could be a TED talk, a sermon, a school lecture, or a conference talk.
- 2) Next write down the following words: Title, Main Idea, Supporting Point, Story, Quote, Unsure, and Fluff.
- 3) Next listen to the video and write down what you normally would next to its corresponding title on the left side of the page. Don't draw any pictures—you're just writing down content.
- 4) When the presentation is done, review your notes. It should look something like the example here. First, reassign the "Unsure" category content to the right category. Second, cross out any "Fluff" that you might have captured. Third, cross out anything repetitive. Lastly, cross out anything that does not add to or support the main idea.
- 5) Lastly, listen to the same talk again. Don't take any notes, but review what you wrote. Continue this exercise until you begin to notice structure and learn the listening cues during presentations.



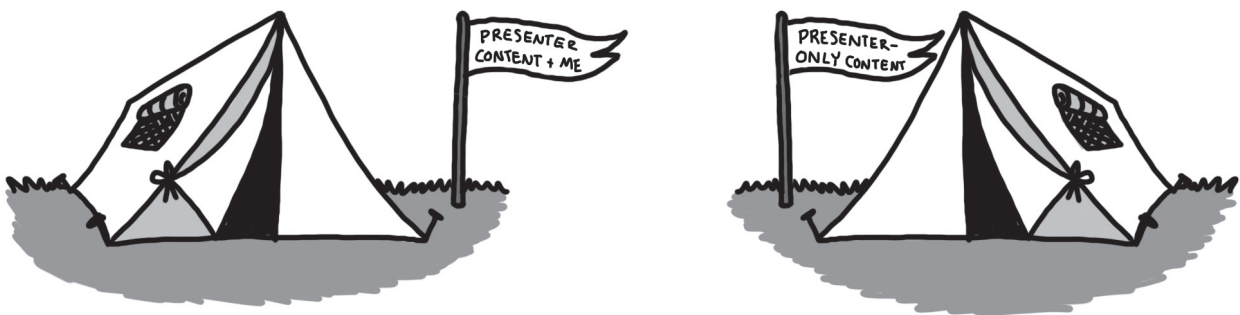
**Problem #2:** You're listening with a bias.

**Signs and symptoms:**

- The hierarchy in your visual notes doesn't match the hierarchy given by the presenter.
- You spend more time or effort capturing things you personally find interesting.
- People might mention things you didn't include in your notes.
- You put in your own thoughts and ideas into the notes.
- When you listen to other people, you're often formulating arguments in your head.

**What you can do:**

If this sounds like you, the first thing you need to do is determine your purpose in taking visual notes. You are in one of two camps: Either you take visual notes as a sort of hybrid journal/notes combo, including your thoughts with what is shared, or you take visual notes to capture only what is shared. There is no wrong answer here, but you need to know where you stand.



**If you're taking visual notes professionally on behalf of a client:**

It's inappropriate to include your own thoughts and ideas, and it's inaccurate to capture something that wasn't shared from the presenter. I'd even say it's inappropriate to include your own thoughts and ideas into your visual notes if you plan on sharing them with others because your audience has no way of separating your commentary from what the presenter shared.

**If you're taking visual notes for your own enjoyment:**

It's totally okay to write down your own thoughts and feelings, but remember this about listening: you'll capture more content more accurately if you use "head to hand" or "active" listening. The more you involve yourself (your head and your heart), the less free you are to focus on what's being shared. You might be capturing too much because you personally like it, and you might not be synthesizing because you're thinking about how the content makes you feel and what you think about it.

As always, practicing regularly will improve your craft.

### Problem #3: You're not focused enough.

#### Signs and symptoms:

- You're easily distracted and are known to "zone out."
- You find yourself on social media but forget the real reason you were checking your phone.
- You walk into a room in your home but forget why you went there.
- You've been known to check your phone or tablet while taking visual notes.
- Eye contact is difficult for you and you'd rather look around and see what's happening and who's walking by.
- You zone out and miss capturing something, then overcompensate by capturing a lot.
- When in conversation, you often don't pay as much attention to the other person as much as you do trying to think of what to say next.

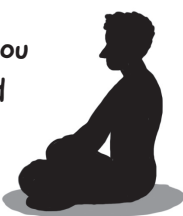
#### What you can do:

First, you need to build your ability to focus and pay attention. Practice this in the outside world so you can use it in your visual notetaking. Here are some exercises to build your focus and increase your attention span:



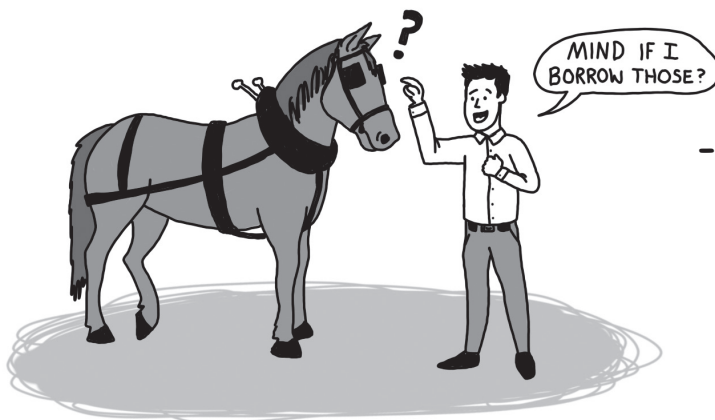
- **Use a timer.** Fully focus on an activity for 5 minutes. This could be a physical activity, reading, writing, doing chores, etc. Every time your mind wanders to something unrelated to what you're doing, call attention to it. Click a pen, make a mark on a piece of paper, or snap your fingers. You need to be able to complete 5 minutes before you increase the time limit.

- **Meditate.** Studies show that resting your mind enables you to focus more! Build a meditation habit and your focus will increase.



FOUR SCORE AND SEVEN YEARS AGO...

- **Memorize things.** Learning to memorize content, whether a speech, a document, a verse, or poetry, will train your brain to listen more closely and even keep it in your short-term memory! This skill will serve you well as you take visual notes.



- **Narrow your focus.** Only allow yourself to look at your visual notes instead of watching what's happening around you.



## "WHAT IF...?" SCENARIOS

The reality of live visual notetaking is that there is some inherent mystery and risk involved...you never know what might happen! I often receive comments and messages from my online followers wondering about tricky scenarios and how they should handle them. Planning ahead for a "worst-case scenario" can help you act quickly and not get stuck should a surprising situation arise.



Read the following scenarios I've encountered in my own professional work and learn from my experiences to determine a few possible actions you can take.

### SCENARIO

The presenter gets sidetracked—telling jokes and stories that don't relate to the topic at all. Should I capture this information?

**Option 1:** Remember the definition of visual notes: you're creating a visual record of what's being shared. If the presenter shares a lot of information that seems unrelated, it might just be due to inexperience. If you have room, go ahead and capture it, especially if the audience is reacting to it well.

**Option 2:** The presenter might be inexperienced or trying to warm up a tough crowd. It's okay not to include side stories and jokes in your visual notes, especially if you're confident that it has no bearing on the topic at hand. But be careful! Sometimes what seems "unrelated" at the beginning will be masterfully tied together at the end.

### SCENARIO

There's a really long video in this presentation. Should I capture what the video is sharing or only capture what the presenters themselves are sharing?

**Option 1:** If the video is related, capture some of the content, but just the high-level takeaways or ideas, not every detail. Chances are the presenter will recap anyway and share the biggest takeaways for you after the video.

**Option 2:** If you want to focus your visual notes on what only the presenter is sharing, mention that a video was played in your notes, but don't share any info from it. Here's a few ways you can do this:



## SCENARIO

The presenter finished their speech earlier than the schedule indicated and is now doing a surprise Q&A session to fill the rest of their time slot. What do I do?

**Option 1:** If you have the space, include the Q&A. The questions and answers are still great information to capture and share.

**Option 2:** If you're out of space or don't have enough room to include all of the questions, either pick a few to capture, or write the best questions and answers in the space remaining. If there's no space at all, you can also capture the Q&A on a separate page.

## SCENARIO

The presenter finished really early and I have a big blank space at the end of my notes! What do I do?

**Option 1:** Nothing! It's okay to leave some space if the presenter finished early, especially if your visual notes are just for you. Remember the definition of visual notes: a visual record of what happened, so if the presenter finished early, it's okay to document that.

**Option 2:** Fill it in. If you only captured the big ideas, try adding in some of the "fluff." Is there an overall lesson, theme, or takeaway? Write it large and draw a related picture to go with it. This is a great spot to do a big visual metaphor, too. Don't be intimidated by white space—use it creatively!

## SCENARIO

The presenter's time is up in less than two minutes, and they don't seem like they are anywhere close to wrapping up. I only have a small area left in my notes for the closing point. What do I do?

**Option 1:** Continue to take your visual notes as you normally would, and move on to a new page if you have to. It's better to capture everything than miss capturing a lot of important information. Sometimes the spacing just isn't perfect.

**Option 2:** Be selective with what you capture. You might not write down a lot of what the presenter is saying because you want to use your last open space wisely. I've been fooled a number of times by presenters who suddenly wrap up because their time is up. They might skip slides to get to their closing point or say something like, "I'll close with this.:" or "To wrap up.:" Capture that last point in your last open space.

**Option 3:** Use pencil from this point forward. If you aren't sure what is happening, it's okay to capture your notes in pencil. If the speaker does run long, you can review your pencil notes and then finalize later, inking only the most important points.

## SCENARIO

The presenter is cursing and using language some might consider offensive. Should I capture the exact words spoken or find alternates?

**Option 1:** Remember that visual notes are a record of information or an experience. It's more accurate to capture the exact words shared, regardless of the opinions of others. It might even be more offensive for you to censor reality!

**Option 2:** If you are taking visual notes for an audience for whom cursing might not be appropriate or welcomed, it might be best to censor or find alternate words. If you were hired to take visual notes, ask your point of contact ahead of time about what they prefer, should this situation happen.

**Option 3:** A third hybrid option would be to include the cursing, but playfully censor it, like the examples below.



## SCENARIO

I arrived at the event only to discover I forgot some of my tools! I can't take visual notes with what I have. What do I do?

**Option 1:** If you're taking visual notes for fun, don't sweat it! You might be disappointed to not have your favorite notebook and pen, but don't let that stop you. You can probably find a scrap piece of paper, spare notebook, and a writing utensil from someone at the event. Your notes don't have to look perfect to be effective. If you can't find anything, you just might be out of luck this time. Create a checklist of what to bring for next time.

**Option 2:** If you're getting paid to take visual notes, immediately inform your client and tell them what you need—they might be able to help you find temporary replacements. If no replacements can be found, you may need to skip a session to retrieve or buy the tools you need. You can either charge the client less, since you're not capturing a session, or you can make it up to them later and do the visual notes from a video or audio recording. Either way, this was your mistake. Don't make your client pay for it!

## SCENARIO

The event staff just asked me to do more than we agreed upon in the contract. What do I say?

**Option 1:** Agree to do the notes, but be clear with your contact that you have to charge them for the extra work. Never do extra work for free—you're providing a valuable service.

**Option 2:** If you don't want to do the extra work, or aren't prepared for it (i.e. you didn't bring enough supplies), be polite but firm on what you both agreed on in your contract. The client should understand.

## SCENARIO

My visual notes got damaged before I got a chance to take pictures—OR—I forgot to take pictures of my work and I no longer have access to it.

You can easily avoid this problem by taking pictures as soon as you finish. Don't put it off! Taking photos or scanning your work can be easy to forget, but it only leaves more time for something to go wrong. Still, accidents do happen!

**Option 1:** If your notes were damaged (like someone spilling water on your canvas), you can use the tools you have on hand to fix it in the moment, you can re-do the section on another canvas and merge the two with photo-editing software, or you can completely re-do it.

**Option 2:** If you forgot to take pictures or scan your notes before giving the hard copies to the client, ask the client if they can take pictures and send them to you for any final editing.



## SCENARIO

I captured the wrong session!—OR—I missed a session I was supposed to capture!

As soon as you realize your error, tell the client and offer ways to make it right. The best action you can take is to re-do the board as soon as you're able, even if it means staying late, coming in early, or working during a break period. You can work from video or audio taken during the session, but if your client doesn't have either, ask if you can have the slide deck and notes from the presenter. Something is better than nothing! It might be a good gesture to offer a discount for your error or not include that session on the final invoice.

## REAL-LIFE EXAMPLE



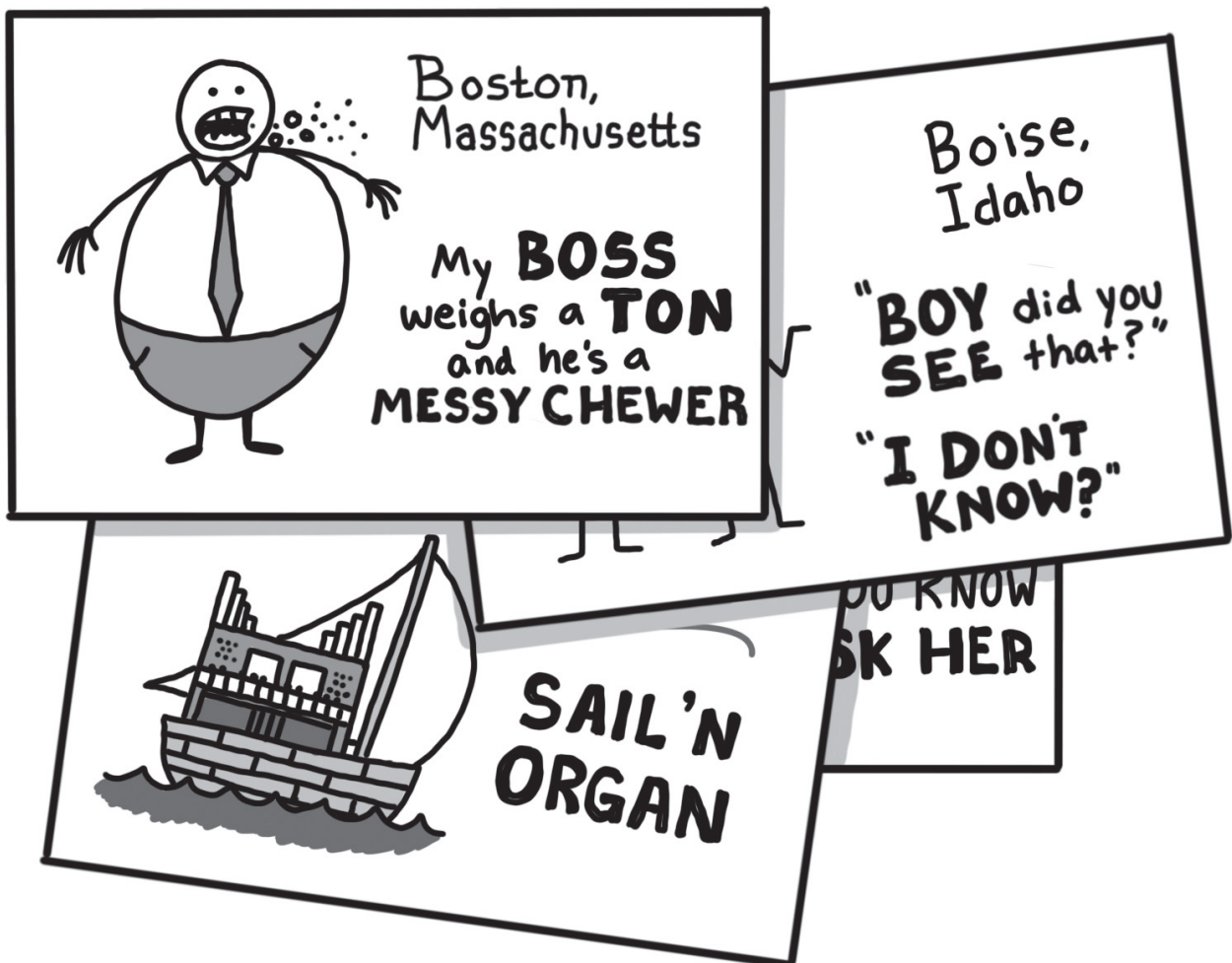
I was working at an event with thousands of people and a huge schedule of breakout sessions. I got some rooms mixed up and ended up capturing the wrong session! Fortunately, the client didn't mind at all and it made some fans out of the people who gave the presentation. At another event, I didn't get any sleep the night before and was so tired that I sat right through a session I was supposed to be capturing! I created the notes during a break from the video feed. Even professionals make mistakes!



# VISUAL NOTES IN SCHOOL

## FOR TEACHERS

I think it's important to teach students that learning can include pictures. Like a friendship, words and pictures help each other. Words describe pictures; pictures describe words. You can have one without the other, but it's better with both. I can still vividly remember a visual lesson from 4th grade: My teacher had us write the states and their capital cities on flash cards, and we drew pictures together to help us remember them. I still credit my state capitol memory to that visual learning tool from 20 years ago!



## FOR YOUNGER STUDENTS

The beauty of teaching younger children is that many of them still draw! Sadly, many young kids will have a classmate or adult tell them they aren't very good at drawing, and they may never pick up art supplies again. If you teach children at an age where they're not shy about drawing, take advantage of this! Visual notes can be a fun way for kids to express themselves and share information, even if they haven't learned to write very well (or at all.) These skills have a great chance of growing and developing over time and helping them with learning.



### In the classroom:

- Do you have students who struggle with writing? Perhaps having them draw an assignment will keep them engaged and on-task with the rest of the class.
- Do you have students who love to draw above all else? Use it to your advantage! Redirect their drawing to be focused on what you're doing. For example, is a student drawing during math? Ask them to draw out the problem with images instead of numbers. This can work with practically any subject!
- Are some students struggling with comprehension? Find ways to visualize your problem or the solution. Visual metaphors can work well! Find similarities in things that are familiar.
- What are some other ways you can communicate visually during your lessons?

### EXERCISE IDEA

Introduce the concept of sketchnotes to your students, stressing the pairing of words and pictures. Ask them to "sketchnote" a routine they're familiar with, like getting ready for bed or a typical day at school. Ask them to write out each stage and draw pictures that correspond to each one.

## FOR OLDER STUDENTS

Older students may be able to understand and implement sketchnoting better than younger students, but it doesn't mean they'll like it! Older kids may push back on visual notetaking for several reasons—discomfort, fear, etc.—but push through! The benefits should outweigh the complaints.

Here are a few ideas to get you started:

- Teach your students sketchnoting tools as a method of brainstorming, mind-mapping, outlining a paper, or data organization. Provide a template or example, if necessary.
- If you use journals in your classroom, introduce sketchnotes as another way to journal. The kids who don't like writing might prefer the drawing aspect.
- Are your students required to do a report? Offer several options, such as giving a persuasive speech or writing a paper, and include sketchnoting as another option.
- Teaching something complex? Break it down into simple shapes or a visual metaphor.
- Ask your students to do a sketchnote report or summary on a book, experiment, or learning unit.
- Use sketchnotes as decorations in your classroom.
- Use sketchnotes to get students out of their comfort zone. Many might be afraid of being made fun of for their drawing skills; teach them the basics so everyone is on the same level.
- Showing a video or presentation? Ask students to sketchnote it while it plays.
- Be on the lookout for visual notes and sketchnoting resources for classrooms. Many teachers are using visual learning in the classroom with great success.



## FOR STUDENTS

If you're a student and want to use visual notes in class, bravo! Unfortunately, many teachers and schools don't accept visual notetaking as a helpful practice, but the truth is, it really works! Don't be afraid to share your knowledge about how visual notes are helpful to you and your learning.

Here are a few ways you might be able to use visual notetaking in class:

- Create visual notes, such as flashcards, to quiz yourself before tests.
- Use visual notetaking to brainstorm and organize your ideas before writing a paper.
- Create visual notes summaries during each class or after you finish a section. Now you have a fun visual study guide (and your classmates might want it too)!
- Use visual notetaking iconography in your journal, notes, planner, or calendar to keep things straight.
- Take visual notes for your part-time job, even if they're just for you. For example, if you work in a restaurant, what phrases do you have to learn? What menu items do you promote? How do you prepare the food? Work in an office? What processes do you follow? What tasks need to be done weekly? Bonus if you share your notes with your boss! Who knows...they might want your help to create a visual work manual.

### REAL-LIFE EXAMPLE



I worked a variety of jobs in college, many of which lacked detailed training and job descriptions. As a result, I took it upon myself to write job guidelines called "How to Do This Job" and add to it every time I learned something or implemented a system. I typed up descriptions and lists, but I also drew helpful diagrams to accompany the information. Whoever took over my job when I left had a much easier time acclimating with a visual manual.

