



Research Product 2021-03

The Leader Notes Tool

April D. Sanders
U.S. Army Research Institute

Kara L. Orvis
Jessica Shenberger-Trujillo
Kristy M. Kay
Ben Nargi
Aptima, Inc.

Liston Bailey
U.S. Army Training and Doctrine Command

December 2020

Fort Hood Research Unit

**United States Army Research Institute
for the Behavioral and Social Sciences**

Approved for public release; distribution is unlimited.

**U.S. Army Research Institute
for the Behavioral and Social Sciences**

**Department of the Army
Deputy Chief of Staff, G1**

Authorized and approved for distribution:

**MICHELLE R. ZBYLUT, Ph.D.
Director**

Research accomplished under contract
for the Department of the Army

Aptima, Inc.

Technical review by

Christopher Goode, U.S. Army Research Institute
Victor Ingurgio, U.S. Army Research Institute

NOTICES

DISTRIBUTION: This Research Product has been submitted to the Defense Information Technical Center (DTIC). Address correspondence concerning ARI reports to: U.S. Army Research Institute for the Behavioral and Social Sciences, Attn: DAPE-ARI-ZXM, 6000 6th Street Building 1464/Mail Stop: 5610, Fort Belvoir, VA 22060-5610.

FINAL DISPOSITION: Destroy this Research Product when it is no longer needed. Do not return it to the U.S. Army Research Institute for the Behavioral and Social Sciences

REPORT DOCUMENTATION PAGE					
1. REPORT DATE (dd-mm-yy) December 2020		2. REPORT TYPE Final		3. DATES COVERED (from. . . to) 13 October 2018 – 10 August 2019	
4. Title: The Leader Notes Tool				5a. CONTRACT OR GRANT NUMBER GS00Q14OADU209	
				5b. PROGRAM ELEMENT NUMBER 622785	
6. AUTHOR(S) April D. Sanders, Kara L. Orvis, Jessica Shenberger-Trujillo, Kristy M. Kay, Ben Nargi, and Liston Bailey				5c. PROJECT NUMBER A790	
				5d. TASK NUMBER 331	
				5e. WORK UNIT NUMBER	
7. PERFORMING ORGANIZATION NAME(S) AND ADDRESS Aptima Gill Street Woburn, MA				8. PERFORMING ORGANIZATION REPORT NUMBER	
9. SPONSORING/MONITORING AGENCY NAME(S) AND ADDRESS(ES) U.S. Army Research Institute for the Behavioral and Social Sciences 6000 6 th Street, Building 1464/Mail Stop: 5610 Fort Belvoir, Virginia 22060				10. MONITOR ACRONYM ARI	
				11. MONITOR REPORT NUMBER Research Product 2021-03	
12. DISTRIBUTION/AVAILABILITY STATEMENT: Approved for public release: distribution unlimited.					
13. SUPPLEMENTARY NOTES: ARI Research POC and Subject Matter Expert: April D. Sanders, Ph.D., Fort Hood Research Unit					
14. ABSTRACT (<i>Maximum 200 words</i>): Communication skills are essential for Army readiness and are a core component of noncommissioned officers' (NCO) job duties (Department of the Army, 2020). Note taking is one method that can enhance communication skills through improving information processing, storage, and retrieval (Bohay, Blakely, Tamplin & Radvansky, 2011; Bretzing & Kulhavy, 1979; Denner, 1986; Di Vesta & Gray, 1972; Howe, 1970; Kellogg, 1996). We developed the <i>Leader Notes</i> tool to provide NCOs an easy-to-use, flexible, accessible, Army-specific note-taking guide. The <i>Leader Notes</i> tool is a set of reference pages (in the form of stickers) for Army green books that facilitate NCO note-taking and organizational skills, while providing methods to assist with the writing and organizational demands of their duty position. The key features of the <i>Leader Notes</i> tool include (a) symbols for shorthand notes, (b) organized logs of dates, (c) a system for marking a task or event as completed, (d) an indexing system for easy referencing, and, (e) Army-specific tips and examples. This paper describes the <i>Leader Notes</i> tool, its features, recommended uses, benefits, and suggested focus of future research. We provide details on its design and development in a separate technical report (Sanders, et al., In Preparation b).					
15. SUBJECT TERMS: writing skills, communication, NCO skills, Army writing, online resources, documentation					
SECURITY CLASSIFICATION OF			19. LIMITATION OF ABSTRACT	20. NUMBER OF PAGES	21. RESPONSIBLE PERSON
16. REPORT Unclassified	17. ABSTRACT Unclassified	18. THIS PAGE Unclassified	Unlimited		Brian T. Crabb 254-288-3833

Research Product 2021-03

The Leader Notes Tool

April D. Sanders
U.S. Army Research Institute

Kara L. Orvis
Jessica Shenberger-Trujillo
Kristy Kay
Ben Nargi
Aptima, Inc.

Liston Bailey
U.S. Army Training and Doctrine Command

Fort Hood Research Unit
Brian Crabb, Chief

December 2020

Approved for public release; distribution is unlimited.

ACKNOWLEDGMENTS

We thank all Army personnel who provided feedback on the *Leader Notes* tool as it was developed. We would also like to acknowledge the expertise and input contributed by Dr. Michelle Cleary and retired MSG Mario Cockrell.

THE LEADER NOTES TOOL

CONTENTS

	Page
Leader Notes Overview	1
Features and Recommendations for Use.....	1
Benefits	8
Next Steps	8
References.....	9
Appendix A: Printing Instructions.....	A-1

LIST OF FIGURES

Figure 1. Note-taking Tool Introduction Page.....	2
Figure 2. Leader Notes Set-up Instructions	3
Figure 3. Organization Tips	4
Figure 4. Instructions and Tips on how to Take Effective Notes	5
Figure 5. Example <i>Leader Notes</i> Content.....	6
Figure 6. Additional Resources.....	7

THE LEADER NOTES TOOL

Communication skills are essential for Army readiness and are a core component of noncommissioned officers' (NCO) responsibilities (Department of the Army, 2020). Note taking, the practice of capturing information that can be recalled and used later, is an important activity that can assist NCOs with many communication-related tasks. Decades of research show that the activity of note taking is beneficial in a number of ways, including increasing note-takers' information processing, storage, and retrieval (Bohay, Blakely, Tamplin, & Radvansky, 2011; Bretzing & Kulhavy, 1979; Denner, 1986; Di Vesta & Gray, 1972; Howe, 1970; Kellogg, 1996). Effective note taking also supports active listening and the fostering of shared understanding, both of which are critical for Army leaders as they develop accurate, clear, and meaningful messages (Department of the Army, 2015). To date, there are no widely disseminated note-taking strategies or methods taught or propagated within the NCO community (Chichetti, 2017; Sanders et al., In Preparation a). For this reason, we developed the *Leader Notes* tool to provide NCOs an easy-to-use, flexible, accessible, Army-specific note-taking guide. Although the tool functions primarily to guide the development of junior NCOs' note-taking skills, the secondary function is to provide junior NCOs with regular day-to-day writing experiences that relate to the demands of their duty position. The remainder of this paper describes the *Leader Notes* tool, its features, recommendations for use, benefits, and suggested focus of future research. We provide details on its design and development in a separate technical report (Sanders, et al., In Preparation b).

The *Leader Notes* Overview

The purpose of the *Leader Notes* tool is to provide a systematic approach to capturing important observations, events, and priorities, which junior NCOs can use to communicate more effectively with supervisors and subordinates. The *Leader Notes* tool was designed to address the typical writing needs of junior NCOs as they transition to positions that require more communication and writing skills. To develop the tool, the research team worked closely with NCOs and stakeholders to ensure it addressed the common written and verbal communication tasks NCOs reported they would benefit from with improved note taking skills. These tasks included organizing one's thoughts in order to communicate them effectively to others, organizing days and plans, delegating tasks, adapting priorities, documenting and consolidating information from others, and providing documentation for writing formal Army documents. The *Leader Notes* tool is a set of six inserts (in the form of stickers) that contain instructions, suggestions, examples, and resources designed to offer a consistent, efficient, and flexible format for taking notes.

Features and recommendations for use

The key features of the *Leader Notes* tool include (a) a description of symbols for shorthand notes, (b) organized date logs, (c) a system for marking a task or event as completed, (d) an indexing system for easy referencing, and (e) Army-specific tips and examples. The key features, based on feedback provided by NCOs, target the most common communication issues for new leaders. In order to ensure easy accessibility across the NCO corps, the research team opted for a low-tech approach to tool design.

Users can easily print the *Leader Notes* tool from a PDF file using the instructions found in Appendix A. Once printed, we recommend users place *Leader Notes* inserts in the front of a new green book or other notebook of their choice. This allows the user to maximize their exposure to the tool by placing it in a central location where they will have to flip past it any time they open their notebook. Additionally, the user further maximizes their exposure to the tool by beginning with a new notebook, as opposed to placing the instructions in a notebook already in use. Due to the simplicity of the guidance in the *Leader Notes* inserts, we believe that users will learn the system within a month or two and, therefore, may not require the inserts in future notebooks for guidance.

The first insert, shown in Figure 1, displays the introduction page, which provides the user with a general overview of the tool and its contents. This page also offers a place for the user to personalize their contact information. Moreover, this page includes the U.S. Army Research Institute for the Behavioral and Social Sciences (ARI) point of contact’s information for questions or feedback users may have.

Figure 1

Note-taking tool introduction page

If found, please contact

Place these stickers in the beginning pages of your notebook.

Introduction


BLUF: The Army depends upon an NCO’s ability to communicate effectively. Keeping well-organized and detailed notes will help you in your day-to-day taskings and communications with other Soldiers.

These notebook inserts provide tips for notetaking, which include:


1. Planning and prioritizing tasks
2. Documenting events, actions, and behaviors
3. Capturing and organizing ideas

The notes you take in your journal should give you the data you need to write effective reports such as counseling statements, award recommendations, or NCOERs.

Contents	Page
Introduction...	1
Setting up your notebook..	2
Tips for organization...	3
How to take notes...	4
Examples...	5
Further resources...	6



For more information or to provide feedback about this tool, please contact:
Dr. April Sanders
april.d.sanders9.civ@mail.mil



Draft 4.0
Page 1 of 6

The second insert provides instructions on setting up one of the core components of the *Leader Notes* tool, the index (Figure 2). This insert advises the user to title the first blank page of their notebook “Index” and to number each page. This allows the user to easily access information they have taken notes on by tracking the numbered pages in the index by topic or dates. As the user takes notes throughout their day, different topics will begin to recur that would be of benefit to add to their index for quick reference. For example, the NCO can use the indexing feature to easily locate all the notes taken on an assigned Soldier when it is time to write monthly counseling statements. Additionally, the included tip on this page indicates that NCOs can index their notes weekly. The frequency of indexing will likely depend on how often the NCO takes notes. We suggest that users find the most efficient method for their situation, thus ensuring they are able to benefit from the indexing feature.

Figure 2

Leader Notes set-up instructions

Setting up this book

Put "index": at the top of the next four (4) blank pages.

Creating an index will allow you to quickly and easily find important notes you have taken by tracking the page number. As you add content you will begin to see recurring topics. This might be the way you decide to organize your index so you can locate information quickly when you need to refer back to it. For example, you might make notes on an individual Soldier, or take notes for all assigned Soldiers on a specific date, etc.

TIP: You don't have to index or number your pages daily. Go back every week or so and index the important things you might want to refer back to. Indexing will help you keep everything collected so that you can go back to notes more easily.

Draft 4.0
Page 2 of 6

The third insert provides tips for organizing notes, including Army-relevant examples of those tips. There are three important features introduced here. The first feature is the shorthand symbols for labeling activities (tasks, events, and notes). Although we only introduce three labels in the tool, NCOs can customize additional shorthand symbols to suit their needs. The second feature is the overarching header as an organizational tool for managing activities. The overarching header can be a date, as shown in Figure 3. The NCO can decide other ways to organize it such as using a larger tasking category. For example, NCOs may use categories such as *professional development*, *sergeants' time training*, *monthly planning meetings*, or *medical appointments* for all assigned Soldiers. The last feature introduced on this page of the insert is the use of an "X" to signify when the task is completed. Many NCOs might be tempted to put a line through completed tasks but placing an X in front of the item allows the NCO to see the content of the list even after the task is completed. This might be helpful to serve as a reference for future planning or reporting to a supervisor how activities were organized or delegated. In addition, the NCO can indicate changes to plans by marking through them, thus distinguishing between completed tasks and reorganizing or reprioritizing tasks.

Figure 3

Organization tips

Tips for organization

Keep your notes brief and to the point.

Start with these three types of entries. {

Organize all of your task, events, and notes together under a specific label.

Use the date or the event as the label distinguisher.

X through tasks as you complete them.

Once a page is complete, add it to the index. →

- TASKS
- EVENTS
- NOTES

MON. 04 MAR 2019

- X LEAD PT @ 0530 - FIELD 2
- X LOCAL COUNSELING
- X PLAN ROAD MARCH
- RENEW CAC @ 1430
- WRITING SEMINAR
- LOCK UP MOTOR POOL
- WEATHER SHOULD BE CLEAR THIS WEEK

S

TIP: If you know ahead of time what you need to do, great. If not, write as you go.

Draft 4.0
Page 3 of 6

The fourth insert provides general tips on how to take notes effectively. We believe this will be especially valuable to NCOs who have not received instruction or guidance on note taking. Based on interviews with NCOs, some indicated their idea of note taking was to write down everything their leaders said (Sanders, et al., In Preparation a). Not only is transcribing their leader’s exact words extremely difficult, their focus then shifts from understanding the intent to ensuring they capture the actual words. Therefore, note-taking skills suggest a focus on main topics, such as the “5-Ws” (Who, What, Where, When, and Why), in order to capture the most essential parts of the message. Further, NCOs stated they do not receive direct feedback on their note-taking skills (Sanders, et al., In Preparation a). The NCOs reported they could conclude their notes were inaccurate if they received negative feedback from their supervisor about a missed task due to forgetting to write something down during a briefing. However, this type of feedback was indirect and vague with regard to specific note-taking skills.

Figure 4

Instructions and tips on how to take effective notes

How to take notes

- 1. Consider the 5 Ws (Who, What, Where, When, Why).**
If you aren't given all of this information, ask questions in order to get it.
- 2. Summarize what you're told rather than trying to write down every word.**
Keep words and sentences brief. Don't use a sentence when you can use a phrase, or a phrase when you can use a word.

Example:
~~Marksmanship training will be on December 4 at 9am.~~
Marksmanship training - 04DEC 0900
- 3. Use indentations to distinguish between major and minor points.**
Major point
 → Minor point
- 4. When planning tasks, make them specific enough so you can complete them.**
Example:
~~Get healthy.~~
Go for a run today
- 5. Leave blank spaces in between sections of notes, tasks, or events to allow for adjustments.**
- 6. Don't be afraid to mark it up, cross things out, make changes, or scribble and draw. The goal is to keep a rolling record of your thoughts.**
- 7. To indicate tasks that become higher priority, try using exclamation points (!) and stars (*).**
- 8. Review and (if desired) reorganize your notes later. Make sure your writing is neat enough so that you can understand it.**

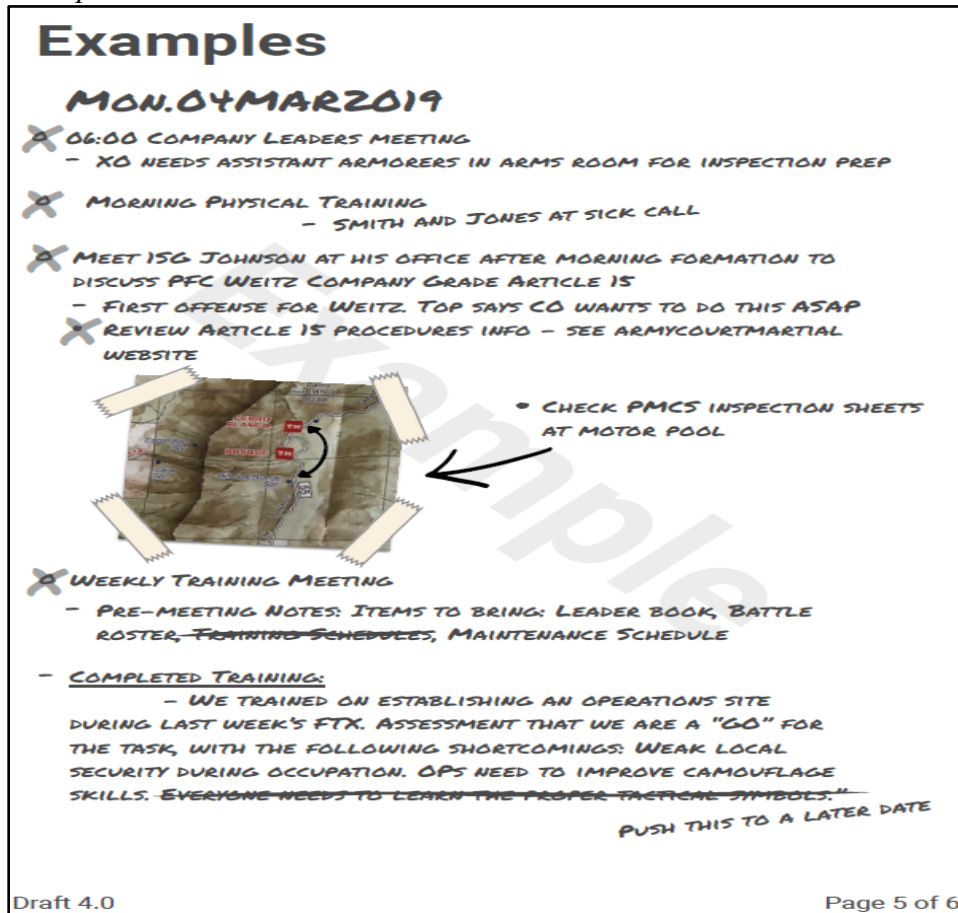
Draft 4.0Page 4 of 6

Insert 5 provides an Army-relevant example of notes that incorporate the suggestions from the *Leader Notes* tool. The example is a consolidated representation of the tips and instructions from the prior inserts. In addition, this example offers a solution to incorporate

important printed materials, such as maps or lists NCOs may receive to complete their job duties. In the example, the map is taped into the NCO's notebook under the relevant task.

Figure 5

Example Leader Notes content



The last insert provides additional resources related to writing and note-taking skills (Figure 6). We include resources specifically for incorporating technology into traditional note-taking methods since NCOs reported the frequent use of such applications (Sanders, et al., In Preparation a). The NCOs can easily combine the organizational techniques offered in the *Leader Notes* tool with other methods used for note taking. For example, they can take pictures of important hand-written notes to upload to note-taking applications for later use or print out sections of notes from online applications to secure in their notebooks for easy reference in the field. As a reminder, NCOs will need to ensure the details of notes saved online are absent of any sensitive information. Information for the *Bullet Journal Method* is also included, as it contains additional suggestions on note taking and organization that could be useful.

The *Leader Notes* tool is easy to access. It is available to print from any commercial internet connection by going to <https://www.ncoworldwide.army.afpims.mil/Resources/Leader-Tools/Leader-Notes-Tool/>. The tool is easy to set up by following the instructions provided. In


addition, because the *Leader Notes* tool does not require additional training, it maximizes the use of NCOs' time. Its interactive design reinforces learning. The tool's simple design allows NCOs to utilize the materials in flexible ways best suited to each individual and reinforces learning through its interactive strategies.

Figure 6


Additional resources

Further resources


Try digitizing your notes



Noteability





OneNote




Google Keep


Find them here



Work on your writing



BULLET JOURNAL



grammarly.com

Many of the tips found on these inserts were informed by components of Ryder Carroll's Bullet Journal® method.

For more information and tips refer to:
www.bulletjournal.com/pages/learn

Draft 4.0 Page 6 of 6

Benefits

The use of the *Leaders Notes* tool offers several benefits to NCOs. NCOs may improve their ability to process, store, and retrieve information by increasing the amount of time they take notes. Furthermore, the information NCOs take notes on can provide assistance when they are completing documentation regarding activities or details of Soldier movement and performance. In addition, by taking more opportunities to write notes, their overall written and verbal communication skills will likely improve due to the additional practice. Furthermore, the layout of the *Leader Notes* tool lends itself to prioritizing activities, thus assisting with decisions about delegation and time management.

Next Steps

Although anyone can use the tool, it is most likely to benefit NCOs who have less note taking experience. Note taking is a skill that can benefit from specific training, especially in how to transfer these skills to areas like writing. The NCOs struggle with writing when they first move into positions in which they are required to write Army documents as part of their regular job duties, which typically begins at the rank of sergeant (Sanders, et al., In Preparation a). Research indicates instructors often assume note-taking skills are common knowledge for students and few note-taking resources exist throughout the educational system (Van der Meer, 2012). We therefore recommend that the NCO academies (NCOA) distribute this tool to NCOs prior to attending Basic Leader and Advanced Leader courses, through their Distributed Learning Curriculum. Moreover, we recommend that each NCOA post the *Leader Notes* tool on their respective webpage. We also encourage all professional military education (PME) course instructors to provide information to their students about this tool so they can share it within their ranks upon returning to their units. Furthermore, we suggest providing easy access to the tool by placing it on NCO-centric websites, such as the tool's current home on the NCO Leadership Center of Excellence's NCO World Campus website would provide easy access for NCOs. All NCOs are encouraged to offer this tool to their subordinates. To ensure availability to the broadest possible audience, we are also working to offer the tool within the Training Aids Support Centers.

Future research in the area of note taking and communication skills of NCOs could take several forms. Differences in the written, organizational, and performance skills of similar individuals who use The *Leader Notes* tool and those who do not would provide important information regarding the tool's effectiveness. Because the use of technology is prevalent, it would also be valuable to examine differences that exist between written and digital note taking on the writing process or other pertinent performance outcomes. Writing continues to be an important skill for Soldiers throughout their military careers and as they enter civilian life. The same skills that make writers effective, such as clearly communicating, organizing thoughts, articulating ideas to an audience, also enhance leaders' skills. Therefore, it is important to continue improving these abilities within the NCO Corps.

References

- Bohay, M., Blakely, D. P., Tamplin, A. K., & Radvansky, G. A. (2011). Note taking, review, memory, and comprehension. *The American Journal of Psychology*, 124(1), 63-73.
- Bretzing, B. H. & Kulhavy, R. W. (1979). Note taking and depth of processing. *Contemporary Educational Psychology*, 4(2), 145-153.
- Chichetti, D. (2017). The Executive Officer. *The Field Grade Leader*. Retrieved from <http://fieldgradeleader.themilitaryleader.com/the-executive-officer/>
- Denner, P. (1986). *Comparison of the Effects of Episodic Organizers and Traditional Notetaking on Story Recall*. Final Report for Idaho State University, 1-36. Retrieved from <https://files.eric.ed.gov/fulltext/ED270731.pdf>
- Department of the Army. (2015). FM, *Army Leadership*. Washington, DC: U.S. Army Publishing Directorate.
- Department of the Army. (2020). TC 7.22.7, *The Noncommissioned Officer Guide*. Washington, DC: U.S. Army Publishing Directorate.
- Di Vesta, F. J., & Gray, G. S. (1972). Listening and note taking. *Journal of Educational Psychology*, 63(1), 8-14.
- Howe, M. J. (1970). Using students' notes to examine the role of the individual learner in acquiring meaningful subject matter. *The Journal of Educational Research*, 64(2), 61-63.
- Kellogg, R. T. (1996). *The science of writing: Theories, methods, individual differences, and applications*. Mahwah, NJ: L Erlbaum.
- Sanders, A. D., Orvis, K. L., Shenberger-Trujillo, J., Kay, K., M., & Bailey L. (In Preparation a). NCO communication skills development. Fort Belvoir, VA: U.S. Army Research Institute for the Behavioral and Social Sciences.
- Sanders, A. D., Orvis, K. L., Shenberger-Trujillo, J., Kay, K., M., Nargi, B. & Bailey L. (In Preparation b). Design and development of the *Leader Notes* tool. Fort Belvoir, VA: U.S. Army Research Institute for the Behavioral and Social Sciences.
- Van der Meer, J. (2012). Students' note-taking challenges in the twenty-first century: Considerations for teachers and academic staff developers. *Teaching in Higher Education*, 17, 13–23. doi:10.1080/13562517.2011.590974.

Appendix A

Printing Instructions

Step 1: Load 3"x5" label stock or adhesive paper into your printer. (If you do not have 3"x5" labels, you can use a larger size, but may need to cut the inserts to fit into the notebook. If label sheets are not available, you can use printer paper and tape inserts into the notebook).

Step 2: Open Adobe Acrobat Reader or similar PDF reader program.

Step 3: Click "File," "Open." Navigate to the directory containing the labels PDF file. Double click on the name of the file to open it. (You can locate the PDF file at <https://www.ncoworldwide.army.mil/Resources/Leader-Tools/Leader-Notes-Tool/>, if it is not saved on the computer you are using)

Step 4: Click "File," "Print."

Step 5: Click on the circle next to "Current page" to print a test page of the labels file. Click "OK."

Step 6: Check the test page to see if the labels are fitting properly onto the label stock or the condition of the labels onto the adhesive paper. If the labels are twisted, readjust the label stock or adhesive paper in your printer.

Step 7: Click "File," "Print."

Step 8: Click on the circle next to "All" to print the entire label PDF file. Click "OK."

Step 9: Let the labels dry for one to two minutes before peeling them from the label stock or cutting them apart with a hand-held or commercial paper cutter, if using adhesive paper.