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Guide to Using Notes Effectively

How do you remember your remarks without reading them word-for-word? Should you use a script, bullet points, or just memorize the whole thing?

These are the most common questions I receive from the executives I advise. The more senior you become, the more opportunities you have to speak: moderating panels, opening community events, or presenting to the board.

Key Points:

- Trying to memorize every speech is an *inefficient and ineffective* use of your time.
- Reading from a script makes you look formal, distant, and "corporate."
- Notes free up speakers to focus on their audience.

Every time you communicate, you have an opportunity to connect with your audience and build a relationship of trust which inspires them to take action. Notes help you do that.

How to use notes

Step 1—Write out what you want to say.

- Use as many details as you need. Get everything out of your head and onto paper or screen. Refer to my book *Speak with Impact* for effective speech structures you can use.

Step 2—Read it out loud.

- Make sure it sounds like what you want to say. Make sure it's written for the *ear*, not the eye. A note for those speaking English as a foreign language: avoid words that you stumble over. For everyone: choose words that are easy to pronounce.

Step 3—Reduce it to bullet points.

- What are the key phrases you need to remind you of what you want to say?
- What transitions do you need to keep in the document so you remember to say them?

Step 4—Make the bullet points easy to read (see below for an example)

- Focus on one idea per line
- Use at least 16 point font

- Use bolding, ALL CAPS, and other visual indicators

Step 4—Practice the speech out loud, using the bullet points.

- Make sure you've captured enough information—such as transitions or key phrases—to jog your memory.

Step 5—Print out the bullet points and bring them with you.

- Print notes single-sided, with page numbers on the top right.
- Bring them with you to the event in a clear plastic file folder.

Step 6—Prepare your stage.

- Ask the event organizer for a small high-top table on stage for your notes, so you don't have to stand behind the lectern.
- Ask the event organizer to place a glass or bottle of water on the high-top table.
- Before the event starts, do a sound check with the AV team. Walk around the stage and practice approaching the high-top table when you need to refer to your notes.
- It's OK to hold the notes in your hand if necessary.

FAQ

- **Can I use my phone or digital device to read the notes?** No. That keeps your attention focused on your screen and reduces your connection with the audience.
- **Should I use a teleprompter?** I prefer not to. It requires you to read word-for-word from the prompter and reduces your authentic delivery.
- **Should you use the confidence monitor**? Some people display their digital notes on the confidence monitor, which is the small screen at the foot of the stage. I prefer not to, because sometimes the AV team puts the wrong notes on the monitor. Also, it brings your attention down at the crowd's feet and reduces your eye contact with the audience.
- **What if I don't have time to prepare bullet points?** It's critical that you make time. Just like you would review the numbers before presenting them to the board, reducing the script to bullet points is a critical part of a leader's preparation process.
- **What if someone else is writing the bullet points for me?** That's tricky, because they will tend to write more information than you need. If you personally can take the corporate talking points and reduce them to bullet points yourself, it's a great way to practice and internalize your message.
- **What if you lose your place while speaking?** Pause and breathe, casually walk over to your notes where you've already placed a glass of water. Take a strategic sip of water, look down to find your place in the notes, and move on.
- **What if they cut your time?** Circle only essential points on your notes, forget about the rest.
- **What if you forgot to bring notes to the venue?** Turn over the event program and hand-write your intro, top 3 points, and 1-sentence conclusion.

- **How do I use these in virtual presentations?** You go through the same process. The difference is in the delivery: right before the presentation, ensure that the bullet points are visible on the same screen as your camera lens, as close to the camera as possible, so you maintain eye contact with the camera lens while seamlessly glancing down at the notes on the same screen. See below for an example.

Used effectively, notes can free you up so you can focus on your audience and your mission to make a positive impact on others.

Sample notes from my *Lead With Your Voice* keynote:

Original Script:

Let's start with Authenticity. Leaders often ask me about the biggest mistake we make when we communicate. My response is: you don't let yourself out, you create this false leadership persona, stick to the corporate talking points, and stay within this safe corporate box. As a result, people can't relate to you, which holds them back from trusting you

Bullet Points:

Authenticity

- Leaders often ask / BIGGEST MISTAKE
- Don't let yourself out / false persona / Script / corporate TPs
- = People can't see U, holds back from trusting U

Sample Notes in Virtual Presentations (same screen as camera)

