

051 Managing Digital Notebooks - ProductivityCast

Sun, 05/05 03:20PM 49:04

SUMMARY KEYWORDS

notebooks, tags, note, digital, evernote, system, productivity, analog, create, productive, information, problem, journaling, paper, meeting, people, context, structure, manage, organize

SPEAKERS

Art Gelwicks, Voiceover Artist, Raymond Sidney-Smith, Augusto Pinaud



Voiceover Artist 00:00

Are you ready to manage your work and personal world better to live a fulfilling productive life, then you've come to the right place, productivity cast, the weekly show about all things productivity. Here, your hosts, Ray Sidney-Smith and Augusto Pinaud with Francis Wade and Art Gelwicks.



Raymond Sidney-Smith 00:17

And Welcome back, everybody to productivity cast, the weekly show about all things personal productivity, I'm Ray Sidney Smith.



Augusto Pinaud 00:24

I am Augusto Pinaud. Good morning.



Art Gelwicks 00:27

And I'm Art Gelwicks. Good morning.



Raymond Sidney-Smith 00:30

So welcome to the show, gentlemen. And welcome to our listeners. So today what we're going to be doing on the cast is talking about managing digital notebooks. That seems to be a pain point for a lot of folks. And so we thought we would spend a little bit of time today in this episode talking about how people manage notebooks. And so we all actually come at this from very different perspectives, I want us each to kind of talk about our own ways in which we manage notebooks, and how that either helps or hurts us in our own productivity systems. And maybe some of the challenges that we do face as we as we move along in it. Let's start off with how each of us actually manage notebooks, what types of notebooks do we use, specifically in the digital world, but we had an episode on bullet journaling. And we talked about the physical notebook world. And so we know that in some way, shape or form, those are always going to blend into one another. So let's talk a little bit more about our our digital notebooks today.



Augusto Pinaud 01:32

Very cool girl. One is how you organize them How'd you find the information, you know, when you have to pay for one, you have this for good or for bad, you know, you can move forward, you may stay information but but you carry on. Remember, have the the reminder in front of you that you have this thing to think Digital Lifestyle and fantasies you can now put on your ridiculous women are information for the same amount of way. The problem is how you are going to find that information as much as search capability is amazing. These days, it is still a problem of remember, what is the information you put it there? Or what is the information. Dude, another one to lose out a bad note. That said there is better tools or tools that work better for certain people than others. And now the question comes on, on what you want to do now for, for me in particular, the notebook for to work. I, for years, I made the handwriting even that my my handwriting is awful, I missed the ability to hand write on the screen. But I did not want it to carry all the digital stuff that I carry with me every day plus, carrying a couple of notes. Now that now that Apple had a pro with the pencil, then it gives me the advantage that I can do good handwriting notes. Okay, even carry a couple of different notebooks for a couple of different purpose. But take good notes in the process and having a good place where I can find it.



Art Gelwicks 03:22

It's funny because it is probably one of the biggest problems I personally run into. Everybody I talked to run into one note, which is my tool of choice for digital notes is fantastic at creating multiple notebooks. The heck they have is that every time you create

a notebook, it's a separate file. So you you can wind up with just a plethora of different files. Now, there's a lot of advantages to that. But there's also some disadvantages to and trying to keep all that stuff organized, can be really problematic. You wind up with notebooks all over the place, you wind up with him in one drive in one note online, you're on your local hard drives, and it becomes a matter of given take a lot out of the normal reaction is okay, fine, I'll just put everything in 111 note notebook, Say that three times fast. If you do that, you've introduced a whole new set of problems. So there isn't really a good solution for it. Now let's throw it on top of it. My other favorite thing, which is my paper journals, because I love writing paper, you capture information, you're able to review it. But it's one of the reasons why people have gone to digital Digital's easier to recut recall, easier to search, it's lighter, for lack of a better term in many cases. And working together a concept like bullet journaling in to this mix really becomes a struggle for a lot of people because they're like, well, I want to do it on paper. But I want the benefit fits of digital, how do I get to that happy medium. So they try to do things like recreate a digital bullet journal in something like one note, which is never a perfect fit, it's doable, but it's not a perfect fit. And I think that's the hang up of all of this is there is no perfect answer to this, there's a it becomes a work process that you have to have, there's no flip a switch, all the notes will work just fine if you follow this structure, and I have yet to find a tool that does not have that problem. If it's handling digital note taking.



Raymond Sidney-Smith 05:34

I can see your point and and as you know, I'm an Evernote certified consultant and i and i love Evernote. So you know I'm a I'm a big fan of the the the way in which Evernote manages information. And you know, I think of Evernote more as a knowledge management tool. But in so many ways, it is the note taking software of choice for myself whenever I go into into into meetings, except for the fact that having a company pewter in a meeting while talking to clients is still somewhat of a barrier for me, I don't I don't necessarily know if clients don't particularly like it, but I don't like it. I don't like having a computer between us. Whereas having a physical notebook that I could take notes into general generally, is something that I feel more comfortable with. So I've actually gone to using a notebook called the everlasting notebook made by the rocket book team. And now they have all kinds of different notebooks. But this every last series of notebooks comes in different sizes. And they allow me to take handwritten notes, and then push those notes into the Evernote platform as as handwritten notes, but they are then OCR by Evernote so that I can search them. And this is actually really helped synthesize my digital system. And and so let me let me take a step back, though and cover a little bit of how I perceive Hello view the importance of being able to manage data in notebooks. Right. So, so from a note taking perspective, we have the capturing process into a notebook, we have then the management of that data within notebooks. And then we have the ability

to filter and search, you know, surface the information, hopefully more quickly than slowly when we're trying to find that information that we want. And so whether you use notebooks in the classical sense or tags to be able to filter, organize, and also create workflows. Managing that that information? Well, it's actually really important for the long term, I know that search is great. I know that the ability, you know, the search functionality, and in many digital tools today is great. But that that can't be the the the extent of your organizing, of notebooks, because once it gets large enough, then your your rate of being able to surface the information you want quickly, easily and accurately. diminishes, diminishes to a point of making you less productive, not just not just be frustrating. But then you come into this perspective of the same problem we have with paper filing, which is that you can spend an exorbitant amount of time looking for paper things. Do you do you agree or disagree? We'll start with you. Augusto. Do you agree or disagree? Can you can you not talk right now?



Art Gelwicks 08:44

He's muted right now.



Raymond Sidney-Smith 08:45

He's, he's muted. He can hear me.



08:50

Oh, okay. Gotcha. Gotcha. So he wants to he wants to Oh, okay. All right. Okay, cool. So um, yeah, so art, go for it.



Raymond Sidney-Smith 09:00

disagree? What? What's your What are your thoughts?



Art Gelwicks 09:03

I wish it were that easy. I wish it were so easy to say, Yeah, I agree with it completely. Or no, I disagree with it completely. This is that recurring problem, and I'll throw it I'll throw another product into this that neither one of us have, you know, a dog in the game for, which is simple note, simple note, as a text based note taker, doesn't do graphics doesn't do images. I think it might do links, but I'm not entirely sure. But it's just pure text based.

And when you think about capturing information into that you can do all the same types of things. You can create bullet journal type structures, you can create your own note structures. I have to go back to a basic question. Have we basically decided that 30 years ago, before we had digital notebooks, we were completely unproductive? Because that's that's really where I have to say, we used to be able to do this all the time. We had day planners, we had Franklin Covey books, we had, you know, composition books, and we got stuff done. It happened, we had our notes, we found our information. So have we just become addicted to the fact that the digital components make it easier? but not necessarily better? i? I'm still struggling with that part of it. So unfortunately, I don't have a clear yes, no, I agree. I don't agree, because it's still too old in my mind.

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Augusto Pinaud 10:39

So there are a few things to say to that. My problem with and let me start with single though I think the problem with single node is that, no, there's no really advantage of single node, you know, that's, that's a return on the original, you know, digital devices, a Palm Pilot and the pocket PCs, and all that really, never substitute. The pen and paper are a side note, mostly because you need to have that ability to be able to hand write been able to, to to make grass to make, you know, are you making a draft every time? No, but you make them often enough, were sometimes not explained better than anything else, you know, you're trying to make some measurements make a square, right down the measurements? Can you do that with stacks? Yes, you can. But it's never going to be as VCs, make four lines on the on the page and move on. And I think that's where that technology has come now where we can combination, those two things I'm finding, could we do the notes? paper, just but I think we have also been use or retrain to have accessibility everything. And I think that's what change the paper world. You know, when if I if I go and and we think on the Getting Things Done book, you know, when it came back on the 90s. Okay, one of the massive concepts that came on that book was context. Why? Because it was revolutionary, hey, not only look at their task when you are the fastest, but the contents were also really real. Okay, phone, you need to be attached to a phone. Okay. Office, do you need to have announcements. I mean, there was those contacts were physical, a lot of them were physical. Today, and I've been joking about this for years, you know, most people can put everything on a context called at anywhere, because between cell phones that everybody has, okay, you can access a new work anywhere on any kind of work is really more a matter of did you choose to partner. And I think that's what has changed was a notebooks, you could have a really good notebook and then file it or keep it in the office, and you knew you were only going to do the work in the office. But now let me ask you, when did you consider? Well, I cannot do that work, because I will not be on an office? Should you pull the laptop and work anywhere? So I think that's part of what is changing the data, not used to be that relevant that you have

access to that data anywhere? As if now? critical, but you do.

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Art Gelwicks 13:35

But okay, now, here's where I'm going to challenge you on that. Because at what point did we say decide it was critical that we have that all the time, there's a concept I've talked about in the past called spheres of access, where you think about the stuff you've got in your pockets, the stuff you've got within immediate reach, and then the stuff you've got within fairly accessible, reach somewhere in your office somewhere your home where, wherever and the information that goes along with it? what point did we decide that everything has to be in our pockets. Because what we're doing, I think, and I'm going to take the devil's advocate position, I think we're creating unrealistic expectations for ourselves and everyone else that if we don't have a piece of information immediately at our fingertips that

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Augusto Pinaud 14:18

we are a completely agree with you and you, we have created that expectation is one of the problems that we have is we are creating the expectation that for good or for bad, we can work anywhere, we can accomplish anywhere, and we have the information anywhere we go. Now, think about it, how many times you have gone on a personal setting on a work setting. And people ask you for information on they don't understand what you don't have any in front of them right now, right there and easily accessible. And by the way, that expectation is reciprocal, you are expecting exactly the same thing. I'm not saying it right.



Raymond Sidney-Smith 15:02

I would say Speak for yourself with gusto. Now I I recognize that there's a societal or cultural movement, that that I can't control. But within my own world, I am very clear about the boundaries of having access to data and access to tools, and the expectation of others to do that as well, especially when they are not working. And so so i think i think what we all need to do, listeners included, is make sure that we are creating the right set of boundaries that we're stewarding the cultural norms, the mores that are important to the movement of us all staying productive as a society because otherwise, if we have this expectation that everybody should have all their data accessible to them at all times, not just because they can because it's digital, but more important. Because they should, I think that's wrong. I think we I think we need to very much recognize the fact that we don't always need to have access to all of our data, because we should, it's, it's the it's

the inappropriate context. Like if I'm standing in an airport lounge, the last thing I need to do is to have a very, you know, intense conversation with a vendor, overpricing it's, it's not the it's not the right place in time for that conversation. You know, or if I'm in the middle of my work day, I'm not going to pick up a call from my mother, unless it's an emergency. The, the reality is, is that we have, we should be using context today, by by looking at the the appropriateness of our own energy level, our mood, you know, are available motivation, and willpower to be able to do those things as a opposed to having accessible certain things. And I think this is what kind of bring us back to managing digital notebooks. This is where having the right organized set of notebooks really does come into play. I'd like us to talk a little bit about how we organize our own digital notebooks. And and that way, we can kind of sort of help listeners understand how we've structured them in our own world for optimal productivity, how do we how do we organize those digital notebooks so that we can we can do certain things, and I'll give it I'll give an example here, from my own system, I have, I have a set of life categories that I've created. And those categories outline, for me a structure very similar to, it's identical actually, to any other organized system, organized structure in my world. So for example, a lot of people probably don't think about this, but I have matching calendars to my life categories. I have matching notebooks and stacks and Evernote to my life categories. And I have a matching folders to my life categories in Google Drive on my desktops, and those are of course synchronized. So it's, I don't have to duplicate those. But Dropbox, you name it, everywhere where the file structure is, I've managed to replicate those that system so that the highest branch of what I see is the same in my email, I use g sweet. So I have both Gmail at home and at work. And so the labels match my life categories. And as much as I can, and it hasn't been identical, because systems are the way they are. But they aren't exactly the same colors. But I've attempted to to basically match the colors to the same, which allows me to be able to quickly move things into not just the words of the life categories, but just identifying the color has allowed me to be able to manage my notebooks in a way that capturing is as efficient as I could possibly be. Because all I have to do is drag an email to a color label, I don't have to actually think about those things. And, and it's all the same. So it's structured the same, they're in the same places. So it really allows for greater productivity for me because I can quickly source things. I know the big buckets in which things live. And I know how to find those things, because they are they're always the same. There's a question about Should I put, you know, medical receipts in my invoices, my financial management notebook? Or should I put them into my medical notebook? Well, I just make a decision at the very beginning, they're always going to go into my finances notebook. And then they go in there, and I don't think about it again. So whenever you have a decision between two different places, in terms of notebooks, just choose one and just continue doing that. And it really does matter at that point.

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Augusto Pinaud 20:01

Well, and I think and I think in a matter of also what platform you're using, I for years I try I try and and my problem was them those two things was the fact that I could not really hundred and he wants nothing to do with it has to do with where the technology was. The closest to handwriting couple of bills is that I can really recall before the Apple Pencil was the tablet PC. Watson was ok, but it was animation. So then I really bulky notice in order. So for me, that changed for her really transition to a visual node became when the iPad Pro allows you to start using the pencil 200 Trump that's I use a software called good notes. And I basically had three this thing was, you know, where all my information goes and must have been there and it synchronize through all my devices. So even that I cannot technically kind of write a note on my iPhone, I can go and check open on my iPhone, where my notes allows me when I'm not carrying any other thing other than the iPhone and it's rare, but when I can even look at my notes. So there is there is my day to day no time is basically an input notebook where everything goes for chronological and then I kind of scratch and process then I have one that is more like follows bullet journals team in the sense that everything is in deck so I can go to the index and go to that part. And then all the notes related to that tend to be file there for calling in a way and then I have my impact your know where where I write every day. Patient on, you know, on the things that I have, or that I'm writing for the connectedness, you know, sort of my tree journals that I carry was a beautiful thing that I carry them on their way to the iPad.

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Art Gelwicks 22:32

Yeah, see, I have a different problem with the handwriting recognition. A lot of people struggle with it because their handwriting, it's not very good. It can't recognize. My problem is my handwriting is too good. That sounds braggadocio. But it's true. I've done calligraphy for years. My handwriting is very good. And it drives handwriting recognition bonkers because it can't read script. And I'm not going to downgrade to do printing all the time, just to account a handwriting recognition system. I know you're Yeah, it's it's it's one of those things. It's like how you know what I right? So Well, why can't you read this. And then I realized nobody else can either, because it's too pretty. But one of the things I've started doing is I've reversed the mentality between analog and digital. And it dovetails to one of our previous shows when we were talking about backup systems, I started using digital more and more as the backup system for my analog notes. And here's an example of it. I use Bolger journaling during meetings to capture what's going on and action items and things like that. But I don't use the bullet journal to track those items down to completion. What I do after the meeting is I'll use something like Google Keep just as an example. Take a picture of the notes and then add checklist items at the bottom of the Google Keep note for all the action items that I have to do the things that require tick boxes. What that does is one it gives me text that's searchable, to give to me an actual

photo backup of the handwritten notes I took. So I don't have to transcribe all of them. And three, it makes them makes it now accessible wherever I need it whenever I need it, but don't lose the flexibility of the handwritten notes. It's not perfect. I mean, I get arguments all the time. Well, why don't you just take it all digital in the first place? Well, because I don't want to. And I'm a grown up, and I'm allowed to make that choice. So I take it analog, and then I've started backing up. And it's been working really well for me, because it's that problem we have with analog where it's like, how do I get this thing to remind me that when I walk into the grocery store, I need eggs, a paper notebooks going to do that digital will, assuming you have signal, and I'll get up on my soapbox for a minute, I have to take a paper grocery list into my grocery store, not because I want to, but because by the time I get back to the meat counter, there's no signal. So no matter how good the digital tech is, it's you're going to fail us at times, we still have to think about our backup processes one way or the other.

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Augusto Pinaud 25:06

Well make a great point in there. Because I want to because I like and I think that's one thing that a lot of people need in all these productivity world. What can I do, you know, this mode with a different platform or even a paper, I don't want to carry paper, I have lost enough paper in my life. But also, I love to play with my wife, I love her design. So so that that because I want to emphasize it is really, really important. And I believe something Key Point productivity. Remember, once again like to you know, if you are the guy, or the girl who love to play with markers, and honor, carry all the details, the matter of how many of them you're willing to carry. But you need to make this thing work, you are going to be the one who interacts with states all day I have worked with people. So well. notebooks need to be digital. No, you can go to a solution, like what you're describing, take a picture of in, you know, once a day, or every two hours or whatever, every time you're going to move out of there. That way to keep a digital version of a copy end to or don't take risk. But make sure that whatever you're going to use is something that you like and that you like to use, and more importantly, that you are enjoying using.

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Art Gelwicks 26:45

Yeah, I couldn't agree more if if you don't enjoy using your system. And I know that sounds funny when you think about work. But if you don't like using the tool, you're not going to use the tool. I mean, that's what it comes down to. Whether it's digital, whether it's analog, whether it's iPad, whether it's fountain pen, it's not going to matter. If you don't enjoy it, forget it, move on to something else. And that's okay, take that step, make that migration piece, I use a Chromebook for pretty much everything I do, I run my entire entire business on it. And I do it not because it's the best platform. But because I like it, it does

what I want it to do, and it doesn't in a way that makes me happy. So that's okay, find ways that these systems will make you happy. And when it comes down to organizing, organizing your notebooks, you have to follow the same approach, you have to find a way to organize your notebooks that you're going to be happy with how it works for you, not based on somebody else's structure, not based on a predefined methodology or workflow. Now, use those as examples and starting places. But when I think about my one note notebooks, I have a one note notebook for everything that is not work or class related. All my personal junk goes into one one note notebook. Why because I know that notebooks synchronize to my phone, it's always accessible. Good, I got it, the client stuff, different conversation, because I may have to share that I may have to print it out, I may have to back it up or you know produce it for legal reasons. They don't need to see my home repair lyst mixed in with that stuff. So it gets stored in a different place and handled with a different place. But it still comes back to is that what's going to make me feel like I'm being productive. I'll be honest with you right now I'm changing my system up. Because I don't feel I'm at the level of productivity, I want to be based on my current workload. So analog digital, doesn't matter, you're going to tinker with it, you're going to make it make it fit what you want to do, just don't freak out when it does, it's not a perfect fit. Remember, it can be adjusted,



Augusto Pinaud 28:57

understand that whatever system your main work, is maybe even really aligned while but eventually it may broke down. And it's okay. It's not that you're doing anything wrong, right, these things are going to change and evolve, your needs are going to change on the call, you need to understand, hey, you may be able to do it in Evernote for the longest time and then suddenly, you're going to need to go and change to what notes are going to work better or two of these are today. And you need to be okay, understanding that that change is not necessarily bad. One, he's justified, the problem is the mind that change the strategic or a way to procrastinate not to do this stuff in God knows undiscovered, your list is really, really thin. And that's where you need to be really



Raymond Sidney-Smith 29:55

I couldn't agree more, there's a there's a factor where you decide that you're not being as productive as you want to be in the case of art. And the change is going to be a productive game for the time and investment spent in changing. And then there is change for the sake of it. And this there's there's actually an exception there also though, but because I see a lot of people where they see their system working, and it's fine. But actually the excitement of of the system diminishes. So they actually start to be less productive, less motivated, to get things done. And it's actually the change that allows

them to kind of jumpstart their excitement about being productive.



Art Gelwicks 30:39

If you look at the analog bullet journal world and just do a search on bullet journaling, a lot of the images you see come back have nothing to do with being productive. There are ways to decorate a notebook and put in washy tape and your colored pencils, watercolors, you know things like that. And a lot of people look at that and go, what the heck does that have anything to do with getting stuff done, but it does, because it for those people, that creates the positive motivation and reinforcement to use the system. And if that's what it takes, do it. If that keeps you on track, do it, it's the same thing I do with to do list to do is karma reinforcement to me is still that little kick in the pants that says Yep, I'm going to beat that thing, I'm going to get Grandmaster status. And keep doing that. So when it comes to notebooks and the notebook naming, I gotta admit, I struggle with naming quite a bit. Because there's a balance point we have we think about some systems that are focused around the title of the note, and the title of the notebook to be able to identify it and search for it. Others are plain text within the notes themselves. So what I tell people is, look, forget about searching the context, if all you had is a list of your notes, could you tell them apart? And if so, how well can you tell them apart? If you have 14 notes in a folder in a notebook that says meeting minutes? What's the value? You need that visual cue and connection. So standardizing on a naming convention, personally is big. If you're going to expand this to a team now, it's huge. Because it's like having a little kid at a family reunion. Everybody calls him something different. The kids look around at you like Who should I go to?



Raymond Sidney-Smith 32:26

Yeah, I think that the the naming of notebooks is, is actually really important. So I'm going to give a couple of thoughts here. And and this will spark some conversation, of course. One is that when you're in a digital notebook environment, some systems allow you to be able to sort differently than alpha numerically. But I'm going to speak from the Evernote side, since it it is going to always sort alphanumeric Lee, when it comes to stacks and notebooks. So you can do a couple of things, right, which is you can put either ABC in front of the names of your notebook, so that they order correctly, you can put dots, or other types of punctuation that sort those those most important notebooks to the top. And for me, I actually always use the letter Z. And before the word archives, or archive for my notebook. So my notebook is called z archives. And that just pushes the archives notebook to the bottom of the list so that the notebooks which in my case is my inbox, it floats to the top. And I've actually stopped doing that now, because I don't have the

ability to create shortcuts in Evernote. So I just drag the inbox notebook up to shortcuts. And now it's at the very top of my system. So when I go to process, right under shortcuts, right at the top of the of the enough left panel navigation in boxes right there, so I don't even need the data anymore. But the point is, is that you can drop things, or use the at symbol, whatever, whatever you want in terms of a punctuation mark that will go into your system that will sort of to the top and z to the bottom. Then what again, going back to kind of what I was talking about before, I feel like sitting down and looking at your the areas of your life, and they could be major projects that you're working on. They could be various aspects of your life, it could be you decided that health is something that's very important to you. So you might have a notebook or a stack dedicated to health. And you may say family or your spouse or partner, you might say finances or money or whatever, that's an area of your life, you can actually look to the the Chinese concept of the Bagua. It is an eight sided diagram that shows different areas of life and people typically know this from Fung Shui, and the idea that that you know people place this Bagua over their home and, and identify these various aspects of their life and physical space. Well, you can kind of do that same thing with your notebooks, you can look at the Bhagwan it the air aspects of your life, you can kind of make those as your notebooks are your stacks. So then you have at least a basic structure. You can modify it from there, and it's going to change, there's no question about that. But at least start from someplace that time immemorial has given you I mean, the bug was over two or 3000 years old, it's been working. So, you know, you may you may want it to be different as you move forward, but start start from a place of solid, solid history and solid background, Stephen Covey, Dr. Covey gave four quadrants. So you, you have a lot of, of foundations out there look at look at examples of the ways in which people break up their lives. And at least for your, for your notebooks that, you know, management, you can then use those major projects, as I said earlier, can really work here. Because you can you can decide, okay, I have a major for major projects, I have a notebook for each, and and kind of go from there.

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Art Gelwicks 35:50

It's interesting, because it actually dovetails into something I've started doing recently, which has been helping me out a lot with this. We have with digital notebooks we have tagged in most cases will have context and things like that, I've started creating table of content pages. And those table of content pages can go anywhere in any notebook. And they provide me relative and relevant collections of other notes based on what I'm doing. So for example, if I'm heading into a meeting, I'll actually have a table of contents pages or page for all the notes I'm probably going to need access to during that meeting, can I get to them in my notebooks? Sure. But why not create a context, why not create this aggregate that's going to make my life easier in that session. So I can jump to a one note page or SharePoint page or wherever I need to get to during that session. Rather than

saying, hang on, let me find that in one note. It's fast, it's faster, it does take a little prep, but I can then use it again later on. You're right, finding those contexts, whether it's based on something that's 2000 years old, or whether it's based on you know, the layout of your house, or whatever you're going to be doing in a given weekend. That kind of aggregate don't feel like you have to have a locked structure. That's one of the big benefits of digital over analog is you can keep changing it. And analog, you can spend quite a bit of time layout a very nice organizational structure. But there is no hot linking. I mean, I can't click on a page and wind up on another page. There's some techniques that make it kinda like that, but it's not the same. So why not take advantage of those pieces.



Augusto Pinaud 37:32

And that's part of that Corporation and to really make a difference to them. The day is wizard digital has said you can go copy paste, you know, reorganize or make as you're getting ready and preparing for that meeting, making those hugs links or even creating a special note for or note for for that meeting. So by the way, you have the information that you can for senior going to use. And then being able to not only to use the time during the meeting, be have a much more pleasant experience while you are in Madrid. You know, instead of thinking of I know that information somewhere into this notebook, or somewhere in my email, or somewhere in my office, I can refer to God wondering and really allows things to move forward.



Art Gelwicks 38:23

The same thing absolutely applies in personal productivity. If I'm going to end in a few weeks, I'm going to be dropping my daughter back off at college, I take her out there I have this whole list of things that have to happen there in all different kinds of notebooks, summer financial, for the college, summer packing list, summer travel things, they have their own sections within my system, but it's all tied to one event that's going on. So by putting these things together with relevant connections, I've gotten myself much more productive because now I don't have to find this stuff.



Raymond Sidney-Smith 38:54

And art can add have coffee with Ray to



38:57

Absolutely, it's gonna happen.



Raymond Sidney-Smith 39:00

Let's talk a little bit about tags and notebooks because I think that we we kind of touched a little bit on notebook naming, naming and that tags are available. I would like to talk about the importance of differentiating notebooks from tags, why tags something in a digital environment that you otherwise wouldn't do in a paper based environment. Similar to hyper linking from one thing to another in the physical world really doesn't work very well. There are some techniques as as art said, but it's not the same. What's the difference between a notebook and a tag in your system,



Augusto Pinaud 39:40

I don't use them as much on the only thing for what I'm a heavy user of tags is when I'm doing research. Okay, mostly because allow me to create certain tags and then go back to that is Pacific place from looking for information. But I am not a heavy type first may have never been. So I don't know how to tell you. To tell you about that. I'm not that great about it.



Art Gelwicks 40:07

I use tags a lot on the digital side. Because it gives me contextual relevance without having to worry about, do I have the right keywords within the body of a of a note to be able to search for it later, I have a consistency. So for example, if it's related to a particular client or project, I'll tag it with that client, the clients name is probably going to show up in the notes somewhere, but probably isn't good enough for a reliable system, I do want that level of consistency. Now flip it around analog I tagged two. But tagging in analogues a little bit different. best example I can give you for taking you an analog is take any paper book, open it up, especially nonfiction, open it up and look at the back of the book, the index is the equivalent of tagging. Because what it's done is it's reversed the tagging process, we think about tagging in the context of the item itself. Here, what it's doing is pulling those relevant keywords and giving you that reference list as to where they they show up. If you're doing an analog bullet journal, that's one of the ways to do that is you create an index page within your journal. And you indicate what pages in the journal show up for what term. So if it's related to a particular client, and I've made a note in my bullet journal, great, I go back to the index where that clients listed and I put that page number they're done. I've tagged it, it's just backwards to what we think



Raymond Sidney-Smith 41:31

I would agree with you art. And actually, I believe that in a digital notebook management

system, you actually also have to have indices for your tags, I really fundamentally believe in the idea that you should have Table of Contents notes for your notebooks. And you should have indices for your tags, the idea of making your tags on the fly is going to create more havoc down the road, because then you see just a pile of tags, when you look at all of your tags together. And you don't know why you created them have a purpose for those tags, don't just start adding keywords to your system as tags because that's what searches for. If you're just adding words that you think you're going to look look for later down the road. As you make them, you're going to inevitably put tags that are allies. So instead of just you'll have tags and tags in your system, now you've made both tags useless. So you really need to start thinking about tags from a perspective of how how are they going to do two things, organize and filter content, cross notebook, so that you can because tags Can you are typically searchable across an entire system. I'm talking specifically about Evernote here, but one note is the same, I suppose you're you're trying to look at these these tags across the system for being able to organize and filter so you can find things surface them quickly. But then, from what I consider more of an ontological perspective, which is what what is the workflow? What are the steps or milestones along a project path? What are the what's the priority of something? How are you measuring the workflow of something. So for example, you if you have step one, step two, and step three, you can have notes in a notebook that actually cover each of those steps, and those notes associated with those things. So each note that is in step one, you can tag those, and now you know how many things you have in step one, or or in milestone one, so that you're able to then understand, okay, well, if I have 20 clients, three of them are in step one, you know, seven of them are in step two, and 10 of them are in Step three, that allows you to really start to manage your flow better, and identify where people are. So you can you can look at it from a from a, an organization perspective, where do things fit in my life, but also, where do they fit in, in the project path. So So consider that consider those as well, I will make one other note for tags is, which is that I always create tags for things I don't want to see. So you can make this again, using the the letter Z, I avoid the letter Z because I use that already with z archives. So I chose x, I don't know why, but I just chose x. And so I tag everything that I want to archive or make a status inactive as x. So I just tag it as x when I don't want to see it anymore. And what that allows me to do then is once I've tagged everything is x in my archives notebook, which you know, during my weekly review, it's just a checklist item, you know, Command A or control a tag, everything is x that's gone into the archives notebook from the prior week. And all of my saved searches, have a limiter for tag x. So it never shows up in my system, I never want to see my archives. And if I want to look for something in my archives, all I have to do is look for that which is in the archives. So it really helps to manage things. And that that keeps that keeps a clear boundary between the two because most of these no taking software, do not have a an archival function where you can actually take things out, other than to export the data. But that's a that's a nightmare. I actually just went

through that with a client. And it takes a lot of time, a lot of energy when you have 10s of thousands of notes and data held within them. You know,



Augusto Pinaud 45:28

I said on my notebooks. I don't have that many tags. But I noticed you were talking on my journal. I mean, you're known for a long time. And that's where I have the time. And and I wanted to reiterate what you said, You know, I don't have that name. You know, I mean, specifically on they want been journaling since application came out. And so I don't know, five, six years, I have tons of entries. And I was opening here on my iPad to see how many times I have. And I was pleasantly surprised that I have 22. You know, it's not that I don't use them. I like some of them. Because they allow me to go back in the journalism world to things that were important or are important. But I wanted to read three.com and make Be conscious about those facts. So they keep their power. Because if you have 22 and four years, that's not that many you can find that information. If you have 200. Well Forget about it. I wanted to make the point, remember, you know, it's about you know, one of the things I really love about the piece of software I use is that I can use custom design paper, okay, I can sign the paper or get the paper I like and put it into digital and right over. That, for me is an important issue because I use different notebooks for different purpose. And I like to have that information. For example, on my work notebook on the left side, the top left, there is information that I want to have a hand in our hand the whole time. So every time I create a new page, all that information is there all the time. Why? Because it's much better than hapa posted around that I won't necessarily like so make sure that whatever tool you're going to use, you are going to make something that you are going to have fun.



Raymond Sidney-Smith 47:27

Absolutely, absolutely. This has been a really fun and interesting conversation. So thank you, gentlemen, do you have a question or comment about this cast? After listening to us discuss managing digital notebooks. If you're listening from anywhere other than the podcast website, I invite you to jump over to productivity.cast.net and just type in the episode number or it's probably the most current cast on the cast page there at the bottom of the page. Feel free to leave a comment or question. One of us will be glad to respond here on the productivity.cast.net website. You'll also find the show notes and links to anything we've discussed. So you can jump right to those from the show notes section. Do you have a question about personal productivity Generally, we really love hearing from you so please visit productivity.cast.net forward slash contact and you can get in touch with us you can leave either a text based message or you can record your audio message so you can record audio message and leave us a message by voice thanks to Augusto and art for joining me here on this cast today. And if you could please add a

rating a review in iTunes, Google podcast Stitcher, wherever you listen to your podcasts. We just enjoy the the props, we love the encouragement and it also helps us grow our personal productivity listening community. So thank you. That brings us to the end of this episode of productivity cast the weekly show about all things productivity, I'm Ray Sidney-Smith joined with Augusto Pinaud and Art Gelwicks. Here's your productive life.



Voiceover Artist 48:53

And that's it for this productivity cast the weekly show about all things productivity with your hosts, Ray Sidney-Smith and Augusto Pinaud with Francis Wade and Art Gelwicks.