128-productivity-taxonomy-part-2-productivitycast

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SPEAKERS

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

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V   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. ProductivityCast the weekly show about all things productivity, here are your hosts, Ray Sidney-Smith and a Gousto pinout with Francis Wade and art Gelwicks.

Raymond Sidney-Smith   00:17

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

A   Augusto Pinaud   00:22

I'm Augusto Pinaud.

F   Francis Wade   00:23

I'm Francis Wade.

A   Art Gelwicks   00:24

And I'm Art Gelwicks.

Raymond Sidney-Smith   00:25

Welcome, gentlemen,

Raymond Sidney-Smith 00:26

and welcome to our listeners to this episode of ProductivityCast. Today, we're going to continue the conversation that we started last week. So in our last episode, we opened up the dialogue, because of a topic are brought to the team and wanted to discuss and that was all about tagging in our personal productivity systems. And we discussed really what productivity tagging really looks like, what does what does a taxonomy really stand for in a personal productivity system, we talked about some of the topics relating to it, but we really didn't dive into how we all use tags on our system. So I think that would be a really great conversation for today. So how do you tag and use tags in your personal productivity system

Francis Wade 01:08

as little as possible, whereas you can tag everything from now until the cows come home? I think the purpose of tagging is, as we discussed in the last episode, to be able to manipulate large volumes of data by focusing on some smart attributes. And I think that one of the rules I have is, and this was from bitter experience of trying to use multiple tags, and all sorts of fancy hierarchies and tags, using attributes that were the most interesting is that we should be always aiming to use as least the least number of tags as possible because they extract extract such a cost. The managing tax isn't easy for us psychologically. And we should be looking to manage the minimum number possible to get the biggest benefit. There's a Pareto effect. In other words, so this is not a matter of and I see people asking questions all over the internet, you know, what should I tag? Should I tag this, I'm tagging with 10 different attributes. No, whereas they may be cool, and they will be fun. It is a utility problem. And we have a capacity to the number of tags that we can use. So my first technique, whenever I go to tag is use as little as possible, minimum number that I can get away with and still be effective. And then I'm going to add another level of tags or another dimension or degree, I think long and hard before doing it, and usually don't.

Raymond Sidney-Smith 02:36

So what are the areas though, that you do use tags, from what

Francis Wade 02:39

I know everybody tags, tasks, but they don't necessarily put them in a system. So in their mind, there is always tasks tagging happening all the time. And the same principle applies. You could tag your tasks in any number of ways. But the question is, Which one will you use? That will give you the practical benefit? So I use temporal tags, mostly? Few others occasionally. But temporal tags are duration, start time due date, its placement in a calendar relative to other tasks. So they're non overlapping, and so that there's they cannot be done at the right time. Temporal tagging is what I use mostly,

Raymond Sidney-Smith 03:20

yeah, you bring up an interesting point, which is that you're you're talking about tagging from a time perspective, even a start time is that is that because your tool includes a start time field or you applying a tag as to when you actually plan to start that?

Francis Wade 03:36

Both? Yes, I did it before I got the tool. And the tool allows me to do it easily, more easily.

Raymond Sidney-Smith 03:41

Because I have a start time field and a due date, you know, completion date field in my Task Manager, which happens to be Remember The Milk. And so the so the idea of having a tag associated with when something's going to be done is more like morning, afternoon evening, kind of having a tag that tells me this is a block of work that needs to be done in the morning, or is the best time to be done in the morning, both for energy for performance management, but also for when it's likely is to be done. I try to use those tags for management of putting what should be in the right places in the right places. And even to this day, I've now chosen in Remember The Milk you have priority one, two, and three, and then no priority. So that's just color coded. And it's the way in which it sorts in the system. And I've chosen to apply that as the three parts of my day, as morning, midday, and really afternoon, evening, before I close out. And by placing those things in that timeframe. It gives me a fourth kind of block of time, which is end of day. So anything that is no priority ends up being in that. Well, you know, after dinner, I'm going to do these few other things in the evening. And that's going to fall to that point. So it actually color codes them and blocks them in that timeframe. So it's not priority anymore for me that the tag is that color, and grouping of those things in those sections.

Francis Wade 05:07

If you could change the tag, you would really able to Morning, morning, afternoon, evening, after evening, but it

Raymond Sidney-Smith 05:14

doesn't matter to me because it's the color is 123 and zero. So that's really no, you know, there's no words applied to it. So it's just literally the color and grouping of the lists, which is perfect for me. And that also translates well over to when I print. Like, if I were to print the checklist, that's all going to manifest on the printed checklist, and I frequently will print it to PDF, so that I have that available to me to markup on my tablet. And it's really nice to have one, it's, it's just like one of those days, I've got a lot to do, I will literally print the the task list to PDF and put it on the tablet. And now it's in there and I can mark as I go, which is really nice. So you're

Francis Wade 05:53

doing it by handwriting, you got it. Yeah, I wish I had something, something as sort of easy as that each of each. Anything I've tried to do to grab a calendar and have it in front of me easily turned into more of a hassle than anything else. So I pretty much just leave within Google Calendar, wishing that I could have it somewhere handy in front of me that I could mark it up in the same way.

Raymond Sidney-Smith 06:12

But so Google can email you a daily agenda. And then you can automate the stuff from receiving the email, you can just click Print to PDF,

Francis Wade 06:22

what I really want, I wanted to print a piece of paper that slides under the cover of my desk, which would be transparent, without me having to press any buttons. Okay, well, that's, I want something that I don't have to touch, because the printing and the messing around the paper or the PDF is all too much friction to do on a daily basis to

Raymond Sidney-Smith 06:42

be alright, anything, anything else about how you use tags.

Francis Wade 06:46

And one more thing, which you brought up, which is one of the features of Scalpel. Scalpel is an auto scheduler. And it allows you to build a time map. So time map is essentially a list of preferred slots in your calendar. So that you can build several time maps, all of which are focused on some attribute like energy or time in the office or peak time for thinking or downtime for reading. So it automatically tries to use the time map that you assign a task to schedule that task in a sort of a zone of time throughout the week. So that's a very big attribute that they've introduced and use heavily to come up with an auto schedule whenever you're personable. So that's another one that time map art, how about you,

Art Gelwicks 07:40

I'll pull this through three different applications that I typically use tagging on. And it's important to understand that, to me, tagging is useless without filtering. Because that's, that's what makes this applicable to getting at your information more effectively. So when I think about tagging things, and I'll start off with the one application I deal with all the time, which is one note. One note, it's a love hate relationship with tags within OneNote. Because they don't use the normal hashtag functionality, you know, put in a term, they have a part of the application that allows you to define tags. It's nice because you can define graphics that go along with a tag a color scheme that goes along with the tag, and then apply those tags in multiple places within a note. So you can have multiple tags at multiple spots, and then be able

to query back against those do a filter and say, show me all the question tags, for example, and pull those line items back. Problem is is those tags don't sync. So if you're using Web, you're using the desktop, it doesn't carry around, which makes it kind of difficult to really utilize their tagging functionality. But it does have that advantage as we talked about, it forces you to be very judicious about what tags you're going to use because they have this centralized structure of creating the tags and assigning them. They also have a nice feature that I wish I wish more applications had that have centralized tag management. They can assign hotkeys to tags. So you can have a particular tag and it's going to be a control to control three. So it makes it very easy to go through a rapidly assign core tags to things. Another application I use workflowy workflow is about as as minimalist. I know you hate that term, minimalist and outline is possible in structure. But it handles hashtag tags extremely well you just drop them in, and they're clickable. So if you click on a tag anywhere within an any note, it automatically applies a filter around that tag and you get that subset set of data that it does not have any sort of centralized tag management, which I agree is very important. You have to create somewhere in your system to start keeping track of those tags. Oh, to go back to one note, real quick. One thing I did not mentioned, and I believe this is the case, I didn't verify it. But I'm almost positive, this is the case, you can have separate sets of tags per notebook. So you could, you know, build out a client notebook and have tags for them. Now, granted, that means you got to mentally keep track of all those tags. But it does mean you can focus around those key areas, the other applications have tags across the entire application. So workflowy, like I said, straightforward, hashtagging type of Things To Do List, which is my task manager has tags built into it as well, you can create tags and assign them up. But it really all three of these come back to the same basic requirement. When I tag something, I am basically creating another perspective on that information. If you use the old Star Trek analogy, or analogy of three dimensional chess, that's exactly what this is, is I'm taking my chessboard and adding another layer to it. And I'll use the example of within Todoist, I have a project, which is one of their core structures for shopping, things that I need to purchase, every item that I need to purchase goes into that shopping project. But each of those items is then tagged with where I can get that item. What that allows me to do is if I'm out running errands and I go to a store, I can then say, Okay, what's everything that I need to purchase that's at this store. By having that tag, it gives me that altered perspective, I can still have items that are in other projects like things to review, while I may review something that the tag says where I purchased it. So when we ask about, and I've mentioned this before, when you ask about how do you define tags, I always use the argument, if you've searched for something more than three times, you've already defined a tag, because you're going to be going back and looking for that again and again. And that that is the candidate for the tags.

A Art Gelwicks 12:08

It's not, it's not a difficult thing. But I think you guys, the the ability to get overwhelmed by the number of tags you have, can be really problematic. And I, I kind of like the way that I have to deal with it and workflowy because I have a note in workflowy, that's nothing but tags. And I can keep, I can just add tags there. And then they're accessible throughout the application. To do us works fine with that, too. I can create listings of tags. What I like about to do as functionality is you can create filters into Todoist. That will filter based on time based on project and based on what they're referring to as labels or tags. So again, it's that additional perspective on your information as to how you're going to use it. It's not really part of the information. But it's what makes it more useful.

Francis Wade 13:00

There is tagging for retrieval, which is what I think you're talking about art. And then there's tagging so that another agent, body or software can then manipulate the activities or manipulate the objects. So scared as an auto scheduler is manipulating your schedule, and you're telling it how to do it through your tags. That's a different activity than you're searching for by tags. It's it's a different, it's a different way, of course, a different reason to use tags. And you as a result, you've got to be, you've got to be really careful because you're telling the program indicating the program. Here's what's in this time map, here is what the duration of this task is. You can also put priorities to flag items, here's what our priority is. So you're you're feeding it into the program, which then manipulates your calendar. I can't think of any other apps like that at the moment. But I think tags for the purpose of searching versus personal searching versus tags for the purpose of indicating to a program what it should do with your information or desire. It was a slightly different it seems to me.

Art Gelwicks 14:20

There is an application that I desperately wish had tags and does not. And that's Google Drive. I wish you could tag files in Google Drive because I think that would make it infinitely more useful. And the reason why I say that is because that's one of the key things in the corporate space that we're always beating into people's heads is don't use folders. Don't use folders. Don't use folders unless you absolutely have to use tags and metadata. That way you can manipulate your files. Then we have something big like Google Drive and it doesn't do tags. It does descriptions and you can search based on descriptions and I guess the idea is that you can search for anything. So therefore you don't need tags. But as we've talked about so far, that's not the case.

Raymond Sidney-Smith 15:06

Yeah, so akin to Google Calendar, I just use a symbol, and then a set of characters, in order to be able to do that filtering in Google Drive. And I have for years, since I realized that you could look at any file inside of Google Drive, and you can have that description. At first, I was actually naming documents that way. But of course, that's there's a aesthetic, you know, and a confusion to the to the collaborator. So I was only using it in my own internal system, I was tagging inside the the title of the documents, then I went to using the description. And now throughout my entire system, you'll see those description tags throughout it for my own, again, own internal purposes, because it's just so helpful to be able to do that you've been talking about this concept that I've had for many years, which is the three apps of tagging, tagging, for me is for three different things, finding, filtering, and framing. And so the idea here is that when I am looking for something, I have the faculty of being able to filter, but most often than not, the primary goal of using tags is that I can quickly group things together and be able to find things. So I'm in search of something, filtering is that I want to see everything but these things. And I never want to see these things otherwise. So for example, in my own system, in in Evernote, particularly when I'm looking for something that I not want, in a context, I want to be able to work on something many times, I don't want to see certain things. And so I will use the ability in Advanced Search to be able to remove things from view, that's the filtering function, right, I want to, I want to only see these things, and I want to get rid of this other stuff. While I'm looking at it, for example, archived items. So I have inactive or archive projects, I don't want

to see those when I am doing active work, I can filter things out. And then finally framing. And that's all of these ideas of applying metadata to the environment to tell us about temporal issues, to talk about location based issues, to talk about what types of work we're going to do, what types of action we're going to do, and that kind of grouping. And so it tells me the location and space, the energy in which I'm in, right, I'm in a high, you know, mental space, I want to be able to see those things that I can do in that space. That's the kind of of usefulness for tagging, in that sense. Or this is family stuff. This is work stuff. All right, that's, that's a frame with through which you're looking at your data. And so finding, filtering, and framing are really the way in which I, for lack of a better word frame tags for my own system. I will say that in in my world, I use tagging robustly, I probably am different than Francis in the sense that I think about every opportunity to tag and not necessarily because of the overhead of doing it manually. But because today now, I'll snap back, which is to say that when I started the concept of understanding what tags were in my world, my head was blown, right? It was just like, oh, my gosh, I can actually connect different disparate pieces of data through this centralized bit. And I decided that I would create these indexes, and these indices would manage my world. And so for me that started off with what you would consider like categories of life in the Tony Robbins world, or the various areas of your life and Covey. That led on to the David Allen concept of areas of focus and accountability. Now, others notice areas of focus and responsibilities. And the notion now was everything needed to be connected to one of those, and that was the primary framing tag. But then I realized that I could also frame it by action, not just by organization. And so I started to go through and think, Okay, what are the what are the the processes that things are in? What are the states of that things are in and that would become a frame for me. So now I have certain things that work through, say, for example, you had a checklist and everything was was kind of in a grouping on that checklist. I want to know when any project in that state of the checklist is in one of those groupings. So if you had phase one, phase two, phase three of a project, and it's all the same process, you know that it's going to follow that lineage. Then I wanted to make sure I knew where any given project, if I had a dozen of them if I had 50 of them. If I had 500 of them. I wanted to know where all of them were in their state. And so by applying that tag, it gives me a very quick view of all of the all of the projects that are in that state. And it's so helpful when you are managing a large number of projects. And, you know, when I started this process, I was in real estate. And so I was managing hundreds of real estate transactions at any given time, I needed to know which ones were closing tomorrow. And I needed to be able to see that immediately. And so being able to filter in that particular system, at the time, I was using a product called Time matters, I would be able to just immediately grab that view and know, okay, that's everything that's in this particular environment. And now I can deal with each of the issues, to move those transactions toward closing. So just thinking through how you plan to use tags, and also akin to what both of you have been talking about so far, which is that your tool and the tools you plan to use matter so much when it comes to how you're going to manifest the tags, and manage them. We'll talk a little bit about that at the end. Because I think it's really important for us to manage our tags. Well,

A   Art Gelwicks   21:03

I love this show, because I always learned something. And I just found a feature in Google Drive that is not tagging. But it's pretty darn close, you can take a file. And if you hit Shift Z on your keyboard, it allows you to designate another location in Google Drive. To create a shortcut. Yeah, well, if I create a folder structure that emulates my tagging, I can create shortcuts in those folders to the original files. So if I have a file of all my, let's say, tax documents, and I have all my federal documents in one spot in my state, and one of my local one, I can create a

folder for 2019 and create shortcuts to the correct ones. That's basically tagging, but not quite, but it's pretty darn close. So I learned something. And um, hopefully somebody else learned something, too. Yeah, that's great. I got excited.

Raymond Sidney-Smith 21:58

No, I think it's really important. I don't really I recognize that more people don't know about that feature, as as many people as should know it. And I do it in my own trainings. And I always talk about it, but it's been around for a long time, it's changed names, but now it is shortcuts. And you are able to not have redundant files. And that also helps in family settings. And in work in work settings, when two people have either equal or deferring hierarchy. Think about organization differently. I might organize my world by my life domains. But that doesn't mean that you do. If we have to share documents, that can be very frustrating. Well in your system, you can actually create the hierarchy the way you want to in shortcuts, and then the source documents can stay the way they were they are for me. And that can be really, really useful. So shortcuts are very, very powerful tool for so many reasons. Because you want to have one central source of truth, you want to have one document, you don't want to have 15 of the same document floating around. And that really gives you that power. So for anybody who doesn't know about Google Drive shortcuts, now you do moving right along, I wanted to talk a bit about teams and how teams tag I mean, this is actually a really good segue for talking about shortcuts. And this whole idea, how do we overcome the concept of organizing this metadata, this idea of, of a taxonomy? And in a team environment, how do we organize around and with tags when we're working in groups,

Art Gelwicks 23:32

that's a really hard one, because that's not something that I hate to say it, that's not something that can come organically. That has to be a team consensus, or often it's an operationally structured requirement. These are the tags you will use for this information. And that's partially because you want consistency across the organization. Somebody comes in new hire, this is what you teach them structurally, this is what you're going to use in reference, this is how you find your things. But also for business continuity, as time progresses, I should be able to use that same structure. The problem is, is if people are able to define their own tags, which you do want them to do in some cases, because they need tags on the fly, you lose that continuity over time. So it's, it's really important, at least in my mind, within an organization especially around adoption of technology or just flat out project management. As part of your standard operating procedures, you define what certain things will be tagged as there should be an open area for additional tagging that can be used that's not across the organization, cross multiple engagements, but localized within that particular project. But standardize across your project charter. There should be a tag for that so that you can find every project charter in your organization. through a click of a button that's important operationally from a team perspective, but it's tough, you have to have those discussions, it almost becomes a governance exercise within any size team that you have is you, you say, Okay, we're going to start tagging things for this for that for other, you know, source code deposits, or drops, we're going to have, you know, racy documents, things like that. So that you all agree that this is how you'll tag it, the hang up is, is that you then trust, but verify, you have to make sure people are using tags properly. So whatever application you have, that's an important function to make

sure that it can do is bulk tag changes, selecting all for a tag, and then be able to flip a tag to another one. Because if you have to go through them individually, you'll never do it, and you'll miss things. But if you have the ability to do bulk tag updates, that that can go a long way.

Raymond Sidney-Smith 25:56

I think it depends on the system, and how much flexibility you have with the system, and the culture of the organization, those two things will ultimately dictate and I think, in reverse order, the culture and then the system. But the idea here is that at least in my organization, we're fairly small. So we're capable of having that kind of granularity with with the entire team. And so we have a master document, that is our index, our tag index, and we have all of the tags that we are bound to use in any given environment, and is a mandate for me. And so they are used because I want to be able to find things, filter things and frame things appropriately in the company. And I can't do that without it. And so we actually started, the first hierarchical tag index was actually used for the different areas of the company, so that certain things were in the right buckets, in essence. And so those actually ended up being two part because in my world, I tag the same as creating the nested structure, the nested buckets, right, so I think of folders or notebooks in those in that sense as really a containerizing of, of data. And so I structure that part, right, every project should have this structure. And that's important to know. But then I also tag everything that might be related across related, right. So you might have in human resources, some finance information. And so I want to be able to find the finance information that lives outside of the finance bucket, right, that container is not holding all of the data, and I want to be able to find that cross functionally. And so that's where those pieces come together and become useful. And this is the thought process, you need to think through what are the areas in the company in which you want to be able to find things that are cross department, cross division, those kinds of things? And then think, okay, what are the things you don't want to see at certain times for certain people. So for example, I have certain filters set up so that the staff doesn't see certain data when they do certain searches, because it's extraneous data, they don't see it at this at that time. Now, there are other functions that you can use in systems, you know, like, you can just not share particular types of data with certain types of people, typically, in human resources. And in finance, you're not going to share that data with everyone in the company for various, you know, legal and regulatory compliance reasons. And so what do you need to do in that sense to be able to make those things useful, and some tagging facilities actually are bound to permissions. So you can actually do that in that sense, as well. So it's just creating the right amount of understanding behind what you need to find what you need to filter in as a team to get those things together. And then last, but not least, I think, again, just a project status, who's on point to run that project forward, who's the lead, and who is currently working on the project, those are two different tags that I like to always see. And most systems now today, give us at least that facility in some way, shape, or form, for example, in Asana or Trello. You're capable of assigning a person to a project. And that's really useful. Sometimes the person who's pushing the project forward or working on that project right now is not the owner of that project. So you need to be able to say, Oh, this document someone's working on is, you know, Susan, but Susan is not the is not the owner of the document. How do you let everybody know about that very quickly, so that you can see all of the documents that Susan is currently working on. That's where tagging can be really, really powerful. So you're able to see what her workload is right now. So you can say, oh, you know what, she's got 15 documents that she's working on it at the present moment. That's probably too much. Let's see if we can't offload some of those other pieces onto someone else, and really give her the priority in that sense. So being able to identify who's working on what through tanks can also be very powerful.

Francis Wade 30:05

I'm in a mega small organization, there's only two of us. But we don't use tagging between the two of us. But you said team, and I thought ResearchGate. And if any of you guys are on ResearchGate, they unfortunately, they restrict membership to members of faculties of universities. So you need a university ID or a university email to actually join. But anyway, the power of the thing is that it's a clearinghouse for all research, which essentially, is saying that you've got to tag your research accurately so that other people in your field can find it. And it goes, the next step, it tells you when there is research that applies to tags that you've specified are important to you. So it keeps you in the loop with respect to all the most recent publications. So that's more towards the framing, I think, and kind of what I mentioned before is that tagging allows a an app or a program to accurately use your information. But in the absence of ResearchGate, what we'll be using will be going back to original documents and having to go back to the documents that are cited at the end of the paper. And that process takes a very long time, as you guys probably know, it's it's it's painful to do research that way. But to join a group on ResearchGate, or an interest area that constantly updates you on happenings in that field, is an amazing time saver. So it's a huge resource. There's another similar one called I think it's called academia.com. That Edie maybe.edu or.com, but it's similar to ResearchGate. But the two, the two are basically huge databases, which rely on accurate tagging by the people who input data and input information articles I've written. And people have picked them up because they're doing searches for particular particular tags,

Raymond Sidney-Smith 32:08

I signed up for academia once upon a time. And now I get these emails that will frequently say, you've been referenced, you've been cited in this particular research article or something like that. And it's very rarely me, it's, you know, that my name gets picked up, because you know, my last name has Smith in it, my last name is hyphenated, it is my full last name. I know, everybody gets confused about that. But I have a hyphenated last name. And so Smith is not my last name. It is it is Sidney-Smith. But frequently, the systems will pick up Smith and so it'll just be like this race Smith, or this, you know, Sidney first name last name, Smith was cited in this, you know, research article, I'm like, That's not me. But okay, but you're absolutely right. I think that something like ResearchGate. And I think actually, you can sign up for Research Gate for free, as a citizen journalist as a, as an independent, individual, for free, it's just a limited account. So you can you can do that, to see everything in the system, you would need access through, say, a library, or an academic account, that kind of thing. That's a really great resource. Generally, I know that most libraries have something associated with that. So just know that you can usually do that. And they do have fairly robust tagging systems in those. I think my library uses Gail, and it has a lot of research databases where you can access those pieces. And frequently, what I will do is I will save the tag, so that I can jump back to the tag itself, because many times the tag is not what I'm thinking I'm looking for, I'm looking for a specific term, but the way in which maybe science or a particular industry associates that data is very different than how I would use the term, right. And so it's just, that's the nature of language, you know, one organization might use one tag and another might use another. So it's helpful to save the various tags in my own system for reference, so that I know the difference when I go to look for it versus not. So what is your favorite tag trick? Like what are some of your favorite specialty use cases for tanking?

Augusto Pinaud 34:13

One of the things is what I call this Come on everybody system. Everybody have them, I don't care who you are, there is stuff in that system that is low priority, who has way longer in your system that it should be? It's not because it's difficult is not necessarily because any of those just well do you have done well, okay, it's low priority, but the thing has on your system way longer than what it should. And there is a low priority tag for those when I started identifying them through my quick review. I tagged them with that. And then once a month, I go into what I call the low priority hour. But what these tags allow me to do is to put them all together and that serve two functions. Number one, it is the perfect brain dead list. Okay, um, there is 3pm. And I cannot think my name to save my life, I can open that if I, there is a moment where my brain cannot even open that, but there is some a level where I can open that list and maybe not one of those two things, what that produce is to keep the system flowing instead of getting all scummy and, you know, moldy

Raymond Sidney-Smith 35:31

or that barnacle like ships, you know, build up this crud. I call it barnacle, productivity. barnacle, Francis.

Art Gelwicks 35:40

Yeah, I'm, I'm a big fan of the idea of multi tagging things. I mean, we talk a lot about doing individual tags so that they're, they're easy to pull out. But I like to have the stacking of the filtering capability, I'll go back to my shopping analogy, I may go through and have a list of things that I need to pick up at a particular store. But then what I'll do is I'll go through and I'll tag the day that I want to pick those up. So that I can do a filter based on a particular day and see everything this was hit that day, I can see everything for that particular location, I can see everything for a particular type of thing. For me, it's all about the different perspectives. And I'm not one who does just singular tags on things, I like to stack the tags, based on the different ways that I'm going to access access that which, for better or worse helps me define which applications I'm going to use because some applications just flat out don't support that particularly well. The other thing I use it a lot for though, is around personal information that I don't accept access very often. For example, books, I have a slew of historical books on my shelf. And I I'm getting old, I don't remember, I don't remember what's in most of them. I don't remember context and things like that. But what I have done is I've gone through and created an index of my books, that includes the title, the basic bibley bibliographic information in it, reference to it in Amazon, but then apply multiple tags, kind of along the zettelkasten idea to be able to say, Okay, give me everything that has to deal with writing the Constitution. And in the various mentions in books and be able to pull that subset back to know where to start, I have the same problem with my woodworking materials. I have tons of magazines, as my wife often reminds me frequently, way too many. And there's no way to keep all that stuff index. But what I do is I create tags around key articles and key items so that I can go through and say, Okay, I want to look up something on wood plains, well, there's no way to find that in all the magazines, but off of the tagging index, I can go through and pull that back relatively quickly. So it helps me be a digital hoarder. It helps me be a physical hoarder. So I'm just an organized one.

Francis Wade 37:55

But one of the big tricks or tips that I give people who I work with is that you're when your tasks tagging, it depends on the volume of tasks that you're trying to tag. And there's a hierarchy that you should follow as you increase the number of tasks because eventually whatever technique you're using, is going to go broke. And you need to migrate to a better technique. And it's kind of a psychological limit to what we can do as humans. And in a webinar I did the other day, I asked the question, after temporal tagging, which is the one that I think right now allows us the greatest task volume, what is going to come next, and got a whole range of interesting ideas, because eventually, everyone who uses temporal tagging will have to go to the next level, once temporal tagging sort of hits its limit. So the idea is that there is no perfect end all and be all in terms of when it comes to tasks. There's no end all and be all be all the way of tagging, you need to be evolving with respect to your task volume, because there are just limits to what we can do with what software can do, to what how much attention we can apply how much energy we have. And they'll always be a next,

Raymond Sidney-Smith 39:12

I have a few tagging techniques that I really always talk about with folks. And they are the use of special characters in tags. And this will lead into my next two kinds of concepts. But the idea here is that some tags you want to be preferred in your system. And so many times if you have a tagging system, the tagging system will very similar to notebooks or folders, they will sort alphabetically or you can sort them alphabetically, and you want to be able to sort the most important ones above so you're, in essence organizing your tags by virtue of naming them something the most common one is putting a period at the beginning of the tag. So those tags are identified as being more important than any other tags. And so there they feel they filter to the top because Most often than not, systems filter based on special characters like periods and dashes, and so on and so forth, then numbers, then alphabet. So you will be able to organize those tags, you can even use numbers because then those numbers will filter to the top first and then downward. And you can structure your your tags that way. So using specialty characters for identifying what kinds of tags. Now this leads to the next point, which is, if your system allows you're capable of nesting tags, meaning having a hierarchy where you create buckets, containers for your tags. And throughout my entire system, I actually will use those nested tags for tagging, kind of multi tagging, as art was talking about. But instead of using both tags, because the tag is a nested, I now have the connection to apply context, apply frame to why nothing is tagged that way. So it's helpful to be able to have the same, say the same types of words in the system, I can now tag that multiple ways. But because of the nesting, it tells me, what's the association. Now, if your system does not allow that, then we could take two things together, combine those two things. So one using a special character to, in essence breaking a singular tag into two parts. So for example, if you had recipes and dinners, you had a recipe library, and you wanted to be able to have a tag for dinner recipes, lunch and dinner recipes, run recipes and desserts. Well, you could have just three tags, instead of nesting them and calling them recipes, dot dinners, recipes, dot brunches, recipes, dot desserts. And now you have the ability to search for two different levels of context instead of just one. And so you can create those those types of things. Now also remember the the way in which your system searches will depend upon how you structure that. So for example, if your system is not capable of searching internally within a tag, you would then have to write recipes dot and then the first few characters of every tag. And that's overhead that you may not want to have to do.

But if your system knows how to search internally within the tag, then you can just type in dinners. And you will find all of the tags that have recipes dot and you'll be able to see that. So you need to just recognize the differences in your in your search facility within your particular tools. And that will determine how you want to do that. Because then you might decide, well, for overhead purposes, I'm just going to use our dot, and all things that are our.or recipes. And you can just make that choice. So we can manifest these levels of hierarchy within our own tags. So that we're capable of not only grouping, but also finding them faster within the frame that we're looking for. So I just always talk about those ideas of combining frames in singular tags, nesting tags, and using special characters to best effect when we're in those situations, I just find it to be very important that once you do start tagging, for me it would be before I started tagging, but as we talked about in the last episode, I think it's appropriate to say in your own personal productivity system, some of you may just be comfortable with starting to organically tag, and then identify patterns, and then start to organize from that point. So I'd say take the next month, two months, and just start tagging things throughout a system and seeing what tags surface and then starting to create some consistency with regard to names and so on and so forth. For me, I started off my system with identifying the tags first, and then applying them afterward only because that's my nature, I just I want that level of structure. So once once you get to that point of determining that you're going to tag tag naming is really important that we went back. Going back to my thoughts earlier about not just using specialty characters for naming your tags for purposes of combining frames, you really do need to determine that you can ever homonyms ad nauseum for words, you need to determine a singular word for many things. So for example, I could put professional, I could put company, I could put organization, all for the concept of work. But I just choose work as the tag in my system, which breaks my second naming convention. So I've created a naming convention, that is all tags are pluralized. And so the idea is, is that when in doubt, I do not want to duplicate the creation of tags in the system. So if I'm typing a tag, and I don't write the correct spelling or otherwise, then it's going to create another tag which of course creates now redundancy in the system and will create drag. So I've just decided that everything is pluralized. So it's not Duck IT'S ducks. It's not goose it's geese. And it's not you know, it's just that's that's the way everything is in my system. And that makes sense to me because I'm tagging something and so therefore I am usually There are likely a quantity of things that I'm looking for I'm looking for a notes that contain ducks. So I'm going to find all of the ducks by using the tag ducks. So that that kind of makes sense. There are certain exceptions to that rule, though. And as long as I know them, like work is one of those where I've decided that, you know, I have a finances tag, but I also have a work tag and work is not pluralized. And that's just okay. I know it's not. And I'm, it's it's ingrained in my world, I know that anything related to my professional life to any of those things are going to be tagged work. And that standard bit. That's how I tagged in my billing system, I know that it's work. And so therefore, I know that it's either work billable or work non billable. And that's really easy to see in my system. And any other things around organizing. Oh, yes. So for me, I try to apply as many tags as is necessary to my system, but obviously, not for the sake of it, right. I don't want too many tags in the system that are unnecessary. But I have taken to using automation to both organize and tag at the same time. So for example, as I've said before, I want everything in every bucket to be tagged the same thing, because then the exceptions allow me to search across my hierarchy to find things. So I have everything that shows up. For example, in Evernote, let's use Evernote as an example. Every time I put something in my health notebook, in Evernote, I have an automation to tag it health. So it now contains the same tag as the notebook. That means when I go into my fitness notebook, and I type in something that is related to health, I'm going to tag that exception as health. And now when I searched the system for help, I'll find everything in the notebook health, but I'll also find those things that are outside of it. So that has reduced the overhead for me, because now I don't need to go around thinking how am I going to find all of the health

notes in my system, I'm doing that as a an exception whenever I need to. But the rule for the health notebook is for to automatically be done. So as much as you can automate those kinds of things. And you can say, whenever this type of note shows up in my system, add the tag x. So use automation, where you're really capable of using it for the best, which is you could say anytime the word professional organization, company or work shows up in a note, tag it with work. And that way now all of the notes associated are capturing those words, and giving you the right context. Because you don't know what kinds of words you're going to use across time. But sometimes you do. And when you do, give yourself that control to be able to apply the right tags, or anything,

A   Augusto Pinaud   47:50

we made a good point in the consistency of it. Because a lot of times I see people who have worked working work, you know, and then health and then fitness, but they all means the same thing. But they wonder why they cannot find the stuff as quick as possible. So it is important to spend some time defining what are those tags? And what they mean? Did you have a differentiation? Or do you make a differentiation between health and fitness? And if you do, then what they mean? What is the reach of them? You know, when you look into those tasks, what they mean? The other thing I tend to tell people when you're talking on your work and your personal part is those tags, in general should be what is the action that you're going to be doing that helps a lot for some people. And lastly, don't make the tax for the intelligent part of you make the part for the non so intelligent part of you. Because the problem I found a lot of times is this tax or make when I'm fresh on a Saturday morning, notice tress Okay, and then I get all these great ideas. But then by Tuesday 11am That I'm tired, then I cannot think on it was duck or ducks or goose or geese what it was. So think on one argue the things you go to when you are tired when you are overwhelmed when you are stressed. And those should be the guides, not the ones when you are on, you know driving under 12 cylinders and can take the highway 180 miles per hour.

A   Art Gelwicks   49:33

For me it's two things. One, make sure you have a way to find your tags once you've created them, the tags that you've created that sit and collect dust, but then you eventually need. How do you locate those tags depending on the application. Sometimes it's centralized within the application. Sometimes you need to build your own index. But neither case you need to be able to have that tag reference. You use the analogy in the previous show about the index at the back of the book you always know to look in the back of the book to Find the index. There's that consistency, well make sure you have that, that consistency within your own environment. Second, I recommend to people don't get hung up on trying to pre define all your tags, define look at your tags based on the information you have at hand. Now, see what tags naturally come out from that, and then build out from there. But don't get yourself hung up on trying to have a perfect set of tags, probably the the sub item to that one is any set of tags provided to you by any methodology, look at with a very critical eye, because I can guarantee it won't be an exact fit,

Raymond Sidney-Smith   50:38

always modified to your needs, it's really important to do that. Absolutely. And I'll go back to

the tag index, because that is the number one thing that I can assure people will help you if your system does not give you a full view of your tags at all times, then you should create a tag index so that you have a legend to know what the tag is for. So this is not just about having a catalogue of all of your tags, because most systems today will show you all of your tags and some view if it doesn't obviously create a tank index. That is that is absolutely primary. But the other part is many times people create tags, and then they recognize that they don't use those tags. So for example, I don't have a calls list in the traditional sense, because I don't have tags that group calls together. But that's just because in my task management system, I use the word call to phone anyone in my system, every task begins with call Susan call bill called John, like, I don't need a tag for that. So I have a smart list that is capable of manifesting that not by tag. But by the words, do I need that in the tag index? No. So we need to recognize that our own work styles, our own workflows, the ways in which we developed our systems really do determine how we create tags, or create the necessity or the absence of that for our systems. So my tag index are the things that I know I must need. And then I annotate what they're for. And this is helpful, because now I can look at it and say, oh, you know what, I have this tag for work. But I actually want a separate tag for professional development. I'm not going to tag those things work, I'm now going to tag them professional development. And that's separate from work for me. Because whatever I'm doing workwise is really for the work of work, not for the development of me to do better work. And so I want those two things separated, you may not. But that's the beauty of of a tag index is that I get to decide what ends up being in it. But it now tells me what I shouldn't shouldn't tag appropriately. And when you are in one of these brain dead states that are that Augusto was talking about, you're now capable of stepping back and saying, you know, what, am I supposed to tag us that way? And you can just jump to your tag index. And it'll say, No, Raymond, you're not go ahead and only tag this for that you're like, Okay, good. And now you can go on with it. So you can apply notes in that tag index to help you identify how you should tag things and how you, you can not tag things as needed. And I think the tag index is often unutilized in a taxonomy. And those are really so useful. And also just as a closing note, to frequently look at that there's a maintenance function to this, you can do this during, say, a weekly planning session, in the GTD world be a weekly review, you can do this in a monthly planning session, a monthly preview session, that kind of thing where you look at your system and decide, are these tags still working for me? Are these all the tags, and have I applied the right information, the right notes to guide me in using these tags, that's the time to really look through the system and make sure that they're working for

Francis Wade 53:59

you. There's no scaling in life without tagging. I think that's the premise of what we're talking about. I think that you cannot you cannot reach to a high volume of monitor high volume of anything with a psychological object physical or digital object without using tagging. And tagging isn't taught as much research as I've done tagging. There's no book on how to tag there's we've accumulated more knowledge in this these two calls than I was able to find in many searches for ideas around tagging. And I think there is an opportunity here for someone to make the case that here are the best practices and tagging that we've been talking about. Here, the best applications here is here's the way you need to think about it even from the very beginning. Here's the benefits. Here's when you shouldn't tag a urine for someone to write that book. and put that together, I think we would all benefit.

Raymond Sidney-Smith 55:02

Fantastic. Thank you, gentlemen. And thank you for this conversation. And so that brings us to the close of our discussion today. But of course, the conversation doesn't have to end here. If you have a question or a comment about what we discussed on this cast, you can visit our episode page on productivitycast.net. There on the podcast website, at the bottom of the page, there's a comment section, you can leave a comment or question and go to town, we do have a community called personal productivity club. And inside that community, you can join it for free. And then you can go ahead in there and find the quote unquote, channel for productivity cast. And we post every episode in there a link to it. And so you can go ahead and comment on that episode post inside a personal productivity club, you can find that by going to www dot personal productivity dot club. And just going ahead and joining it, we'll have a little forum, and I'll go ahead and approve your membership into it. As I said, it's free. But you know, there's just kind of a gateway to make sure that we're not letting in, you know, the riffraff and and then you'll be in and you'll be able to go ahead and join the productivity conversation that we're having inside of ProductivityCast each week. Also, on productivitycast.net. Each episode page is actually containing a couple of really useful items. One are the shownotes. So everything we talked about today, or hopefully everything that we talked about today is noted there with links to anything we discussed. And there are two types of transcripts one is a transcript embedded on the page. So you can just click on the button there, it'll expand the transcript and you can read along while the audio is playing. The other is a PDF version that you can just go ahead and click on and download. And if you wanted to print it or just open it up and mark it up say in your in your you know notetaking app of choice, you can go ahead and download that PDF for access there as well. This is your first time with us. Please feel free to add us to your favorite podcast app, you can just click on subscribe on ProductivityCast dotnet you'll see instructions to follow us and get episodes downloaded for free every time a new one comes out. And so with that I want to express my thanks to Augusto Pinaud Francis Wade and art Gelwicks for joining me here on productivity cast each week you can learn more about them and their work by visiting ProductivityCast dotnet as well. I'm Ray Sidney-Smith on behalf of all of us here at ProductivityCast Here's to your productive life.

V Voiceover Artist 57:21

That's it for this productivity cast, the weekly show about all things productivity with your hosts Ray Sidney-Smith and a Gousto pinout with Francis Wade and art Gelwicks