



TAKE CONTROL OF
**YOUR
PRODUCTIVITY**

by **JEFF PORTEN**
\$14.99

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Read Me First

Welcome to *Take Control of Your Productivity*, version 1.1, published in March 2020 by alt concepts inc. This book was written by Jeff Porten and edited by Joe Kissell. See [About This Book](#).

This book provides you with the tools and information you need to create or improve your system for managing your goals and projects, both professional and personal, with concrete steps and strategies for implementing your tools and workflows, improving your results, and avoiding common pitfalls.

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What's New in Version 1.1

Version 1.1 of this book updates the text to reflect changes in both software and approaches by the author. The most significant changes were:

- Updates to software listings to reflect new features since the 1.0 release; see [Choose Your Tools](#)
- Additional tips and methods developed by the author while practicing what he preaches, for example in [Review Core Concepts](#) and [Get Started with Your Task App](#)
- Rewrites to some text when feedback indicated the initial language was confusing

Introduction

Most educational systems are designed with two objectives. The obvious one, which even young children grasp, is to teach students things they should know. The sneakier one: students are also learning *how* to learn, and methods they'll need for future self-education.

Oddly, little attention is paid to *how to work*. The usual advice is solely “apply yourself” and “work harder”—and that’s parallel with increasing responsibilities and more dire consequences from falling short.

Eventually, “work harder” stops working. If that’s the only tool in your toolbox, no wonder you’re having difficulty. Your body and mind have limits, but demands on you do not. You need better methods.

Everyone has a first time picking up a book like this one, and it’s almost always a response to frustration about their DIY methods. It doesn’t matter what you do—student, career professional, self-employed, retired—if you do things, you can become dissatisfied with how you organize yourself or your results. There are three rough categories that describe that feeling of dissatisfaction:

- You’re exasperated with what you’re doing, or with the outcome of what you’re doing. Either it’s quantitatively lower output than you’d like or it’s qualitatively divergent from your larger goals (which you may have never articulated).
- You can feel external pressures and the metaphorical heat increasing, and you have to proactively increase your skills to match.
- You’re already in crisis, and you know you should do something differently, but you don’t yet know what.

In this book, you’ll learn strategies for all three. The process of improving your productivity and skills is ongoing, but crisis management is somewhat different, with an approach you can use as needed.

I’m an expert because this is the book I desperately needed to read a long while back. I’ve read nearly all the other popular ones over the

years. Most had good ideas (and those that didn't were highly entertaining, in ways the author clearly didn't intend). They fell into two groups: interesting theories that fell short of telling me what to do at 2 P.M. every Tuesday, or books with specifics that worked well so long as I was the same kind of person as the author.

I'm not going to do that to you. I'm highly idiosyncratic, and so are you. You're not going to do *exactly* what I do when you finish this book, which contains very few "point here, click there" instructions. Instead, you'll learn detailed steps for building something similar to the examples I discuss, but with plenty of latitude to fit your own needs. You and I are going to end up with similar houses, but yours will be a different color, with your own furnishings, and maybe a porch.

I spent 20 years discovering how to build my house, and learning the reasons behind what works and what doesn't, before I invented a system that worked well and worked reliably. Your process will be measured in weeks or months, because you'll skip most of the trial and error, and learn from my mistakes. (In some cases I'll tell you what they were, but most of the time I'm omitting horrible and time-consuming advice.)

I'm different in another way: I'm diagnosed with bipolar II and attention deficit disorders. My productivity system acts as an outboard brain, to help me through the times when my own brain is dysfunctional. When I'm depressed or hypomanic, my work capacity radically changes. Meanwhile, my ADD means I am literally unable to pay attention the way most people can.

What this means for you is that it doesn't matter who you are, or what you're dealing with. You're not the exception who can't use these techniques. The more uncomfortable they feel, the more they'll help. If they can work for me, they can work for anyone. You just have to determine how *they* should fit to *you*, instead of the other way around.

Quick Start

This book is designed to be read repeatedly, as you come back to whatever needs a refresher, but I recommend you read it linearly the first time. Skipping parts may confuse you, or cause you to miss important steps. When you read it again—the book recommends when you should!—do so in any order you wish.

Everything you need is in these pages, but there is also additional information that was either useful but secondary to the main points or only applicable to some readers. I've moved that information to the web. At times you'll see this, to let you know what's there:

Web content: These asides point you to specific related posts on the book's blog. There is also an [index post](#) that includes every link to the blog in this book, and informs you of anything that might be added or updated after publication.

Here's what you'll find in this book:

Learn Key Concepts

- [Be Your Own Strategist](#) and [Know the Principles of Successful Planning](#) to learn what a productivity system does for you, and how best to use it. When you [Map Your Natural Style](#), you'll be examining yourself so that what you build is perfectly tailored to your own unique requirements.
- Don't skip [Review Core Concepts](#), or you'll find later chapters to be rather confusing. The book redefines some common words for specificity and creates a few new terms.

Get Up and Running

- You need to [Choose Your Tools](#) based on your own requirements and preferences. You may need some new apps, and maybe a few new gizmos and nontechnical tools as well. You may also change how you use your existing tools.

- Then it's time to [Get Started with Your Task App](#): set up your tools and add your first projects (including one I provide that helps you manage your new system).

Work with and Revise Your System

- When you [Work with Your System](#), you'll follow a step-by-step process to make your tools work for you, and you'll actually do the stuff you're managing.
- There's never a bad time to [Implement Best Practices](#), but this is the point where the steps will make the most sense to you, now that you have some experience working with your system.
- [Track, Review, Adjust](#) is not only crucial to making your system work for you, it's equally valuable for everything that lives in your system. Here's where you make sure your planning and reality are in sync.

Make Your System Work Better for Yourself and Others

- There are people you rely on, and those who rely on you, and you'll incorporate all of them in your planning as you [Manage People \(Gently\)](#).
- It's natural to have times when things get out of whack; when that happens, [Fail Successfully](#).
- You have to [Understand Your Brain, Understand Your Body](#) to be aware of and improve your most important tools.

Take the Broader View

- [Consider Everything](#). Reviewing your system periodically to make sure it's meeting your larger goals isn't only a good idea, it's a required step.
- I recommend that you come back to this book for annual or biannual checkups when things are just peachy, but you might need to return to it sooner if you run into difficulties. I provide instructions for each of these occasions where I ask [Are You Rereading This Book?](#)

Be Your Own Strategist

You have many things to do and think about. Good planning makes that easier. I'll be using the word *system* to describe the places where you do that planning—the apps you use, the other tools you employ, the physical and virtual locations where you store things for later; literally anyplace where you store useful information or physical items.

Note: I use the word “place” loosely, so I'll clarify that a place is sometimes a physical location, and sometimes a virtual space. Your office is a place, and so is the desktop on your computer. It will be clear from context which I mean.

Here's how that all works together:

1. You load your system up with projects, tasks, goals, and information that you want to manage.
2. You work with your apps and other tools to set rules for how everything should be processed—for example, when a task needs to repeat, or when one task has to precede another. You choose your priorities and what's important to you.
3. Based on the rules you've set, your system spits out lists of projects and tasks, telling you *where to go*, *what to do*, and *when to do it*.

Usually, this starts with a master list that may change daily—it's the first thing you reference—while other lists guide you at specific times or places, or when you're in a certain mood. The lists show *only* what you need, when you need it, and get the distracting rest-of-everything out of the way.

4. You regularly review your plan, and map out your choices for the time between now and your next review.

For a preview of how a project looks when it's entered in your system, and how it then can be shown in a filtered list, see **Figure 1**. This screenshot is from an app called OmniFocus (which you might use, but

aren't required to), and includes many concepts that I'll discuss later. The point of this illustration is to show you: structure and organization goes in, simple lists of what to do come out.

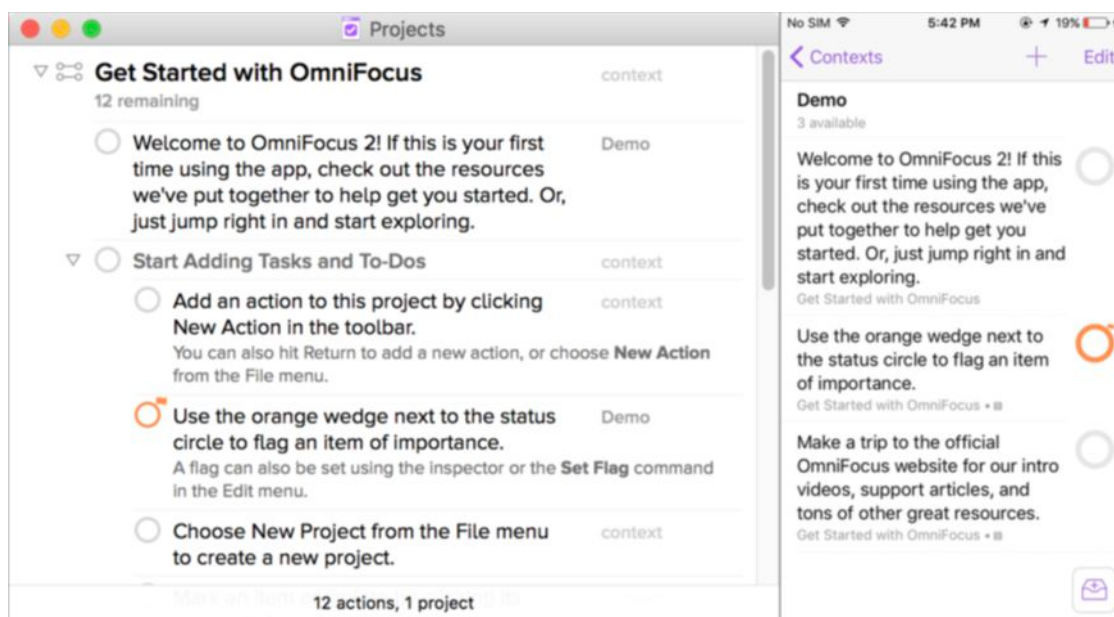


Figure 1: A structured project view on the left (in OmniFocus for Mac), and the resulting list filtered by [Contexts](#) on the right (on an iPhone).

A productivity system requires giving up some of your natural autonomy. If a bright, shiny, and distracting idea happens across your doorstep, you can't drop everything to spend two hours on it—or at least you can't do so simply because it's more interesting than what you've already planned to do. If it shows up as a task with a deadline, or it's *genuinely* more important than your current task, that's a different story. You'll learn better habits of discerning what's important from what's merely new, and the genuinely urgent from the squeakiest wheels.

Note: What do you do with those distracting ideas? You put them away for later. You'll have set times for reviewing all those new things to see what remains useful, and that's when you can schedule them (or save them as a "maybe" for later).

Particular distractions themselves may be unexpected, but the fact that they will arrive is not, so your planning will include time for them. Sometimes you'll have more of them than usual, and only then do you

Know the Principles of Successful Planning

Now that you know how to think about planning in broad strokes, there are a few other things you should know before you get to defining any specifics. I originally called these “rules,” but that’s not the right word—no one gets to set rules but you. Then I thought about “guidelines,” but they’re too important regarding how much time and trouble they’ll save you. “Principles” is the word that’s the perfect temperature for Goldilocks’ porridge.

These are:

- Recognize that your planning is a series of promises you’re making to yourself about what you’re going to do.
- Map out your projects and tasks to a sufficient level of detail so that when the time comes, you’re not thinking about *how* to do it, but rather are doing it.
- Design your system with a humane understanding of the constraints on your time and emotional energy, so that your work doesn’t deplete you.
- If your goal is to be more productive, define *for yourself* what that means.

Make Better Promises to Yourself

When you sit down and brainstorm a list of things to do, what are you *actually* doing? Writing them down doesn’t get them done, doesn’t put appointments on your calendar, and doesn’t do any of the several steps required to go from a good idea (or a required outcome) to an accomplished task. What you’re doing when you put something on a list is

making *a promise to yourself*—usually to do a task, sometimes to consider it in the future. These lists are *personal* unless you explicitly choose to share them; no one but you sees them. Only when you tell other people what's there, or when they ask you to add their requests and you agree, is it a public commitment.

Note: The privacy of your lists is crucial, and should be maintained. Your plans will contain goals, tasks, and information that are embarrassing or even harmful if others know about them. Share only what needs to be shared, and only with the people who need to know.

To boil it down, your new system will guide you to make three changes:

- Make better promises to yourself about what you can and will do, and be more reliable about what you promise others.
- Adopt self-improvement approaches that help you form better habits and respect the existing habits you want to keep.
- Ensure “what you do” fits “who you are” and “where you’re going.”

You choose your own destinations and paths, but these underlying adjustments make the voyage easier and more satisfying.

Reduce Mistakes by Deciding in Advance

The ad hoc approach to productivity, which everyone without a deliberate system uses, requires constantly making decisions in the moment about what to do next. Maybe you’ve written down some tasks on a daily list, but once you’re under fire, you’re busily figuring out how to move things around and what things you might have missed. Likewise, without planning, you may get to a task only to realize that first you have to figure out how to do it, or that it can’t be done right now.

Obviously, that’s chaotic, but there are other reasons why it’s a bad approach:

- Constantly choosing may feel like freedom to do anything, but it leads to wasted and inefficient use of your time. You spend a while

Map Your Natural Style

You're coming to this book with established productivity methods—at the very least, the ad hoc system you've developed from your work habits. In many cases, these came with their own presumptions about what productivity means: how you implement it, how you measure it, and how you judge yourself in relation to it. I'm going to refer to all that as your natural style.

“Natural” in this case isn't something you were born with, or even a necessarily positive attribute. What comes naturally to you is a function of what you find comfortable, which for many people means “the methods I learned in high school.” The results of what's natural to you led you to interest in improving your productivity, so clearly those methods fall short in some ways. Comfort is an important attribute, though; you shouldn't always sacrifice it in favor of improved productivity, but instead should balance the quality of life that comfort provides you with the productivity you gain from temporary discomfort.

Considering your current approach is the first step toward adopting a new system. You'll use this information to make better decisions (starting when you [Choose Your Tools](#)).

Document Your Thought Process

In this chapter and a few to follow, your instructions are to think through some big picture ideas, and come to conclusions about them for yourself. Almost always, that means you should *write down* those thoughts and conclusions. That's a step many of you will be tempted to skip—I frequently did at first, when other books told me to—but there are very good reasons not to skip it:

- ✦ Some of these decisions require you to be a kind of honest with yourself that's intensely difficult, bringing up things you normally wouldn't share with anyone but your dog (and maybe not with a particularly intelligent dog). When you write them down, you're sharing them with *yourself* in a concrete way, more so than if you keep it in your head.
- ✦ The choices you make now will drive more decisions in later chapters. Some implementation choices can accidentally commit you to the wrong overarching goals. Writing down your decisions helps to avoid this.
- ✦ You'll revisit these big questions in the future, to make sure that your system is serving any new needs. What you write now is a snapshot that, in the future, will help you determine specifically what has changed.

Elements of (Natural) Style

With apologies to Strunk and White for the heading above, here are the topographical features of the map of your natural style. Note when they already apply to how you think of your actions and destinations.

Roles, Goals, and Journeys

Nearly everything we do has an unstated *why* behind doing it; it could be anything from “this task will make me money” to “completing this project is part of my purpose in life.” At the same time, some things you do aren't projects that you can finish, but instead stem from long-term and lifetime responsibilities. Clarifying both of these helps you state your plans in terms that reflect their true importance to you.

Review Core Concepts

Here I present new ways of thinking about concepts you probably think you understand already. I also discuss new definitions of terms including *tool*, *project*, and *due date*.

I know, right? What a waste of time! But it's not—these redefinitions will save you a great deal of effort. It's similar to when you learned in elementary school about gravity: drop an apple, it falls, and the dude under the tree claims he discovered something new. Then you get to college and maybe find out that, thanks to Einstein and relativity, gravity is actually a bend in space, and no one knows precisely how it works, or why it's weak enough that you can pick up an apple when the entire planet is trying to stop you. The simple explanation was a mask that hid the fact you didn't understand it.

The core concepts in this chapter are interdependent, but I have to present them in linear order—books are just like that. To make this clearer, here is what's in this chapter:

- The *tools* you use to organize your projects, collect ideas and notes for later, and track your progress.
- The *components* that those tools use and organize. I just used the word “project,” but what is a project? What's a task? What's the difference between an appointment with your boss and a vague plan to call your mother on Sunday? Don't skip this material, because I introduce some new ways of thinking about things you've been doing for years. See [The Components of Productivity Tools](#), later.
- The *process* that takes these tools and components, and with you as the engine, turns capabilities and data into completed projects and advancement towards your goals.

The entire rest of this book is a continued discussion of that process, in greater and specific detail. But here, in [The Process of Using Your Tools](#), I present the broad conceptual strokes that help you understand how those details will fit together later.

The Tools You Use

Ask most people who use a productivity app what their system is, and they'll tell you the name of that app. And yes, that app is very important—it's the biggest moving part in your system, aside from you—but it omits everything else. An app doesn't make you magically productive when you launch it, or even once you fully understand its approach. The app works when it *integrates* with you, how you think about what you do, all the places where you put information, and everything you use to do your tasks.

An app is just a tool, and a tool is *anything* you use to store, manage, organize, and do what you do. If you find your kid's broken toy in the back seat of the car, and toss it into the cupholder as a reminder to buy a new one later, the cupholder is now one of your tools (specifically, a mnemonic device). But it's not a very good one, because it alerts you to buy the toy only when you get into your car and see it—when you're about to go somewhere that probably doesn't sell toys. Not a useful reminder. It *becomes* useful when *another* tool prompts you to check your car for reminders like that toy when you're *not* doing something else—that's when you can decide to drive to the store, buy it online, or write it down for later.

A well-organized system includes these types of tools:

- **Your task management app:** This is the app that other people mistake for their entire system. It's first among equals amongst all the tools you use—not only does it organize most of your work, it's also the first place you look when you're starting your day or picking up after a break. I'm going to call this your *task app* for the rest of this book.

Think of this app as your command-and-control center. You might do some of your organizing in other places (for reasons I'll discuss shortly), but when you do, this app has a special kind of reminder that tells you when to refer back to it. When you look here, you're confident that you're seeing *everything* you're doing or might do, even if some of the complexity of those tasks lives elsewhere.

Choose Your Tools

Most likely, you're not only changing your organizational system, you're also choosing new tools to use with it. These likely will be new apps, but new hardware and non-technological items may also be part of the package.

This is not a difficult process, but it does require planning and forethought.

Audit Your Existing Technology

While it's nice to have an excuse to buy a brand-new iMac Pro, iPhone, and Apple Watch, most of us go to productivity war with the hardware we have. Some apps you're currently using will be eventually abandoned after you [Run Both Systems Side by Side \(Temporarily\)](#). ("Both" means what you're doing now and the new system, while you transition to it.) But you may be stuck with some apps as your work and social obligations require them.

When you choose your additional tools, you'll want them to integrate as much as possible with the things you're already using. For example: you'll want your task app to run on your computer or tablet (or both), and you'll want its data to automatically appear on your mobile devices. When it's a good time to buy hardware (now or later), you'll want it to integrate with your new system, as well as any old equipment you may still use (such as if you relegate your old laptop to being a living room knockaround).

When you're reviewing your existing technology, it's a good time to take notes on past annoying issues (or showstoppers) that led you to want to improve your system. For example, "I have the best ideas in the shower and while driving, and I always forget them." Or, "I'm good at organizing the information I'll need next week, but I can never find anything I put away that I need months later." These can provide

important information about what to prioritize when choosing better tools.

These are the categories to consider when you're doing this review:

- **Task app and other apps:** You're going to be moving information between apps frequently. For example, everyone gets new tasks in their email inbox on a daily (or minute-by-minute) basis. Just responding to a particular lengthy email can be a task you have to manage. Sometimes you manage it within your email app; other times it's best to use an integration to get it out of there and into your task app.

There are three ways to move your tasks into your task app:

- ▶ *Tight integration:* Ideally, but rarely, there's a method of linking data between apps so that the original is maintained in context. This method is usually best, when you can have it. For example, the Daylite relationship-management app lets you link messages in Apple Mail directly to tasks in Daylite.
 - ▶ *Forwarding or copying:* Nearly always, your apps will facilitate bouncing data out of one application and into another. For example, OmniFocus provides a cloud service that attaches email you forward to it directly to your OmniFocus database. The problem is that you'll lose the data's original context—for example, emails you forward leave their threads behind, and you'll have to manually search in your email app if you want to pull up the original conversation.
 - ▶ *Pointers:* When a project is perfectly well organized somewhere else, set a pointer in your task app sending you back to it. If that planning later needs automated features your task app provides, you can put it in your task app then.
- **Cloud:** Usually you'll use cloud services to move task support materials from one device to another, so it's not an integration so much as a method. But some apps write information directly to the cloud, which can be useful. Bonus points to apps that use the same

Get Started with Your Task App

All along, you've been laying important groundwork for making use of your tools. So in truth, you “got started” several chapters ago, since without that preparation you'd run into much bigger difficulties when it came time to start launching apps. But you usually only have to do that once—while *this* “get started” is something you may come back to when you [Fail Successfully](#) or [Consider Everything](#).

The things you do when transitioning to a new system are similar to what you'll be doing as ongoing processes after you're using the new one. The differences, and they're big ones:

- When you start, you have a *lot* of things to move in, and this takes time. Once you are migrated, working in your new system should take less time than it does now. It will likely be faster than your old system too, but if not, you'll get more bang for your buck out of it.
- You might be learning new software. It takes time to turn all those menu commands and buttons into muscle memory.
- On top of that, you'll *also* be using your old system for a while longer, because your life can't go on indefinite hold just because you're getting organized.

No two ways around it: this takes more time than just sticking with your old system. But once you're done and using your new system, you're going to feel more on top of things than you do now, and when you work on something, you'll *know* that's the right thing to be doing then. Psychological studies show that people who are focused on their work in this way are *happier*. It may take longer for you to improve your productivity (as you define it), but this benefit should be a nearly immediate reward.

Document Your Old System

I've already made frequent mention of your "old" system: what you're currently using that you want to improve upon. This probably caused great mirth among those readers whose "system" consists of an email inbox with 8,000 messages, hastily scribbled lists of things to do, and 30 pounds of paper they carry around in their shoulder bags.

Whatever it is, you already have a bunch of places where you jot down organizational ideas, store reference materials, and make notes about what you might want to do in five years. If you're rather disorganized now, you might have *many* places where you do this. You should figure out what they all are, virtual or otherwise. Don't forget the stack of papers and mail on your desk (or dining room table, if you eat in the kitchen), the voicemail and voice memos you might have recorded, any documents in the cloud that aren't on your devices, information and tasks stored in Slack or similar work chat environments, or the widgets and receipts you've jammed in your glove compartment.

Finally, include your calendar. It's not uncommon to stick with the same calendar you're already using; that makes the next steps easier, but it's not required.

Don't *do* anything with those places yet. It's enough to have a list of them. Spoiler alert: you'll be working with this shortly.

You'll be replacing a fair number of these places with your new system, but perhaps not all of them. The glove compartment is a nifty place to quickly stash things you can't deal with until you get home. That's why you'll use pointers in your new system to check it periodically for anything there that needs attention.

Get Used to Your Tools

You're almost certainly using new software, and maybe a new gadget or two, as you're getting started. Some folks take to these things as if

Work with Your System

Now that you’ve got either a working new system or one you’re migrating into, it’s time to review the steps you take in order to make it useful. Some of it will be familiar from when you set it up, others are new, but none of them should be particularly surprising.

Store Ideas in Collection Points

The point of having enough collection points is to be able to get things out of your head quickly. Stray thoughts, reminders, and communications happen every waking hour, and most of that time, you’re already focused on something else. Many of us are in the habit of taking “just a few minutes” to deal with those immediately.

That’s almost always a bad idea. Anything that suddenly pops on your radar hasn’t been thought through, so you’re not in a position to know if it’s truly a three-minute task. (Many of these have hidden prerequisites, which sends you into time-consuming “yak shaving” territory; see [Manage Your “Yak Shaving”](#).) What you’re *currently* doing, you’ve already decided to do now. And remember: switch tasks, and it will be 20 minutes before you’re in the groove. My guess is it’s even longer if you’re trying to keep both things in your head at once.

Instead, get these interruptions (whether they’re in your office or in your brain) out of the way as soon as possible. You have to make time for time-sensitive interruptions, such as someone dropping by your desk, or a phone call when you’re not able to let everything go to voicemail. Some email and text messages also qualify. Go ahead and do those—you have no choice. But the tasks they generate may not be as urgent.

Everything else, you stash for later, and you do that by putting it into one of your collection points. Here’s a task I created three minutes ago (**Figure 15**).

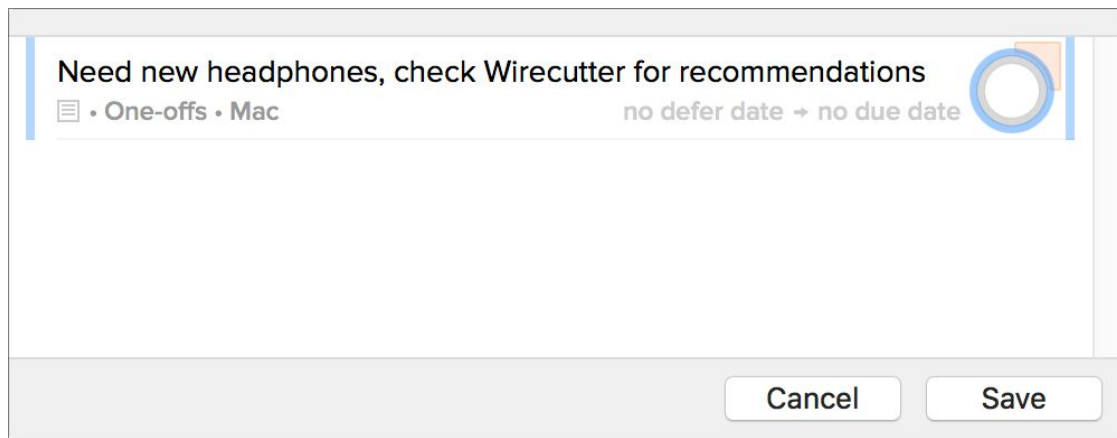


Figure 15: The quick capture feature of OmniFocus.

My trigger was when I started playing my “writing music,” and the headset that worked perfectly fine 20 minutes ago started playing mono in my right ear. This could have been entirely distracting; headphones are on sale next door to where I’m writing this. Instead, I fired it into my task app. By setting it to the “One-Offs” project, it skips the OmniFocus inbox and lands where I need it to; no further action necessary.

Ideally, some of your collection points will allow you to set some details about your tasks when you record them (as I did in the screenshot, by setting its project and context). But that’s rarely possible; most of your collection points won’t handle that organizational data. When you have several options, use the best one; on my Mac, it’s 15 seconds to store a task with the OmniFocus quick capture window, but only 60 seconds to switch to OmniFocus and do it right when I need to add more details.

Note: The most important data to set when you store something is its due date. A due task waiting in a collection point still shows up on your Due list—but *only if* you store it in your task app, or point yourself to look at due tasks in other places frequently.

Implement Best Practices

Everything preceding has been recommendations for things you *should* do to set up your system. This chapter is a collection of things you *can* do to make it work better for you. It's neither exhaustive nor mandatory, but chances are, you'll find ideas here that will save you quite a bit of trouble.

Some of these practices are a *feedback loop*, also known as virtuous or vicious cycles. We're shooting for the virtuous ones. They're when something positive is crystallized into a method of informing the future ways you do it, and something negative is noted to be avoided. The more often you go to the gym, the more you'll enjoy going to the gym. (Or so I hear.) At first, nearly everything you plan during a review period is no better than an informed guess about what performing a task will be like; a feedback loop captures information by drawing your attention to your habits and outcomes, and (mostly) painlessly improves doing it the next time.

Web content: There's an [additional list of technology tips and tricks](#) on the book's blog that are either specific to particular work styles or platforms, or that needed more space to describe than we have here.

Planning Techniques

These are approaches that you use when you plan out a review period. They don't specifically affect your planning style. Instead, they're methods of making sure you stick to your plans, by making your work more pleasant and manageable.

Use Sprints

Many tasks that aren't particularly onerous come with a great deal of friction because they're so darned long. It's one thing to have a recurring task to wipe down and mop the kitchen; quite another to spend an

entire weekend cleaning up the house and throwing out 1,000 things in the basement and garage.

A sprint is any task that you tackle for a set period of time, regardless of whether it's anywhere near done at the end of it. Use them when any of these happen:

- You find yourself neglecting or procrastinating a task because it's such a huge chunk of your day (or your week).
- You have a task that you don't mind doing, but it's large enough to eat time that you need for other things. You don't want to get involved with it, then look up when the sun is setting. A long time block makes it tempting to keep on going; a sprint gets you in and out quickly.
- Finally, use a sprint when you want to limit yourself on pleasant things, by noting how long you're allowed to do something you enjoy before you move on to something else. My A.M. reminder to check news and Facebook comes with a 30-minute limit, and from experience ignoring it, I've added a timer.

Note: Self-limiting sprints are *required* to corral dysfunctional behavior that impedes what you've agreed to do. A mid-day Facebook break can help keep you going; if it extends from lunch until 3 P.M., you *must* use a limiting sprint.

Set a sprint up as a recurring task, and delete it when it's completed. Make it repeat often enough so that the task doesn't get bigger in your absence. For example, I said earlier that my daily email regimen is "new messages + 24 hours of backlog." You could also say, "spend 30–60 minutes on email," but only if that is enough time that the mailbox doesn't get larger than when you started by the next time you get to it.

The recurrence and the amount of time you dedicate to the sprint is the feedback loop. Adjust both until you're making sufficient headway, or to maximize your willingness, and perhaps enjoyment, when you get to the task.

Track, Review, Adjust

There are two common metaphors for where you are while you work, both oddly botanical: “in the weeds” dealing with your tasks, but maybe “missing the forest for the trees.” Your regular review is your chance to check in with your prior decisions, change them as appropriate, and make your system into an accurate map of the territory.

The review is when you read through your lists in their planned structure. During the review period, you may have worked with collated lists of their individual tasks, without seeing the overall structure much. This is your time to approach it from the top down. Most of your review time will be in your task app, but there are a few things you’ll do elsewhere.

Projects

These are the steps to take while reviewing your project structure. Your task app may have a way of reviewing your projects sequentially, so the fastest method is to view a project and apply any relevant instructions below—only a few will be needed per project. This will come naturally to you with experience—in the meantime, while you’re still referencing this list, you may want to make one pass for each chunk of review instructions you can hold in your head at once:

- **Project status:** Perhaps not updated during the week, so bring it up to date if there’s anything you forgot to note.
 - ▶ Mark completed projects as done. With most software, this automatically marks all tasks it contains done as well, so don’t do this if there are lingering followups, or at least, not without moving those elsewhere.
 - ▶ Cancel any projects that have been dropped. In most software, this leaves the project in your database for reference, but makes all its tasks inactive.

- ▶ Set a later start date for any projects now on hold. This also should cascade to all its tasks. If a hold is indefinite, some software has an “On Hold” status; otherwise, I set the start date to January 1, 2030, on the theory that none of my real projects will ever be deferred to that date. Therefore, it has special meaning for me. You can use your kid’s 60th birthday.
- ▶ Review projects that were previously on hold, or had a deferred start, to make sure none of them have become active.
- **Documentation:** If you’re using your task app to keep narratives or other notes about your projects, make sure they’re complete with recent tasks and information.
- **Waiting Fors:** These get special attention because they’re easy to forget to record as they crop up. Add them for any task you can’t do yet. Usually, you do this by creating a Waiting For task as a subtask for what’s blocked; the parent task does not become available until the Waiting For is marked done. If the task already appears in a sequential list, you can alternatively put it in right before the blocked task. Reminder: set the due date for when you want to be reminded the Waiting For exists, not when the parent task is due.
- **Parallel and sequential adjustments:** When a sequential project is accidentally set to parallel, you’ll see unavailable tasks on your lists prematurely. When a parallel project is set to sequential, tasks that are available are erroneously removed until you do the first one. Setting the wrong one is easy in most task apps—and can be quickly fixed with a checkbox or menu item—so make these adjustments if you didn’t see what you were expecting on your lists.
- **Reverse calendar adjustments:** If any projects have had their overall due dates changed, check to see if their tasks need a new set of due dates to keep it on track. Do this for projects that are due either sooner *or* later; when the overall deadline is delayed, if you don’t also modify its reverse calendar, those old due dates are actually ahead of where they need to be. That might crowd out legitimately due tasks, or rob time from flagged Whenever tasks.

Manage People (Gently)

You may be embarking on a new organizational journey, but you probably don't live in a hermitage on a mountaintop. You have to interact with other people, and rely on them to get your tasks completed. I can't make blanket suggestions for how to deal with them—everyone's different—but there are methods for keeping it all straight for yourself.

Make Liberal Use of Waiting Fors

Any time you're waiting for something to happen that's not under your control, that's a Waiting For. Up until now, you may not have used them much, because it's not that onerous to glance at a task and decide in the moment that it's not on deck.

When you're waiting for other people, though, Waiting Fors are crucial. *Anything* you delegate, for which you still have final responsibility, needs to be tracked. Likewise, you don't want to switch to a task, spend time getting ready to do it, then immediately discover that you can't. A Waiting For tells you immediately that the task can't be done. If there's no immediate action you can take to speed it along, you don't consider it in the first place.

Some tips for how to implement Waiting Fors when it's someone else's job to get it back to you:

- **Reminder:** create a Waiting For by giving the task that's waiting a subtask: "WF John to email me." Add a due date when you need to be reminded you're waiting, and an optional note telling you when the task it's blocking is due. The subtask blocks the parent, so instead of seeing it on your list as something to do, you see it as a reminder you're waiting. You can't check it off until you're not waiting anymore.

Note: When you look at your project, you'll see the Waiting For in the context of what's waiting for it. When you're working from context lists, you don't see it at all. That's why you check your Waiting For context list occasionally.

- If you're organizing something in one of your other apps, you may need a Waiting For but have no way of creating one. Edit the task with a prefix, like "WF John to email me—Prepare the report for Friday." Next time you review, put this into your task app where you can track it better.
- In a busy project with many interactions, you could have quite a lot of tasks that are Waiting For something. Add one *every time*. Your project likely has multiple moving parts, and things that you're doing in parallel. The Waiting Fors are a heads-up display telling you exactly where you can move forward, and where you can't.
- You can also use Waiting Fors to track what you're doing in the moment. You need a one-line reply from John *right now* because you don't want to switch projects, but there are other related tasks you can do in the meantime. You don't want to forget you need that very soon, though.

Set a Waiting For with a due date in 15 minutes, or 2 hours, or whatever short period of time is appropriate, then move on to the other task. (A labeled timer can also work. But a Waiting For is easier if you have to do this several times simultaneously for different people.) You can completely forget you're waiting, because you'll be alerted in short order. You're still on the same topic, so you maintain flow. You're also not distracted by the blockage elsewhere.

- When useful, group your Waiting Fors with contexts by people. Instead of using your usual Waiting For context, you could use "Waiting for: John." In some task apps, this is a nested context with "John" outlined below "Waiting For;" in others, you can apply one tag for "Waiting For" and another for "John." When you don't have either, it's a separate context. This allows you to make tasks that waiting for something unavailable and out of your way, and also to

Fail Successfully

If there's one thing that's frustrated me from reading dozens of productivity books over the last two decades, it's that no one told me how to fail.

Failure is common when you start a new system. What I've written is the first time I've seen a framework for transitioning from old to new, and the reason it's here is because it's a common time to fail. But it can also happen anytime afterward. Maybe your system has become much less efficient. Or something specific derailed you, and you've stopped reviewing it, referring to it, and updating it. I've read platitudes for how to deal with that, but never techniques.

The corollary is that nearly every productivity author has presented himself as the Platonic ideal of hitting deadlines and mastering New Year's resolutions. I don't know about you, but the message I took away from such writing was, "Well, it worked for him, but I guess I'm just not good enough, or somehow negatively exceptional."

I'm not going to do that to you. The advice I've given here, more often than not, regards techniques I've learned precisely from repeated failures, and often switching my system wholesale. Meanwhile, writing this book was its own derailing event for me. It's a huge task, parts of it took longer than expected for reasons beyond my control (although they were mostly my fault), and as a result I regularly blew off my system far more than is my usual.

Note: That said, writing this book has also *improved* my system and my habits, because it made me focus where I wasn't taking my own advice. You may never write a book, but if you can find your own methods to give it this kind of attention, I recommend it.

It's almost inevitable. At some point, you're going to go off the rails. Accept it now, and you won't castigate yourself for it later. Come here and let this chapter point you back to smooth running. (Give it a read now, too. Can't hurt to be prepared.)

Recognize Your Major Triggers

Earlier, we discussed why you should [Have Triggers](#) that draw your attention to specific problems. The ones I'm discussing here are big kahuna triggers; minor triggers tell you when to make tweaks and alter small habits, but these major ones tell you something larger has gone wrong, and you're not going to fix it with tinkering around the edges. Some possibilities:

- A huge project landed on your desk, and it's made a pile of behaviors that used to work great for you less than ideal.
- You realize that you're working off a legal pad, and you haven't launched your task app for two weeks.
- Someone important to you calls you on the carpet and tells you how they perceive you're screwing up.
- Your Past Due list looks like **Figure 19** (in which the red 87 represents your Past Due list) and you're pretty sure everything you didn't get to was a hard deadline.

The figure shows a calendar layout with a header row for days of the week (Sun to Sat) and a row for the current month (June). The 'Past' column is highlighted in pink and contains the number 87. The 'Today' column is highlighted in yellow and contains the number 1. The 'Tue' column is highlighted in yellow and contains the number 3. The 'Wed' column contains the number 2. The 'Fri' column contains the number 1. The 'Sat' column contains the number 1. The 'Sun' column contains the number 1. The 'Mon' column contains the number 5. The 'Tue' column contains the number 1. The 'Wed' column contains the number 1. The 'Thu' column contains the number 3. The 'Fri' column contains the number 3. The 'Sat' column contains the number 2.

87	Past					
Sun	Mon	Tue	Wed	Thu	Fri	Sat
Today	21	22	23	24	25	26
1	1	3	2		1	1
27	28	29	30	31	Jun	2
1	5	1	1		3	

Figure 19: The OmniFocus Forecast view counts upcoming due tasks and everything past due in a calendar layout, a convenient feature when you don't see terrifying Past Due lists like this one.

It's up to you to decide what's a minor trigger that indicates the need for a new practice or habit, and what's a major one that tells you to take a more holistic approach. I find the easiest one is, "are you miserable?" The more emotional impact this is having, the less rational

Understand Your Brain, Understand Your Body

Most people who know me would call me the worst possible apostle for effective health management. Suffice it to say that I am not a member of the “my body is a temple” community. I am, however, a strong proponent of using the best tool for any given task—and to state it reductively, your body is the first tool that all other tools rely upon.

This gets into surprisingly difficult issues. I can think of many things that may be good for productivity while being “bad for you:” an afternoon energy shot, a cinnamon bun that lifts your mood, a cigarette, a metric truckload of caffeine. It’s not an either-or situation; some of these might work well for you and *also* not be the best idea.

Note: It’s not only that it’s bad for you, it’s also putting up with everyone around you somehow thinking you need to be *told* it is. Endlessly. This is an area where everyone feels free to judge and no one believes you rationally arrived at your choice.

As you read this chapter—meant to be an Owner’s Manual for Your Body as a productivity tool—you should make explicit choices, and figure out your own balance. A fair amount of advice here is to take better care of yourself. But some isn’t, and this book isn’t titled *Take Control of Leaving An Attractive Corpse*.

Experiment on Yourself

Your body belongs to you, and you should treat yourself like a scientific experiment. Change the inputs, and you’ll change the output; some inputs that seem extremely minor can affect you in profound ways.

Note: For example, a true and unbelievable fact: normal air at sea level [is a mild narcotic](#). At higher altitudes, everyone is slightly smarter. Not that this means you have to move to Denver, mind you.

There are several inputs that are obvious to everyone: sleep, diet, and exercise are the ones we talk about most. There are many others we don't notice, possibly because they're mostly beyond our control: air quality, how much sun we get, ambient temperature, or whether the times we eat are actually in accordance with how our blood sugar levels are varying. When you *feel* hungry enough to notice, you've actually *been* hungry for a while, and during that time you've made different decisions.

Note: A [study of parole decisions](#) discovered that almost no paroles were granted immediately before lunch, but the rate rebounded after. Consider this the next time you're making big decisions at 11:30 A.M.

So what you do is vary *one* thing at a time, and track whether it makes a difference for you. Things to track: your mood, and your work quality and output, as in **Figure 20**. These things are *not* the same, and neither one is more important than the other until you say it is.

	Sleep (hours)	Output	Mood
4/15	4	5	5
4/16	7	4	6
4/17	11	2	3
4/18	6.5	4	4
4/19	8.5	5	6
4/20	7.5	6	5
4/21	9	5	5

Figure 20: A slightly fictionalized measurement of a week in my life.

Note: I'm using a [Likert Scale](#) from 1 to 7 for mood and output, because that's what I was taught to use in grad school. It provides better data than 1 to 5. I'm also roughly assigning values with a [bell curve](#), so 1 or 7 means truly awful or phenomenal.

Consider Everything

After a while, it's a good idea to take a step back and consider... well, like the heading says, everything. In fact, you want to do this repeatedly.

You have a few choices about what conceptual altitude to take when you do this. If you just got out of college, it could be a big deal to plan out a year in advance. If you're feeling a vague sense of dissatisfaction with life in general, you might want to map in broad strokes from tomorrow until your eulogy.

It seems to me that most people should visit both extremes, and a few touchstones in the middle, from time to time. Speaking for myself, thinking about what I want to do with the entire rest of my life scares the willies out of me—which is fairly good evidence that I haven't thought about it enough. Do what's comfortable at first, but push gently against your boundaries from time to time.

Note: This is also the time to revisit some assumptions, especially old ones you've never articulated. Are you living up to *your* goals, or someone else's? If they're yours, how long has it been since you chose them?

The following time periods are guidelines, not rules. Adjust them based on how quickly you acclimate, how well your system is working, and how rapidly your bigger picture changes. As you read this chapter, set up tasks that point you back here, to each section as their time period occurs.

The First Month

There is one instruction on what *not* to do, and that's make any large decisions about your new system.

Consider a New Year's resolution to "get healthy." That's huge. It includes better management of your health care, eating better, exercising more, cutting out bad habits, and basically modifying every waking hour of every day. You don't do that all at once. By February, if you've broken the habit of having a hot fudge sundae for breakfast, you're ahead of the game.

Same thing here. Your resolution is to "get organized," or "reach my goals," or "be less stressed." Your system, your task app, your circumstances, and *you* are all large moving parts. All you've had time to do so far is identify and fix a few small habits.

The problem right now is category error. Almost no one faces the problem of "I didn't get healthy" and decides, "Okay, I'm just never going to get healthy." But right now is when plenty of people either spend another three months picking out software, or decide that they're genetically unable to be organized. Both are bad ideas. Don't abandon your system now because it "doesn't work."

Right now, you're spending the maximum amount of time you'll ever need to manage your system. You're paying attention to things that will become automatic. You're thinking harder about everything. And the biggest benefit that's supposed to come out of it—getting more done, giving yourself permission to be human, and making realistic assessments about how balance those together—you're not used to doing those things yet.

Stick to small changes. You have permission to go bigger in only one case: when your prior choices are *actively* and *obviously* detrimental in ways that I haven't said will automatically get better. If that's happening this early, go back to the beginning and start over with better information.

If you don't need that kind of wholesale revision, don't revise at all. Tweak.

Are You Rereading This Book?

There are three categories of people reading these words. Each of you get different instructions.

New, and You Read the Entire Book

That's a good habit. Only a few more pages to go. You're in much better position to make the right choices now, because you know what's ahead, and you have more information about what to avoid. Keep reading about what you'll be doing in a year or two, and if that informs the decisions you make now about how much you document with future-you as your audience, all to the better. Good luck!

You're Confused About Something

When you're learning new skills, it takes a while to fully *grok* them. That word comes from *A Stranger in a Strange Land* by Robert Heinlein. It means to *truly* understand not only everything about something, but also the reasons why it is the way it is, and its purpose in existing. Spouses and old friends, if they're *very* attentive, *very* diligent, and a little lucky, grok each other. I love this word.

Cracking the book again is an instinctive move, and it's a good one. Reread anything that's not clear, but you don't need to go over *everything* again. See the previous chapter regarding how long it's been since you got started; if it's early days, it's counter-productive.

But for some of you, it just doesn't work, even after multiple sittings. I'm expert, not omniscient. Here's what to do next.

Read Books and Hit Websites

There are dozens of other approaches that are somewhat or wildly different from what I've presented here. Find a few more. Where my specific steps haven't worked for you, the overall structure and approach still will. Most of the books I've ever read about productivity had fantastic conceptual ideas, but very little worthwhile about how to implement them. Hopefully, your time here has been good training for coming up with your own tactics for a new strategy.

Web content: I've included a [bibliography](#) of the best books I've read, with capsule summaries to let you know how applicable they are for you personally. I am extremely fond of the [Bookworm podcast](#), which reviews a new productivity book every two weeks.

If you're not entirely sure whether productivity is the real problem, but is masking something else, skip the productivity books and look for some about what to do with your life from a broader perspective. There are options for everyone, from college kids to retired people, the deeply religious to the atheist, the folks who focus on small communities and those who take a global view. Figure out what fits, and then come back to making a productivity system.

If the above steps are too much (or too time-consuming), Google is your friend. There are plenty of essay-length articles, even whole websites and magazines, dedicated to publishing articles about productivity. It's an easier buffet of options, more of a tapas menu than five entire meals. (I personally like [Lifehacker](#), but it's also full of fluff; I just lost 15 minutes reading about a [cheesesteak casserole](#) I might have to make someday.)

There's one more category of information to consider: productivity forums. You'll find these on websites, Slack channels, email lists, and probably a local Meetup every month or so. Everyone there has their own experiences and insights, and can prevent you from repeating their mistakes. You'll meet many people who are certain that their methods are the One True Way. Get suggestions, not rules.

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Jeff Porten is a Mac and internet consultant, part-time journalist, and sometime writer of books in Philadelphia. He is previously the author of *The Twentysomething Guide to Creative Self-Employment*, a title that amuses him greatly now. He is probably at a Starbucks with his MacBook Pro and a gallon of coffee, doing his best to practice what he's preached.

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Shameless Plug

Have Mac, internet, or networking issues you can't solve? Need better tools, especially your technological ones? Want all that wrapped up with productivity expertise and big-picture awareness of *why* you do what you do? I'm available, and willing to travel. One-on-one training and implementation, group seminars, office workflows, conference presentations and speeches: tell me what you need, and we'll figure out if there's a good fit. Reach me at takecontrol@jeffporten.com.

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