

Optimizing Your Tools

Email, notes, to-do lists, and digital files.

This is the tactical session, and it comes third for a reason. Strategy without tactics is the slowest route to victory; tactics without strategy is the noise before defeat. Most people who buy a productivity app are attempting the second one.

So before any app: the tools are downstream of the system, and the system is downstream of knowing what matters. If you skipped those, an app will make you more efficient at the wrong things.

Four tools, and only four

Almost everything you are carrying around belongs in one of four places, and most people's problem is that they are trying to keep all four in a single place, usually their inbox or their head.

The four

A task list for things to do. **A calendar** for things at a time. **A note system** for things to remember. **A file store** for documents.
Different jobs, different tools.

What makes one good

It is with you almost all the time. It is simple enough that you will still use it in March. It does not create new distractions. And it is the right tool for the job rather than a clever tool doing four jobs badly.

Choose for the lowest floor, not the highest ceiling. The right tool is the one you will actually open, exactly as the best exercise is the one you will actually do. A capable system you abandon in six weeks is worth less than a plain one you keep. Every option below is a reasonable starting point rather than a recommendation you have to justify.

- **Tasks.** Todoist if you want a real task manager without a learning curve. Apple Reminders or Google Tasks if you want zero setup and something already on your phone. I use Toodledo, which is old and unfashionable and does everything I need; that is what it means for a tool to fit.
- **Calendar.** Google Calendar, Apple Calendar, or Outlook. Whichever your email already lives in. This category has been solved for a decade.
- **Notes.** Apple Notes or Google Keep for capture, whichever your phone runs. Microsoft OneNote if you think in notebooks and sections. (There is a class of power tools for people who want to build a linked personal library, Obsidian being the best known, and they reward the effort they demand.)
- **Files.** Google Drive, iCloud, OneDrive, or Dropbox. Whichever came with your phone is usually the right answer. Then go paperless and stop maintaining two systems.

None of this is new. George Washington interleaved blank pages into his almanac and recorded where he rode, who called, and with whom he dined. America's first printed daily planner appeared in 1773, laid out a week at a time with expenses on one page and appointments on the other. The paper index card in a pocket and the bullet journal are the same idea. The category is what matters; the technology is a detail.

Writing a task that actually works

- **Run it through the matrix first.** Important and urgent, do it. Important and not urgent, schedule it. Urgent and not important, delegate it. Neither, delete it.
- **Notice when a task is really a project.** "Do family history" is not a task, it is a category, and it will sit on your list radiating guilt for a year. A task is one physical next action.
- **Put everything needed to act into the task itself.** "Get a colonoscopy" is a wish. "Call the clinic to book a colonoscopy" plus the phone number is a task you can do in ninety seconds while waiting for coffee. The friction you remove now is the friction that would otherwise defeat you later.
- **Use the calendar as a tickler.** Anything that only becomes relevant on a future date belongs on that date, not in a list you re-read forty times first.

Capture, and the one habit underneath all four

- The tools only work if things reliably get *into* them. Whatever you are holding in your head is occupying space that could be used for thinking, and it is also being held badly, because memory is not storage.

- So the habit that matters more than any app is capture: the moment something arrives, it goes somewhere trusted, immediately, in whatever form is fastest. A voice memo counts. A photograph of a napkin counts.
- **One inbox, or as few as you can manage.** Most people have seven or eight without noticing: email, texts, a notes app, a paper pad, sticky notes, the thing their spouse said in the car. Every additional capture point is another place you have to remember to look.
- And keep the tags and folders thin. Elaborate organization is where productivity enthusiasm goes to die, and search has been better than filing for fifteen years. Two tags people actually use beats twenty they do not.

Email

Email deserves its own section because it is where most of the day goes. Research by Adobe put self-reported time at over four hours a day on work email, which is more than twenty hours a week, more than a thousand hours a year, and something like 47,000 hours over a working life.

- The root problem is that email was handed too many jobs: project management, task list, group discussion, file transfer, document editing, scheduling, and marketing. It is bad at all of them. Don Norman called it the office memo turned cancerous, extended to home and everyday life.
- Three specific harms. It is a growing time sink. It is a variable reward system, which is the same mechanism that makes slot machines work, because you never know whether the next message is good news. And it causes cognitive derailment, so the cost is not the four minutes reading it but the twenty spent finding your way back.

Defence: reduce the volume.

- **Keep accounts separated.** One professional, one personal, and one disposable address for anything that requires signing up. That third account absorbs an astonishing amount of noise.
- **Block what you did not ask for.** There is true spam, and then there is everything you accidentally agreed to. Unsubscribe aggressively rather than deleting repeatedly. Stop letting your inbox be a free billboard rented in your head.
- **Push against pull.** Almost nothing needs to be pushed at you. Good push is a genuine alert you would act on. Everything else should wait until you go and get it.
- **Create rules** so the sorting happens before you arrive.
- **Turn off notifications.** The only ones worth keeping are from people, not machines.
- **Keep it closed** unless you are actually working in it. An open inbox is a decision to be interrupted.

Offence: improve the workflow.

- **Pick a strategy and commit.** Inbox zero or inbox unlimited both work. Drifting between them does not.
- **Set limits.** Specific times, a fixed length, then closed.
- **Search, do not file.** Elaborate folder trees are a hobby. A search on the sender's name finds it about nine times in ten.
- **Follow one process per message.** Informational, do nothing. Needs a short reply, do it now. Needs several steps, it is not email any more, so send it to the right place.
- **Which is the whole point:** email is a communication medium, not a storage system. An action item goes to the task list. An event goes to the calendar. Information goes to notes. Nothing lives in the inbox because the inbox is a doorway, not a room.

Files, briefly, because nobody wants a section on files. Pick one cloud store and put everything in it, so there is exactly one place to look. Scan the paper that matters and shred the rest; warranties, receipts, manuals, insurance documents and tax records all belong in the same place your photographs already sync to. Name things the way you would search for them later rather than the way they arrived, because the version of you doing the searching will not remember the filing scheme. And keep the folder tree shallow. Three levels is plenty, and past that you are building a filing cabinet nobody will open.

And when you write it: assume it may be forwarded, assume tone will be misread, keep it short without being curt, beware reply-all, do not shout, do not send anything written while angry, and do not use email to hand someone a major project. Try the five-sentence rule. If it needs more than five sentences it probably needs a conversation.

TRY THIS

- Name your four tools out loud. If any category is missing, that is where your stress is coming from.
- Open your task list and rewrite the three vaguest entries as physical next actions.
- Create the disposable email address today and start using it for signups.
- Turn off every notification generated by a machine.
- Move one thing out of your inbox into the tool that actually owns it.

Use only that which works, and take it from any place you can find it. (Bruce Lee.)

Resources

Starting points, by category

- **Tasks.** Todoist. Apple Reminders or Google Tasks for no setup at all. Toodledo, which is what I use.
- **Calendar.** Google Calendar, Apple Calendar, Outlook.
- **Notes.** Apple Notes, Google Keep, Microsoft OneNote.
- **Files.** Google Drive, iCloud, OneDrive, Dropbox.

Pick one per category, use it for a month before judging it, and do not switch tools while you are still learning the habit. Switching is the most common way people avoid doing the work.

The email reset, in order

- Separate your accounts
- Add a disposable signup address
- Unsubscribe for an hour, once
- Write three rules
- Turn off machine notifications
- Pick zero or unlimited
- Set your two daily windows
- Route actions, events and information out

Referenced in this session

- Sun Tzu, on strategy and tactics.
- David Allen, *Getting Things Done*, for the underlying method.
- Don Norman, *The Design of Everyday Things*, on email.
- Adobe's email usage research.
- Bruce Lee, on using only what works.

Reading

- *Getting Things Done*, David Allen. The reference text for all of this.
- *A World Without Email*, Cal Newport. Why the inbox became the job, and what to do instead.
- *The Bullet Journal Method*, Ryder Carroll. If paper suits you better than software, and for many people it does.

Theme: thinking well. From my course *Getting Stuff Done*. The companion sessions are on priorities, building a system, and defending your attention.