

Productivity Essays

Rachel Andrew, 15th July 2014. This file created as an example of building books with CSS.

Your email inbox is not your to-do list	2
GTD and OmniFocus 2 - my productivity workflow	6
How to become good at estimating time	15

1. Your email inbox is not your to-do list

I get a lot of email. We all get a lot of email. I invite readers of my weekly email to reply to me - and they do. We get a lot of email about Perch. I get email about books, speaking engagements, asking me for advice, showing me side projects. I read and try to reply to all of it. Perch support is dealt with in a separate help desk system and dealt with regularly throughout the day, but that leaves me with a fair amount of email that needs dealing with.

Inbox Zero is not a new concept, but I think sometimes people assume that achieving Inbox Zero means you should have done all the things. I'm not sure what I'd do if I got to a state of having done all the things ... find more things, most likely! Inbox Zero is about moving stuff out of your mail inbox and to some other system where you can prioritize the actions hidden in those messages.

Your email is a terrible place to keep your to do list. Partly because it is likely that those items are linked to other parts of your system - files, things in Evernote, posts on Basecamp. But also because emails sat there

feel like they are constantly nagging you to act on them, whatever their priority.

How I deal with email

I use IMAP email hosted over at Tuffmail. I only use Gmail for mailing lists, so while I know there are lots of tools for Gmail productivity, I can't use them - although feel free to share your favourites in the comments to help other readers.

I have a set of daily tasks that pop up in OmniFocus at 5.30am so they are ready for me when I sit down to start my day. The first is to check my calendar, the second is Process Email.

I know a lot of people would suggest that you don't check your email first thing as it can sidetrack you. However the point is that I process the email first thing, and it's a very different job to actually dealing with all of the email.

There is always a bunch of stuff to delete or just file. I keep an email folder named 1current and into that folder I pop things like tracking information for things I have ordered that I just need to keep until it arrives.

There are then usually a few things that just need a quick reply to show I've seen it. If it takes less than 2

minutes to deal with, I reply there and then and file the email away.

Then there are those things that need more time to deal with. They tend to be things like:

- An email from a reader wanting to ask my feedback on something.
- Emails about things that are in progress, one of our contractors with something for me to look at and respond to, or an article back for a second draft.
- Requests to speak at conferences, write articles or some other paid work that I need to think about and decide if I can fit in.

There are actions associated with all of these and if I start to just plough through them then I could get sidelined from whatever is important that day. Having read the mail and checked nothing is an emergency I add any tasks relating to that email to a project in OmniFocus. The task might just be “reply to Joe Bloggs with some thoughts about his idea of an airbnb for cats” or it might be part of an ongoing project. If the sender would be expecting a response immediately to know when the task will be done, I can then send a quick reply on that before filing the email, flagged as needing a reply.

In terms of filing I actually have a folder for each ongoing project, however you could use labels in Gmail or organize these any way you like.

Most mornings I will send a handful of replies and add around 10 actions to OmniFocus. I can typically do this in the time it takes me to drink my first coffee. My inboxes are then at zero, and I know that no urgent things are missed.

Having this routine then allows me to be less driven by email that comes in during the day. Depending on what I'm working on I may also process email during the day, but I am also happy to scan for genuine urgent stuff, and leave everything else until the next morning's processing session.

So that's how I deal with email.

I'm going to write a few productivity and getting things done type posts because when I talk about building side projects the number one question is, "how do I find the time?" I stayed away from discussing tools too much in my book, as I think tools and specific techniques are quite personal. However I'll share what works for me here and in my next post I'll write about how I use OmniFocus to make sure that those tasks I've added to projects get completed.

2. GTD and OmniFocus

2 - my productivity workflow

I work from home running my own business, I've been running a business since 2001 - we did have an office for a few years but once we stopped taking on client projects to focus on Perch full-time, the office made little sense. In addition to Perch, I write books and articles and speak at conferences. I'm also a mother, something of a fitness fanatic, a family historian and I try not to let my house fall into chaos while I'm doing everything else that needs to be done.

I get a lot done, and this post is about how I organise my life, leaning heavily on the Getting Things Done (GTD) methodology and OmniFocus for the Mac, iPhone and iPad.

I'm going to assume you know a bit about Getting Things Done as a methodology already. If not here are the basic steps and the book is well worth a read.

Collecting

I stick everything and anything into OmniFocus.

Whether it is something I need to buy next time I venture out to the shops, a race I want to read about to see if I want to enter, a blog article title that just popped into my head or a major project such as the relaunch of our Perch Forums.

I tend not to leave things in the OmniFocus inbox for long. If I'm doing a big collecting session I might create a big list but then I quickly give things a Context and Project.

Contexts

My current Context list is as follows:

- *Computer* - anything I need a computer for but could be completed anywhere
- *Office* - if I need to be physically located in the office (for example recording a screencast)
- *Home* - stuff round the house, not computer related
- *Errands* - out and about
- *Phone* - needs a phone
- *People* - stuff relating to other people that I need to keep track of

- *Waiting* - things on hold
- *Someday / Maybe* - a bucket for ideas, things I might do at some point
- *GTD* - a meta context for tasks relating to my system

I try and keep contexts relating to where I need to be to perform the action, and to have as few as possible. I used to have a Computer - online, Computer - anywhere context however other than when I'm on an airplane I am usually not far from an internet connection.

I work from home. I run a business that happens 24/7. It makes no sense to me to split my to do list into work things and non-work things. Even if you go to an external office, if you are running your own business and have control over your time it often makes no sense to split things into work and not-work. It creates a false dichotomy and adds to the feeling that you are doing the wrong thing if you do a personal task in "work time" or a work task in supposed "personal time".

Projects and Single Action Lists

In GTD-speak a Project is anything that requires more than one action to complete. OmniFocus gives you

three ways to represent your Projects, which gives a good degree of flexibility and a method of storing related things that really do only have one action. When creating or editing a Project you can set it to be:

- *Parallel* - the actions can be completed in any order
- *Sequential* - the actions need to be completed in a set order
- *Single Action List* - a special type of project consisting of individual actions

I use Single Action Lists for things like shopping lists, there are various places I visit locally, the town centre for example or a major supermarket. When I think of things I want to get when I walk into town I add it to a Single Action List for “Shopping: Town Centre”. I also use Single Action Lists for article, blog post or presentation ideas that I have thought of but haven’t yet decided on the research needed to write these.

For real Projects whether they are set up as Parallel or Sequential just depends on the type of Project. Some things - recording a new video tutorial for Perch for example - follow a set series of tasks and so are Sequential. Some other Projects have tasks that do not depend on each other and so I can pick them off in any order.

I organize Projects into Folders. When we did client work I had a folder per client, these days I have a folder for rough areas of work and interests just to make it easy to know where to put a Project when I create one. So I have a folder that contains Writing projects, one for Presentations/Speaking, one for Perch, one for Fitness Training and so on.

Repeating Projects and Actions

There are some things that need to be done on a weekly, monthly or other regular basis. I deal with most of the operations side of things at Perch, I also deal with fun tasks like the VAT return. By creating a Project that repeats on a certain date I can make “Complete the VAT Return” pop into my lists two weeks before it is due, at the point at which our bookkeeper should have reconciled all the the payments and receipts that make up the data for that report. Operation related tasks such as running updates on servers can be repeated too, so they appear and remind me to do them.

Due Dates and Deferring

OmniFocus allows you to set a date to defer an item until - in which case you can hide it until that date

arrives. You can also set a date by which the item is Due. If you look at the Forecast View you can then get an overview of tasks that are coming up. I try to avoid assigning due dates to everything in my to do lists, the things that have due dates are things that actually have a deadline. There is nothing more stressful than constantly feeling nagged about completely arbitrary deadlines! I do think there is great power in setting deadlines but if you do it with every minor task it is likely you will just start ignoring the nagging reminders!

Deferring tasks is really useful. It saves having things appearing in your Contexts and taking up your energy when you are not ready to act on them. I have a whole host of deferred items in my current lists - for example a Project to write a new talk for a conference that is happening in October. I don't want to start writing that until later in the summer but having the project set up means that if I spot things that might be related to the subject I can store them alongside it until such time as it reaches the deferred until date and comes back into my lists.

Special GTD Tasks

When I explained my Contexts I mentioned that I have a special Context called GTD. Here I store a key part of

my system - the Daily Review. This is a Project set to repeat daily at 5.30am as a Sequential type and set so that ticking off the last action completes the Project, I typically tick off the tasks within it while having a coffee first thing in the morning.

- Review Calendar
- Process Email Inboxes
- Process OmniFocus Inbox
- Review Current Goals
- Check All Projects have a Next Action
- Flag Priority Actions for today

Each morning I go through this list, first checking my calendar so I know if I have any appointments booked. I'll also check the OmniFocus Forecast View to see if anything is coming due over the next day or so.

I then process my email inboxes. Many people would say not to deal with email first thing in the morning but it works for me. [Chapter 1 \(page 2\)](#) covered my process for dealing with email.

I then make sure any items sat in the OmniFocus inbox have a Context and Project, or have been moved to a Single Item list.

Review Current Goals is a reminder to me to check that all of the Projects I am accumulating are linked to the

goals I am working towards, both professionally and personally. I keep a separate list of bigger picture goals and use those to assess whether something makes it as a project or should be popped into Someday / Maybe for the time being.

Check All Projects Have a Next Action is important. If a Project is current then it should have a Next Action, even if that is deferred or flagged as Waiting For (perhaps if I am waiting for a freelancer to complete some work on that project). If Projects are sat there with no Next Action they should either be placed on hold or marked as completed.

I then use Flags in OmniFocus to select the high priority tasks for today. These will be the things I tackle first. If I get through those then I will just move onto the Next Actions for any of my ongoing projects. When I used OmniFocus 1 I was far more reliant on these flags than I am now, the new version really suits well the way I work so I find I flag far fewer things and just rely on well set up Projects and Actions.

As I do this Daily Review I am less strict about doing a regular weekly review, as I tend to keep things fairly tidy on a daily basis. Instead, often when a bigger project has just gone live, I'll dedicate half a day or a day to thinking about my Goals and Projects and having a big thinking and organizing session, at which point

things which I can see have not been touched since the last time I did this will be reprioritized or dropped as needed.

So that's my system. Productivity is a hugely personal thing and I've taken inspiration from many other systems and approaches that I've read about in the past. OmniFocus have recently launched their Inside OmniFocus site that has other workflows explained. Perhaps some of this will be helpful to someone else - feel free to add a comment with your own thoughts, especially if you are using some features of OmniFocus that I haven't covered here.

3. How to become good at estimating time

To be able to do any kind of accurate planning you need to be able to make a reasonable estimate of how long upcoming tasks will take. If you are a freelancer working for clients, you will usually need to give some kind of estimate of time and cost. If you move into working on your own products being able to estimate time is still important.

In this post I'll explain how I have learned to become better at estimating the time things will take me, and how I stay on track.

The importance of time estimates in product development

If you want to pre-announce a new product or feature to your customers you need to be reasonably sure that you are able to ship. You may find that good advertising opportunities need to be booked far in advance, you need to be sure that the new product will

be ready when an expensive advert goes live. If you are working with other people - a co-founder, employees or freelancers - being unable to estimate how long the tasks you have in hand will take makes you hard to work with. You become the person who never comes through, it's stressful for everyone.

Most of us are terrible at estimating time

The natural thing to do is to be optimistic. We think everything will be a quick job. When asked we give an optimistic response, usually on the short side and without factoring in all of the other things that eat up time each day. We want to please the person asking; we interpret “how long will this take?” as “tell me you will have this ready tomorrow”. Even if the only person putting on pressure is ourselves, we can become really good at being overly optimistic in our own mind!

You have to track what you do

The only way to get good at estimating time is to start tracking your usage of time. Crucially you need to track your usage of time against how long you thought it would take.

A great way to do this is with the Pomodoro Technique. At the beginning of your day, decide what it is you need to get done. You can then assign a number of “pomodoros” - 25 minute blocks of time - to each task. So I might have:

- Write blog post about new feature in Perch - 3 Pomodoros
- Write and send our customer newsletter - 3 Pomodoros
- Run updates on our servers - 2 Pomodoros

I then start doing the work, I log the actual number of Pomodoros taken to do each task. I also log the time I spend not on those defined tasks. Perhaps I end up spending time answering emails, dealing with support or a problem with some part of our server infrastructure.

After a week of logging, patterns start to emerge. I realise that blog posts typically take longer to write; or that once I start running updates on servers something almost always happens that I need to investigate; or that I don't ever get through all my tasks for the day because of the time I spend in support. Next time I set up my tasks for the day I can use this information to help me plan. Over time it gets more accurate.

Stop using unusual events as an excuse for poor time management

An excuse for being bad at estimating is that unforeseen things sometimes happen, which throw a massive spanner into the works and blow up the schedule. The conclusion drawn is that because sometimes things take longer than anyone could have guessed there is no point ever estimating how long anything will take. The thing is, these things tend to be fairly few and far between and are understandable to everyone when they do happen.

What is far harder to deal with, and far more damaging ultimately, is that slow creep. If you have estimated 2 hours to complete a task and it takes 3 that doesn't seem so bad in isolation. However, if for every 8 tasks you accrue 8 additional hours - that's a full day of a schedule.

You don't need to do this all of the time

You'll find after a while you become better at estimating time, and you can stop obsessively tracking everything that you do. However it is likely that over time you'll fall back into your old optimistic ways of estimating. I find it useful to have a tracking week ever month or so, just to make sure I know where my time goes.

No secret sauce

So that is how I've become better at estimating how long things will take, and how I keep myself on track. It's a simple and rather boring approach ... but things that work often are.