



CPE Technical - New Starter Guide

John cable, October 2015. This file created as an example of building books with CSS.

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1. Introduction

Welcome to ?teamname?!

As a new starter in ?teamname?, this guide has been pulled together to make your initial days more satisfying and productive.

This guide covers the following areas:

- Administration - those things that you need to do to make sure you are up and running in your new role e.g. ID card, access to printing/ photocopying etc
- Links - a collection of useful links to web sites and other information either hosted locally, on the University of Warwick network or externally on the internet
- Glossary - an introductory guide to various acronyms and abbreviations that are frequently used in the Centre

Let's look at each in turn.

2. Administration

3. Links

TEL - Training Needs Analysis - not sure we need this
<http://goo.gl/forms/94t0BnPm82>

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 no 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.

4. 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.