**YGT episode 180**

You're listening to. You've got this episode one 80 welcome to, you've got this, a weekly podcast for higher education professionals looking to increase their confidence and capacity for juggling the day to day demands of an academic life. I'm your host, dr Katie Linder. In this episode, I want to share with you a kind of shocking turn of events, and I have to say I wasn't entirely prepared for this to happen, but it has been such a welcome addition into my planning and organization that I kind of felt like I had to share it.

And especially since it is kind of turning my. 2020 planning tools on its head in terms of what I'm using right now in organizing kind of my planner life and my schedule. So let me tell you the story of what happened. So on the day before I started my new job, so this would have been on Sunday, I started to get a little bit nervous about all the information that I was going to be processing.

And this is in part because, um, I knew I had a lot of meetings on my calendar. I was meeting with . All 10 of my new staff members. I had several hours of orientation meetings with my new boss and I just started thinking about how was I going to be taking notes about all this information and processing it.

And um, to be completely honest with you, I was getting a little freaked out and a little bit scared of just how I was going to process all this information. Now, if you've been following me on social and particularly in Instagram stories, you might've seen me mention a tool recently over the past couple months that I've been exploring called notion and notion is an online tool that allows you to basically build systems from scratch through the use of.

Pages and what are called databases that can be linked within this tool. And I had started exploring this as a way to manage, so in my coaching client session notes, and I was following the videos of a woman in Canada, her name is Marie Poulin. I'll go ahead and link to her in the show notes. And she had been kind of using notion as a way to really process, um, like knowledge management and task management in her life.

As you know, using her planner. I'm using notion basically as her planner, I should say. And I have watched some of those videos and just thought, you know, well, I've got this whole system of paper planning and I don't really, that's not really for me. You know, like I'm not really a digital person when it comes to a lot of the stuff that I work with in terms of to do lists and things.

I want to have them written down. And so I'd kind of, you know, just set that aside. And I was using notion for some other kinds of, um, task management around kind of my coaching clients. Well on that Sunday, I thought maybe what I need to consider is actually taking some notes digitally in these meetings.

In part because I knew I would be able to do it a lot faster. And that I would be able to get a lot of information down. Um, and, and I was kind of just imagining in my head if I had like a notebook or something where I was writing this stuff down, I just felt like a lot of things would get lost. How would I pull out kind of the action items from each of those meetings?

The things that I needed to, you know, move forward in a particular way. And I also knew that in this first week of the job, I was going to be trying to locate some different projects and things that my team would be working on. So that's what was really making me nervous, was how do I kind of like scrape this information in some ways and pull out the different action items.

Now I thought back to when I started my job at Oregon state and my system, there was very paper based. I had, um, a notebook that was from the, um, ghostly action method, which I can link to in the show notes and basically how to space on the notebook page to take notes and then a separate area to pull out action items.

And that's what I used when I was first starting that job. And I would kind of set the action items to the side. And then when I got to my office, I would write each of the action items on a post it note and put them on my whiteboard. And what I found was that I had a full whiteboard at one point and people would come into my office and it really gave them kind of a visual idea of all the different pieces that I was working with.

Um, and then each day I would come in and I would look through the, the post-it's. Now it can take some down and work with them, but at a certain point I had dozens and dozens of these post-its. And as you can imagine, that method of using those post-its didn't really allow me to set deadlines. It didn't really allow me to categorize those to do's with any particular kind of project.

It was really my very rudimentary way of processing a lot of information. Um, and I, I knew as I was thinking about this new job that I've actually come a lot further in terms of my own organizational strategies. I've learned a lot about what works for me. And so I decided that I wanted to create basically a series of templates in notion that would allow me to manage, um, the note-taking for this new job.

Well, let me tell you, dear listener, what happened, I basically ended up transitioning. All of my planner into notion to help me manage my week in terms of my calendar, in terms of my to do lists, and I am now almost an entirely digital person and I am no longer, I didn't even take my planner with me into the office at all on my first week.

I know. It's shocking. This is a shocking turn of events for me too, so I thought what I would do on this episode is talk through some of the things that I have built into the thing that I have in notion. I don't, I'm not even sure what to call it. It's basically kind of a weekly planning mechanism. You could think of it as like a digital planner.

And one of the strengths of notion is that you can really personalize things to what you want them to look like. So the first thing that I've built in to this kind of weekly spread that might be a way to think about it, is my top three priorities of the week. And I took that idea from my get to work book planner that I've used for years and years and years in which I still love, um, that there were always kind of three things to identify for the week.

They were top priorities. So that's kind of listed at the very top. Then what I've done is I've embedded a database, like a relational database that is a master task list, and this master task list has the name of the task, the deadline for the task, um, the status of it, whether it's like on deck or I'm waiting for someone or it's in process or it's completed the level of effort and also the level of impact of doing that task.

If it is associated with a particular project that I have on my plate, and then I've also tagged it about whether it's for my side business, for my personal life, or for my work with Kansas state. Now what you can do with a notion, which is really kind of cool, is filter and sort these relational databases.

So I can link to this database within my weekly plan and then I can filter it and say, I really only want to see things for this week. So I only want to see things as I record this. The week that's coming up is February 10th through February 16th I can narrow my to do list and just have the things for that week showing on my weekly planner.

Now, right now, if I were to guesstimate, I'm kind of looking at my screen. There's probably 40 items that are on this to do list, and I have them organized by date, and as I crossed them off the to do list is going to kind of shrink because one of the ways that I've sorted that to do list is I only want to see the things that aren't checked off yet.

So as I check things off, they get removed from the list and I get to see that list shrink over the course of a week, which is kind of exciting. Okay. Then I have this option of putting out my weekly spread in terms of the to do list that I would typically have done in my planner and the meetings that I have coming up.

So what I have done with in this area is I've created some templates, which are pretty cool. Um, I have the option of creating what is called, like a notes template, basically for any meeting. And I can pre create those notes, templates, and just kind of drag and drop them into the, the different parts of my calendar.

So I have a. Kind of five column spread for Monday through Friday, and I've divided that spread into morning, daytime, and evening. And I also have a special section that I'm outlining because I now have an administrative assistant, and so sometimes I am assigning her to do certain tasks and so I can track her to do items in this spread as well.

Now, the note taking piece that got embedded here has been a game changer for me. I created a notes template that has a space on the left for me to take notes. Just general things I'm writing down, but on the right, I've included some information about who's attending that meeting. If there are any action items that are coming out of that meeting.

If there are any questions I have based on that meeting that I need to ask someone else. And also if there's any documents or resources or references that I want to like link to that particular meeting, and that could be a website, that could be a handout or something else that I'm receiving in that meeting.

Now, this is allowed me to track all of the action items that are coming out of each of these meetings and to eventually transfer them into that master task list and to think about if they have a deadline or if they have something that I need to be considering in terms of, you know, when they're due or what project I want to associate those particular things with.

This is also a system that really easily allows me to move things around, to create new, um, work events or, um, uh, personal events if I need to kind of add things in here. And I've also color-coded things. So the work events are purple because purple is one of the colors of Kansas state. And I've got some events in blue.

If they're like my coaching calls that are happening in the evening, I have kind of a tan color for things that are more personal events. And I've also put in things that are habits for me right now, like my morning pages and my workout sessions, so that these are things that can all get checked off as well.

So I have a spread that also includes the weekend a little bit further down. Um, so I, there, my planner is basically being replicated in this digital space. And what is interesting about using a tool like notion is it allows you to take things that you've already learned from how you use them in other spaces and apply them to this digital space.

So I'm, I'm doing things that are basically the rough equivalent to what I was doing on paper. So a little bit further down that page. I also have created some tables that allow me to track the tasks that I want to do on a weekly basis and a daily basis. And this is a kind of, um, layout option that I am pulling directly from.

Um, the power sheets. The idea of kind of tracking weekly and daily tasks is something that I was doing in my power sheets. So it's allowing me to see for hours throughout the week and throughout the day, am I kind of getting to the things that I think are important. Um, for example, like doing my morning pages or drinking a certain amount of water or hitting 10,000 steps or getting into bed on time.

Um, those kinds of things I can kind of track and see patterns with over time. Then at the very bottom of this weekly spread, I have. Created some weekly reflection questions that allow me to, at the end of the week kind of process, what are the things that are going well? Is there anything that was a little bit frustrating?

Did I have a lesson that I took away from that week? Um, and are there things that I'd like to approve improve, or things that I'm kind of hoping to change in the future now because I have set up these weekly spreads within notion as a database. I can actually, after I've done this a few times and gone through several weeks, I can actually kind of compare in a table view or in a couple of different other views.

That notion allows you to look at. I can compare my weeks to one another so I can look at things like effectiveness or the kinds of emotions I was feeling in a particular week or the things that I was grateful for or anything I really want to track on a week to week basis. I can go in and look over time and see how things are going.

So one of the things that I noted, for example, in this first week on the job, cause I have implemented this system and I'm a week into it, is I was often tired and I often felt like I had a full brain, not too shocking for the first week on a new job. But my hope is that over time I'm not going to feel that way as much.

I'm not going to feel like I'm overloaded with information all the time. So, um, as I said, I implemented this for an entire week. And what it really allowed me to do was see all the to do's and really track them, um, to take notes in a really efficient way. When it came to all the meetings that I was trying to track, it also allowed me to pull out those to do items.

That were important for me to kind of think about and schedule throughout the rest of the month. And then the other thing I was able to do was really efficiently pull out a series of projects that I think are the things that my team will be working on over the coming months. And I was able to kind of thematically move those things into three goal areas that we'll be sharing with my boss this week.

I can almost assure you that if I had not been taking these notes digitally, I don't think I would have gotten as far as I was able to in the first five days of this job. I felt very nervous about implementing this new system. Basically overnight. I felt like it was very much a trial by fire and I was either going to like rocket or it was going to go down in flames, like I really didn't know.

But I also think this is a really good example of how I trusted my instincts and my instincts were telling me that my current systems were just not going to be good enough for what I needed for the new job. So, um, I want to offer this as an example of how. Even if you have systems in place that you love, that are working for you, that have worked for you for a long time, sometimes you can disrupt those systems.

Or sometimes you can take the principles of what's working in those systems and change up the modality of what you're doing. Now, I expect that I will have much to say about these systems and how I'm creating them. And I'm actually already working with some of my coaching clients on implementing similar systems because they know that I've been kind of working on this particular tool and they're interested in how it can work for them too.

Um, so I will probably be talking about this quite a bit more in the future. But for now, I just want to say that I think it's important to stay open to making changes, and I thought you would have to pry my, you know, paper planner from my cold dead hands. I did not think that I was ever going to give it up because I love it and I still love it.

It is still a tool that I think is so helpful. I feel the same way about the power sheets. I continually will recommend these tools. But for me right now in my professional life and the kind of cognitive things I'm being asked to do, I needed something a little bit different. So there's a lot more. Um, like I said, that I can say about notion in particular, how I set up a lot of different projects in here that I'm kind of.

Linking to do list too. And there's a lot of ways that you can use a relational databases with a notion and some really creative and interesting ways. Um, so I hope to share a little bit more, but in the the meantime, I'm gonna link to some videos on YouTube just so you can kind of get a sense of what I'm talking about because I think it's a little hard to talk about something visual in a way that you can kind of not feel like it's completely abstract.

So I'll link to some things. I'll link to notion in case you want to check it out for yourself. Um, but this has been a really. Fun thing to explore. It's a great way for me to be kind of creative in the midst of taking on a lot of new information, and of course I had to keep you all updated on what this looks like for me right now.

So I would love to hear if you are implementing any new organizational strategies in your own life. You can always tweet to me at Katie double underscore lender. You can connect with me on Instagram at Katie underscore lender, and that's where I'm sharing some kind of screenshots and things of notion.

If you want to connect with me there, you can also email me@helloatdrkatielinder.com and you can also write me a letter at PO box 1973 in Manhattan, Kansas. Six, six five zero two and however you contact me. I always love to hear from you, and especially when you're trying new things that you think might help with your productivity to make it more meaningful and efficient.

Those are always some of my favorite things to hear about. Thanks for listening. Thanks for listening to this episode of you've got this show notes and a transcript for this episode can be found at Katie linder.work/podcasts if you found this episode helpful, please also consider rating and or reviewing the show in iTunes.

Thanks for listening.