**YGT episode 226**

You're listening to, you've got this episode 226. Welcome to you. 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. So I labeled them episode a shocking turn of events, part two, because it was around this time.

Last year that I announced that I was going fully digital with my planning. And I had just started to use notion. I was just starting my new job and I needed to have a better place to take notes. That was kind of my primary concern. So I ended up doing a, uh, big switch. And in that episode, which I can link in the show notes, I talked about how I was really a kind of lifelong, uh, handwritten planner type of person and how much I really enjoyed.

Writing things down and lists and things like that. And, um, so it was a big deal for me to kind of switch to the digital planning. And over the last year, you've heard me talk about notion probably in various places, but here's the second shocking turn of events, which is I have transitioned off of notion and I have transitioned to a new platform called.

Click up. So I'm going to tell you a little bit about it and why I made this transition and whether or not this might be a good tool for you, because I'm not sure it's good for everyone. And I, I definitely don't think everyone who is on notion. Like if people kind of followed me over there, um, you may not want to follow me over to click up.

Um, so let me talk a little bit about it. First of all, I should say, I'm still using notion for a couple of things. Primarily I'm kind of tracking and taking client notes for coaching. I'm still over there kind of using that platform. And there's a lot of things that I really like about it, especially the fact that you can design it in different ways, that kind of, um, work for different tasks that you're trying to do.

And different kinds of, um, collaborative relationships you may have on that platform. But there were a couple of things with notion that over time were a little bit challenging for me. So one of them was notion, at least right now doesn't do very well with recurring tasks. And this was something that I was doing a lot, especially for like annual planning for my business or monthly things that I had to do for my business book keeping and things like that.

I was frequently having to copy and paste tasks multiple times and set them up in certain ways at which it's really time-consuming. So the recurring tasks and having that not be a little bit more streamlined was a little bit tough for me. The other thing that I had started to explore recently was whether or not I could embed like progress bars into a notion.

And there were ways to kind of embed some widgets and things, but I played around with it for a little while and it was just not working. It was, it was challenging. And I didn't really have the time to give to that. And then the other thing, uh, is that when I'm working in notion, I can't have notion up in separate tabs.

So, uh, or at least I haven't figured out how to do that. So when you would open up a new thing in notion, you had to just be in that one thing in notion, you couldn't necessarily open up separate tabs of separate spaces and notion. Um, and that was also a little bit challenging for me, cause I would sometimes like to be doing multiple things at once in there.

Well, one day I was over on YouTube as, as one is, and I, uh, found a video of someone that said is click up the new notion. And I was like, what is this? Like, I have not heard of it yet. And I feel like I, I know a good amount about these tools. I mean, I, I look around, I try to figure out what the latest productivity tools are and I hadn't really explored click up.

So, um, click up has been around for a few years. It's recently gotten some attention cause it's done some. Uh, investing like angel investing and it's raised quite a bit of money, um, for the next round of, um, kind of updates and things that they're working on. And this is how I would compare, click up to notion.

So notion is a platform that's really built on this concept of databases and building databases and kind of linking things together. And if you have projects that are, you know, like a customer relations management system, or you're wanting to link a lot of projects together, and that makes sense to you, and that's kind of the foundation of the work you're doing.

Notion is going to be an excellent fit for that click up it's main foundation is lists, and this is what initially drew me into this platform because when it comes down to it, I am a list person. I've always been a list person and I use lists to organize pretty much everything. And so when I saw the click up was really based on the concept of lists, I was like, Oh, okay, this, this makes sense to me.

This is like a very natural fit for the kind of work that I do and the kind of organization that I use. So basically what click up is, is a collection of your lists. And you can put those lists into what are called spaces, uh, which is kind of a bucket that you could label with spaces. And then you have folders within each of those spaces.

So for example, I have spaces called professional development where I have lists related to the yoga work that I'm doing, the project management credentialing work that I do. Coaching development for myself. And, um, what I'm now doing with talent development, which is a new credential that I'm kind of working toward.

And then I have a, a space or like a bucket that's related to my day job and lists of related to that. I have one for my business and then I have one that I've just labeled personal. And within those, I have different folders that are kind of breaking things down and then I have less than each folder.

So here's the thing with KickUp. It does recurring tasks incredibly well. There's a ton of different settings for how you can put together these recurring tasks. So that. First of all, I was like, okay, I'm kind of sold just because of that. It also has progress bars and you can do things like create a task and then have a bunch of sub tasks underneath that task.

And then as you're checking off the sub tasks, it shows you the progress bar of that particular task. It also has the ability to create what you can also do in notion, which is basically create a dashboard. And I, this was something that I didn't want to give up because I really like having the dashboard and notion I check this pretty much daily.

Um, it's where I collect all of my big goals for the year and things that I'm tracking. And there was this amazing thing that you could do in click up where you could kind of gather a bunch of things into what is called a portfolio. And then it would show the progress on each of those things. And you could group it into your dashboard.

So. For example, let me try to make this a little more clear. I have a portfolio of all of my professional development lists of what I'm working toward right now. And that includes, for example, the next credential for my yoga teacher training. It includes the, um, exam prep for this next exam. I'm taking to be a certified professional, intelligent talent development.

It includes, um, the continuing education that I need to gather for my. Project management credential and for my discipline to agile credential. And I can like at a glance, see what is happening with each of those things in terms of the progress, I can click into any of them and kind of look at any of the lists, but I love having that kind of grouped in one spot in my dashboard.

So that's a pretty cool feature. And then one of the other features I really like with KickUp and it is a paid feature. So I'll just mention that click up a, what I'm paying for it right now is less than $5 a month. I did find like, uh, a discount code on a YouTube videos that I used. So I think I'm paying somewhere between four and $5 a month for click up, just to give you a sense of what it, what it costs.

And if you pay that fee, you get what is called a goals area. And you can set yourself up with different goals that you're working toward, and then you can have different. Kinds of ways of measuring those goals, um, so that you can see if there's like different inputs to those goals. So for example, I have, um, certain lists that are tied to goals and that's one of the kind of cool things you can do in click up is you can say, for example, I have my 21 goals for 2021.

And I can say my goal is to get all 21, you know, if those goals and then I just link the list. And so whenever I update the list and I kind of check off one of those goals, the goal gets updated in this other area. It's pretty cool. As somebody who's really motivated by things like progress bars and seeing in a visual way, the kinds of, um, Progress that I'm making on different projects and things like that.

I've really appreciated some of these more visual elements of click up. So, um, click up also has what is called a list view, which is basically just a to-do list view. They have a board view, which is the Kanban view. If you're familiar with that, kind of like what Trello offers, they have a calendar view, they have a table view.

So there's, it's, it's very similar in a lot of ways to what you would see in notion, which is what made it feel very comfortable for me to make the transition. And I would say, I mean, I think I've talked in the past. I had had a lot of stuff over in notion and I probably transitioned about 90% of it over to click up over the course of about a week is what it took me to do that just little bits here and there, trying to make sure I was kind of importing it in a way that made sense to me.

And the other thing I'll say, I just found like these little things that were making this experience better for me, when you try to add in like multiple to-do items into notion. Notion doesn't always understand that there's multiple things that you're trying to put into like a table. And so it'll just put them all into like one row and then you have to like, literally copy and paste things into their own spaces.

But if you put things into click up, click up says, Oh, is this 15 different tasks? That you have like pulled from a list and then it will create separate tasks. Like it, it kind of understands that you're copying in something that's like a bulleted list or it's like a multiple item list. And again, it just makes it super fast to add things, to click up in bulk, if that's what you're trying to do.

And you're just trying to kind of drag things over from like a table or something like that. It makes it real easy to do that. So I've been in click up now for, I would say. Probably about a month. Um, because I think it was the week of January 6th, um, that I was transitioning this over. It actually was a great distraction for everything that was going on that week.

It was a bit challenging. And as I record this, um, we're getting into like the second week of February. So I've been in up. Full-time pretty much for about a month. And basically what I use it for is I, I go to what I call the everything view. It's what they call it. It's just basically your list. But then I, um, I filter it by just this week so that I can look at what's happening, um, just for like the next seven days.

And I will go in and add in like my appointments and things like that. I give all of my to-do items, a date and a time, so I know kind of what the deadlines are for things. And then it orders it chronologically on the list. So if I have like, uh, two meetings in the morning, I have one at like nine o'clock and one at 11 o'clock.

I might put like a task in for that 10 o'clock slot in between the meetings so that I know kind of the order in which I'm trying to get things done throughout the day. And it's a relatively simple, uh, user interface. I mean, it's, it's not complicated. Um, you can definitely find some YouTube videos and things on.

On click up so you can kind of see what it looks like, and you can also get a free account if you want to go in and play around with it a little bit. But again, I would just say, I think the reason this is working so well for me is that it's list based. And that's really what it is. It's just a bunch of lists and you can kind of look at those lists in different ways, but because I've always been a list person, I felt like I was kind of with notion.

It was a little bit of like a square peg into a round hole. Like I was trying to make it work for me. And like I said, there was a ton about notion that I still really like. Um, and I like the collaborative aspect of notion that you can invite people as guests to different things. Um, click up isn't as easy to do that.

So that's one drawback, uh, in terms of just like collaborative collaborations and sharing pages with people. Um, but it's a lot easier for my brain to kind of think about things as lists than to try to think about all of these different database connections. So. I wanted to just share that I have this new tool and, uh, I think it's something worth checking out if you happen to also be a list person too.

So I will link to click up in the show notes. I will link to last year's, uh, episode talking about the shocking turn of events, which was me going over to notion. And, uh, let me know if you decide to look at this tool and if, or if you have questions about it, I'm happy to talk about it a little bit more.

So you can always email me at hello at Dr. Katie linder.com. You can tweet to me at Katie double underscore Linder. You can connect with me on Instagram at Katie underscore Linder. Anyway, you contact me. I always love to hear from you. Thanks for listening.

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