

Personal Information Management

A **Second Brain** for Project Managers

By Will Farquharson

PIM for PMs

A critical technical skill, allowing you to:



**Reduce
Stress**



**Work
Smarter**



**Utilise Your
Experience**



**Be
Reliable**

| Objectives

- **Convince you that PIM is a critical technical skill for Project Managers**
- **Introduce you to some tools and systems you likely haven't seen before**
- **Help you get started on improving your own PIM skills**



Information Exhaustion

A 2009 study cited by the New York Times estimates that we consume the equivalent of **174 full newspapers'** worth of content each and every day, **increasing 5%** every year on the previous year

Presentation Overview

- ~~Introduction and Objectives~~
- A Brief Story
- **Work** Information vs **Personal** Information
- The Fallible Human Brain
- PIM History
- Modern Tools and Systems
- Getting Started Yourself
- My Journey / My System

A Brief Story



Maverick Morris
Engineering Manager

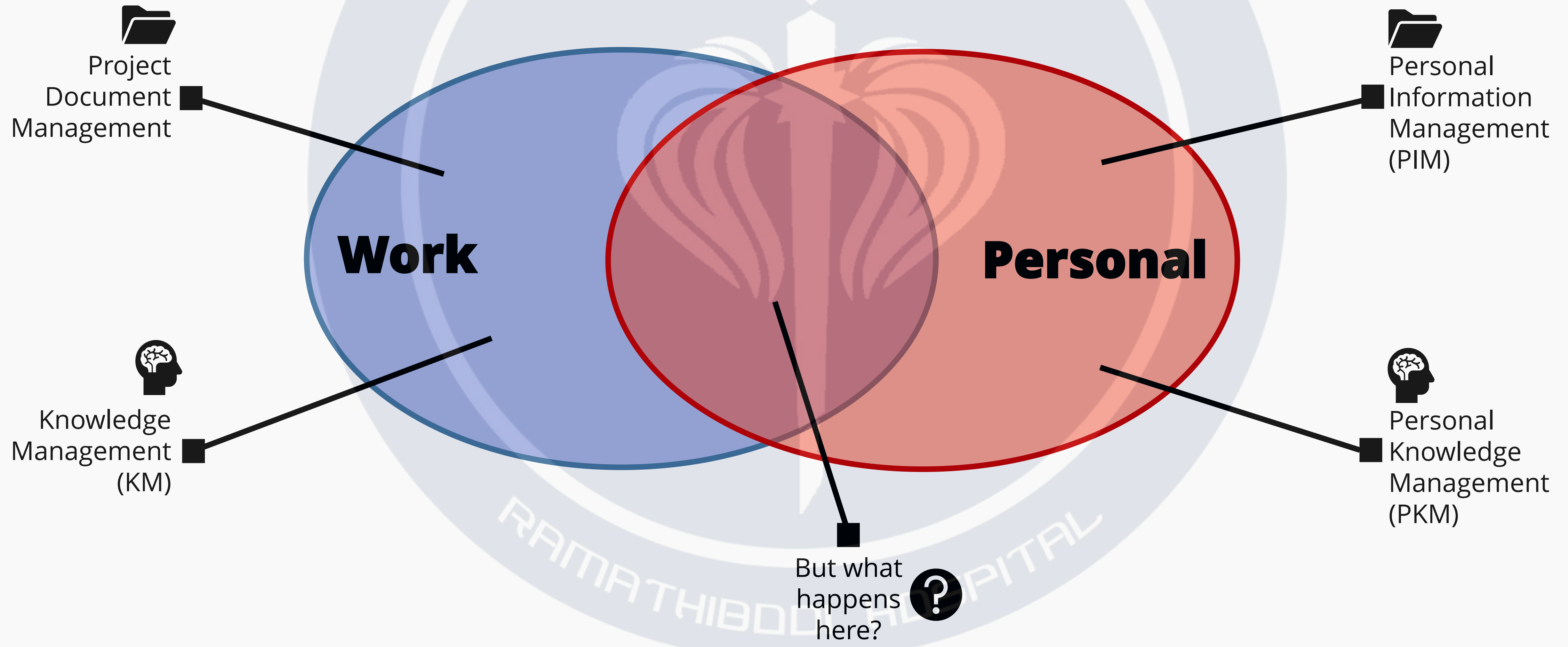
“I was up working until 2am again last night, Will!”

“I can’t remember what the client said to me. They should’ve sent it in an E-mail!”

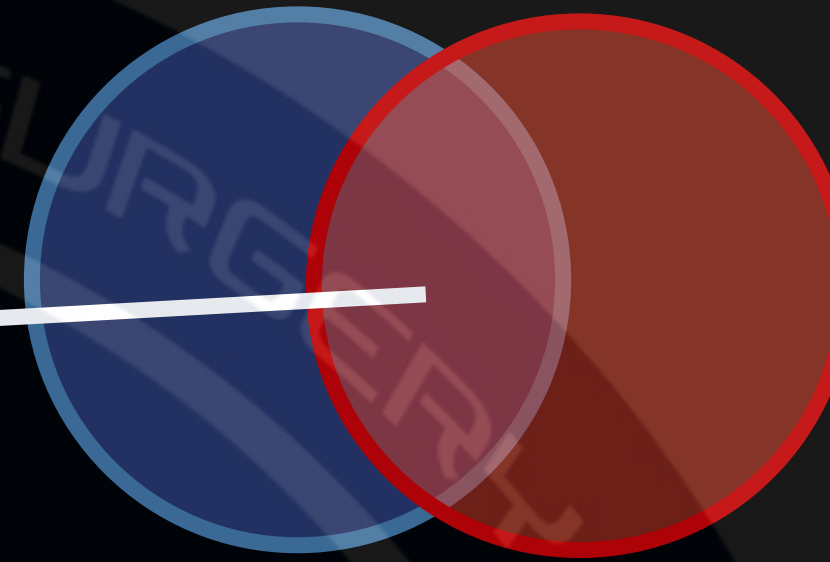
“What ticket are you talking about, Will? I’m doing something for Bob now!”

Work vs Personal Information Management

The art of getting things done through the use of people and information



“Personal” Work Information



Things I
need to do



Things I need
to watch and
monitor



Thoughts that I
have



Things I need
to know and
remember

Actions

**Highly
Actionable**

Knowledge

**Least
Actionable**

The Fallible Human Brain



Remembering things! ■

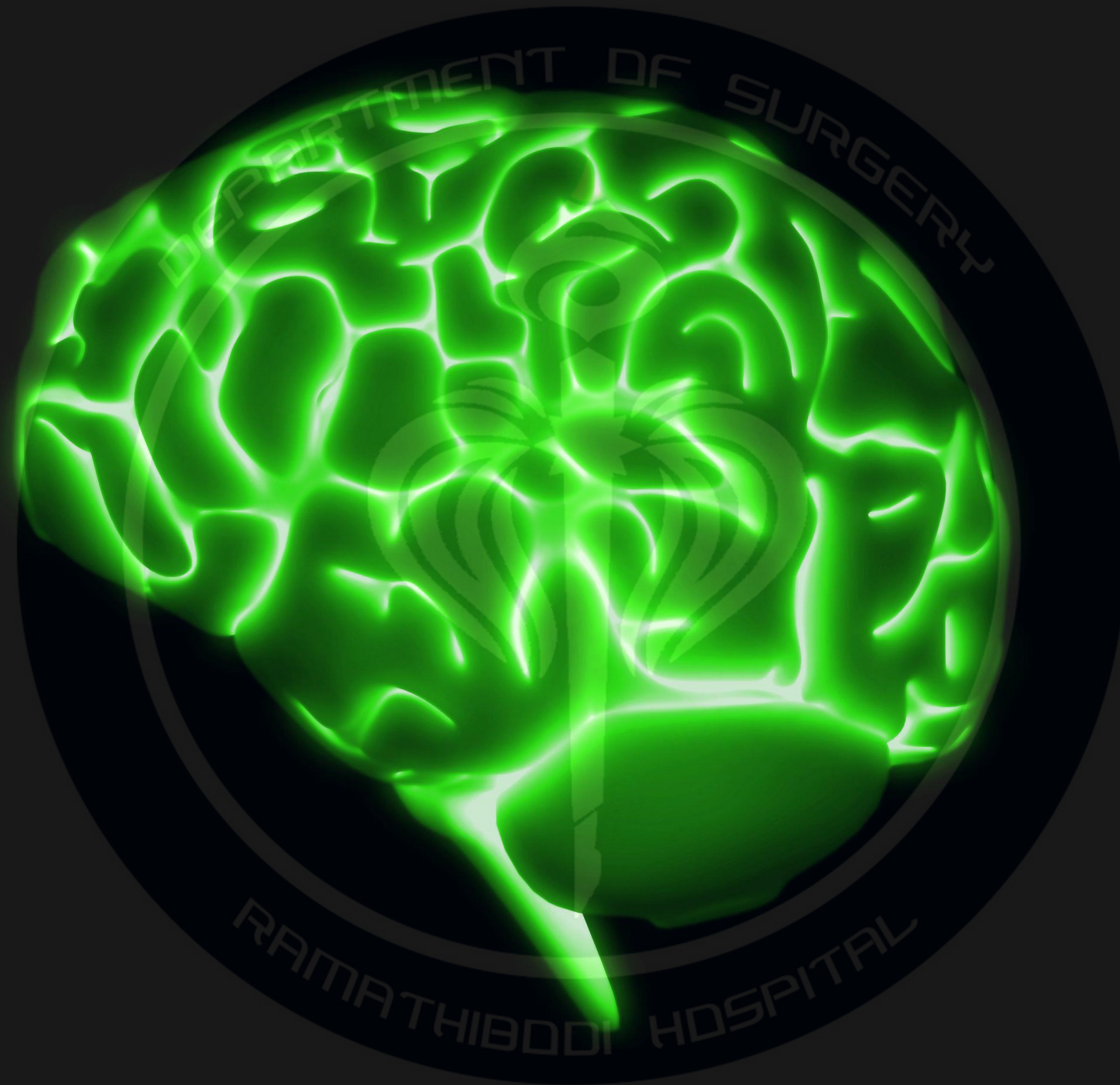


- Thinking
- Being creative
- Solving problems
- Noticing patterns

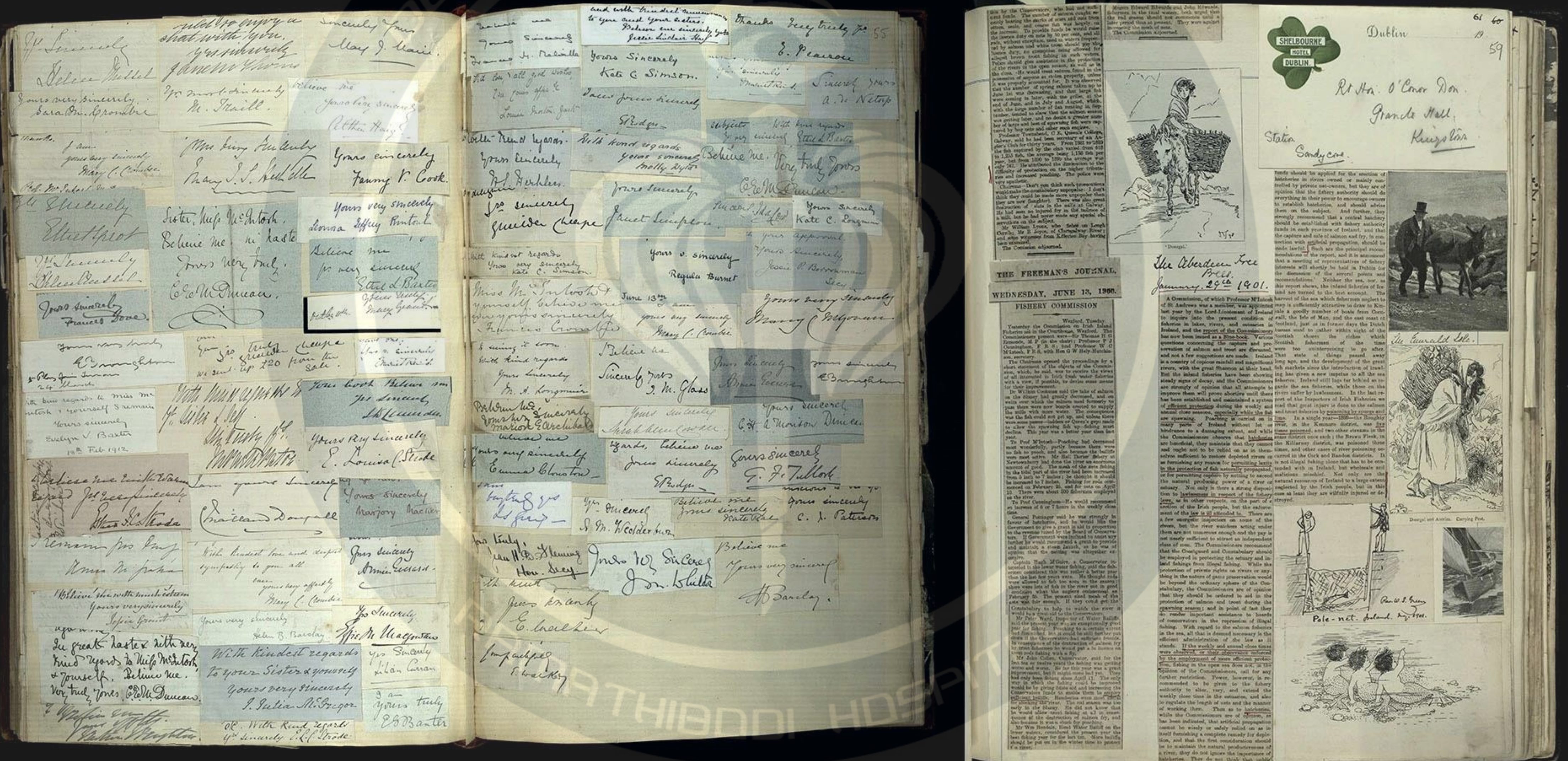


*Free up your brain to focus on
what it's good at!*

เปิดพื้นที่ให้สมองได้ทำในสิ่งที่มัน
ถูกสร้างมาให้ทำ

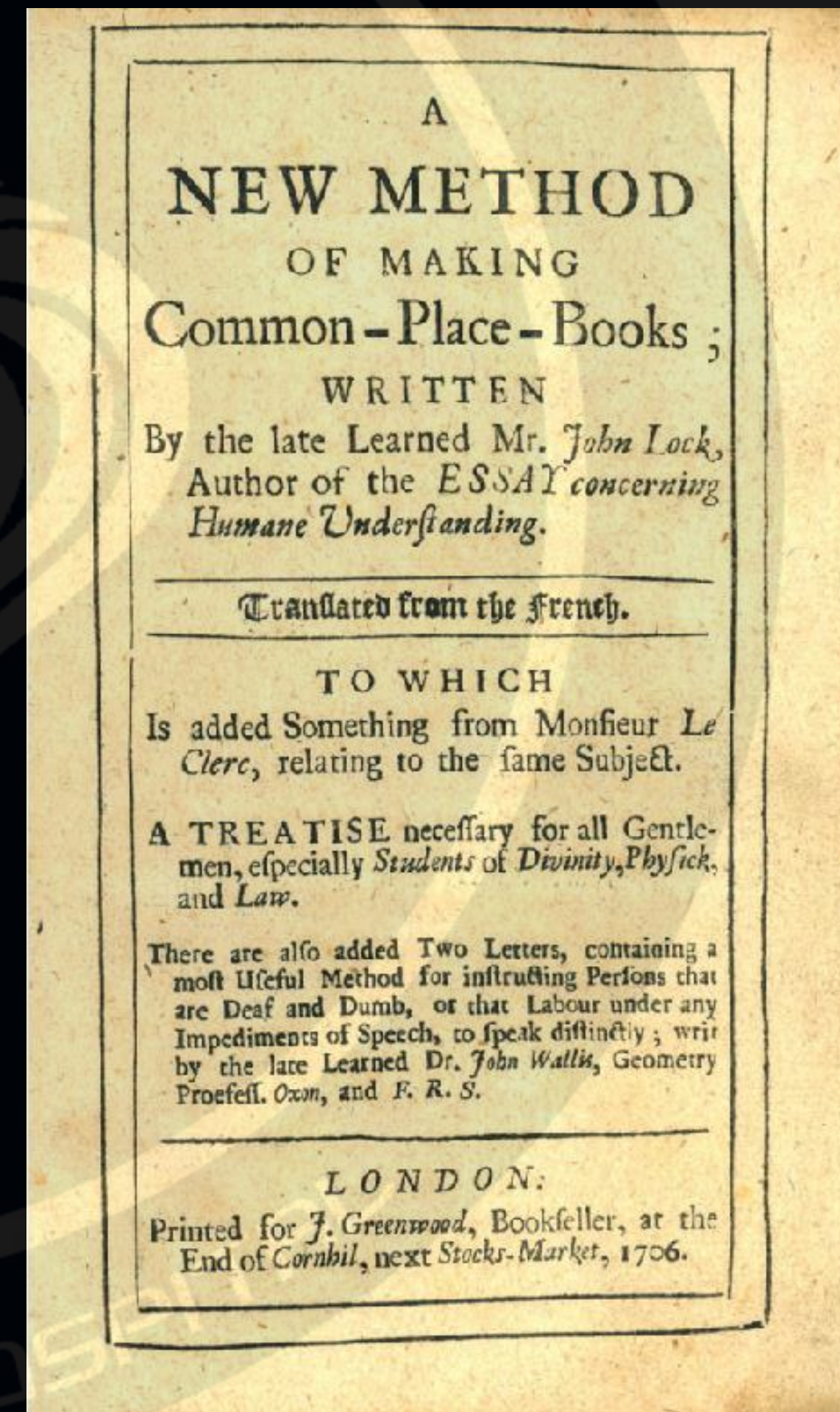
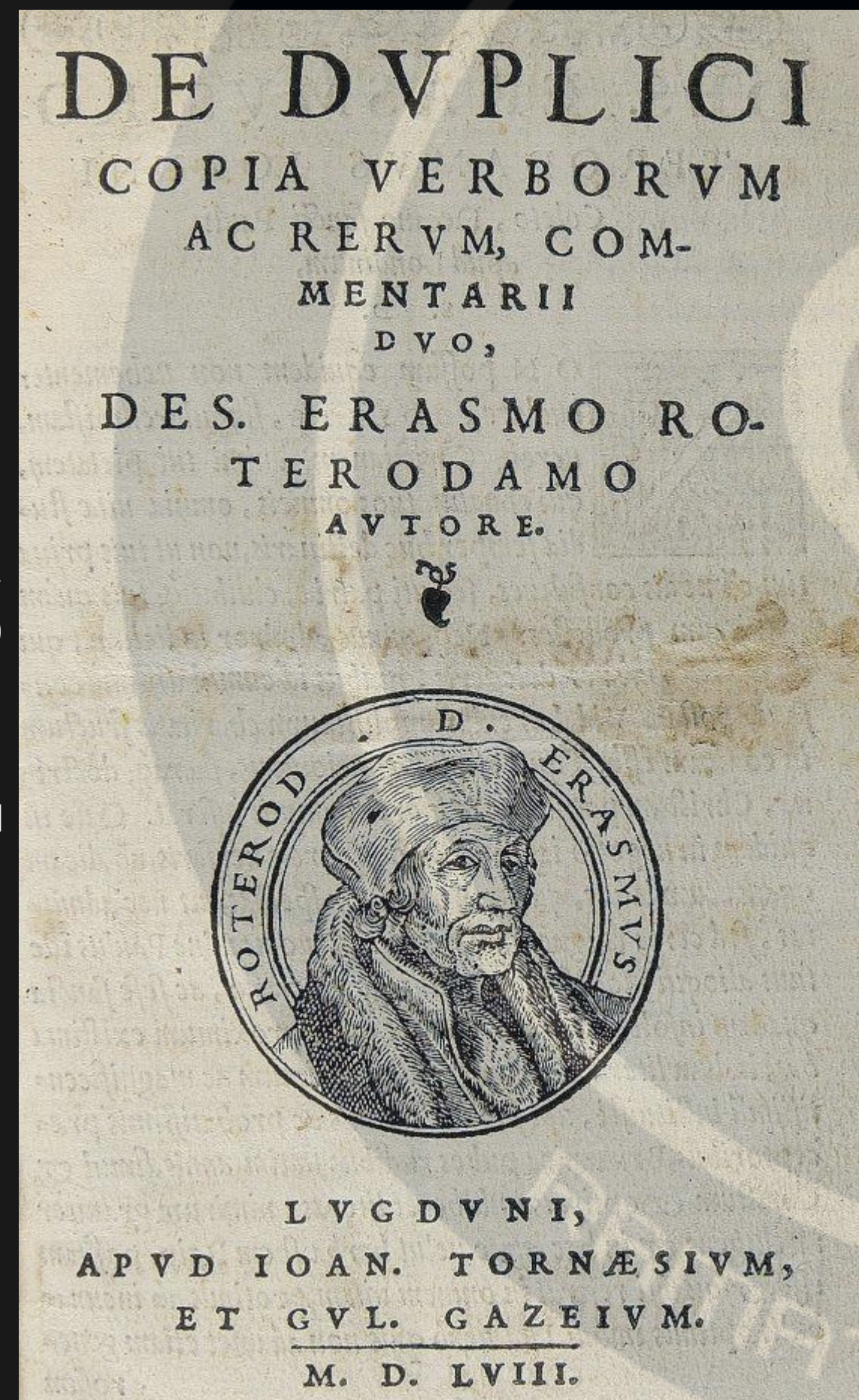


PIM History: The Commonplace Book



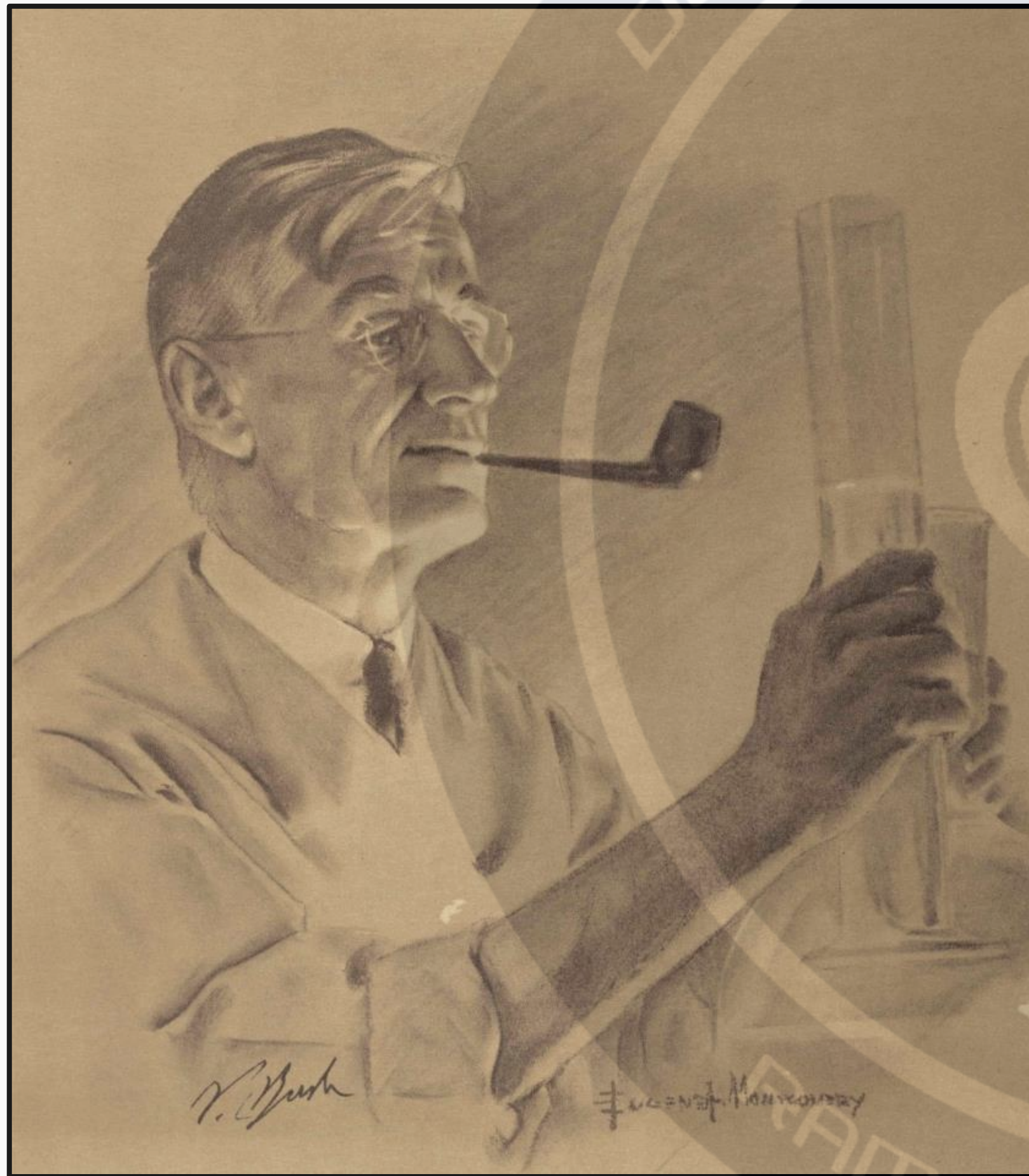
PIM History: The Commonplace Book

Erasmus
AD 1512



John
Locke
AD 1690

PIM History: Dr Vannevar Bush



Vannevar Bush (1890–1974)

“He has built a civilization **so complex** that he needs to **mechanize his records** more fully if he is to push his experiment to its logical conclusion and not merely become **bogged down** part way there by **overtaxing his limited memory**. His excursions may be more **enjoyable** if he can reacquire the privilege of **forgetting the manifold things he does not need to have immediately at hand**, with some assurance that he can find them again if they prove important.”

From “As We May Think”, 1945

PIM History: The Memex Machine



“Consider a future device for individual use, which is a sort of **mechanised private file and library**. It needs a name, and, to coin one at random, "memex" will do.

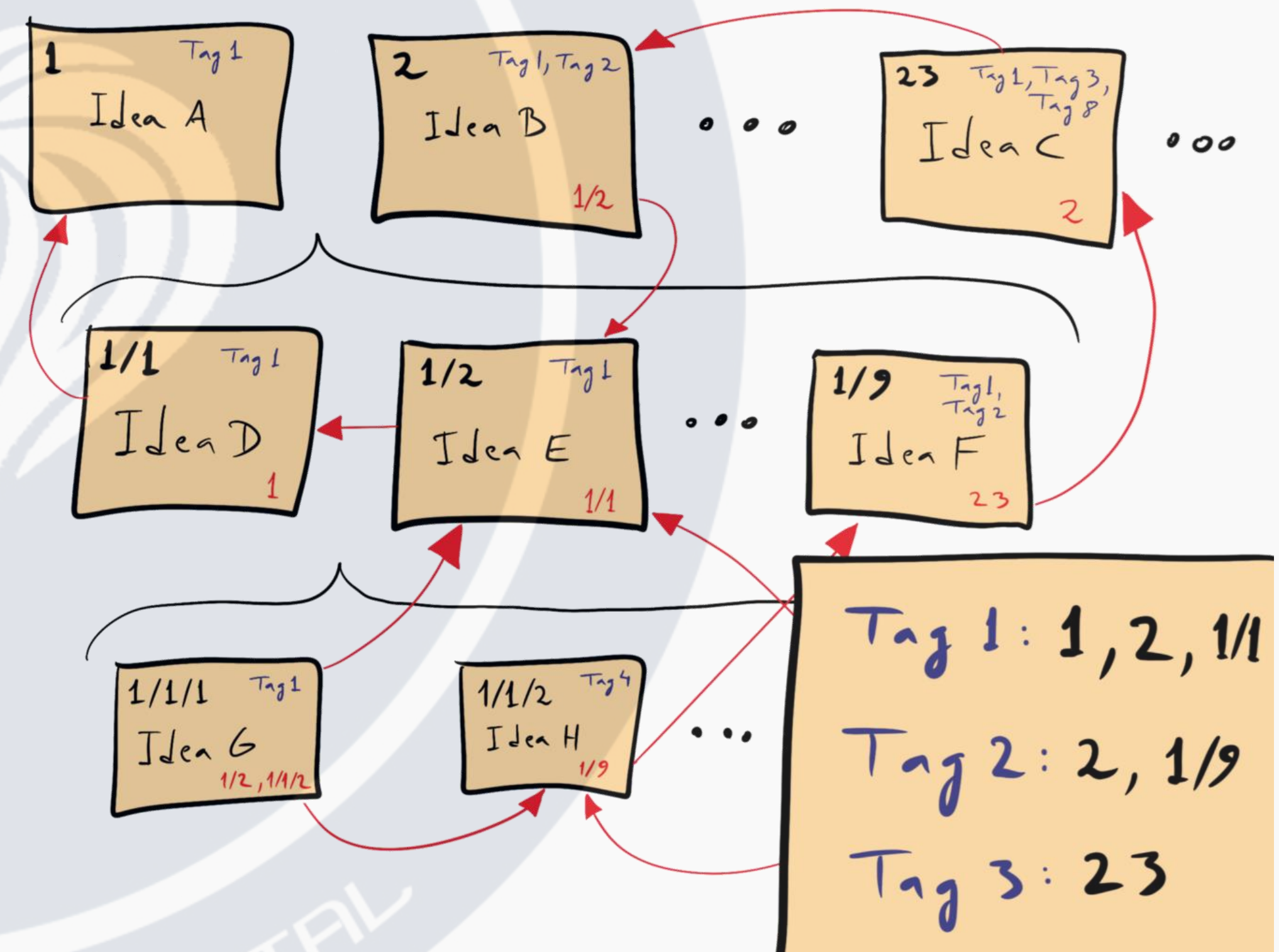
A memex is a device in which an individual stores all his books, records and communications, and which is mechanised so that it may be consulted with **exceeding speed** and flexibility It is an enlarged intimate **supplement to his memory**”

From “As We May Think”, 1945

Zettelkasten

A system for organizing
knowledge and taking notes

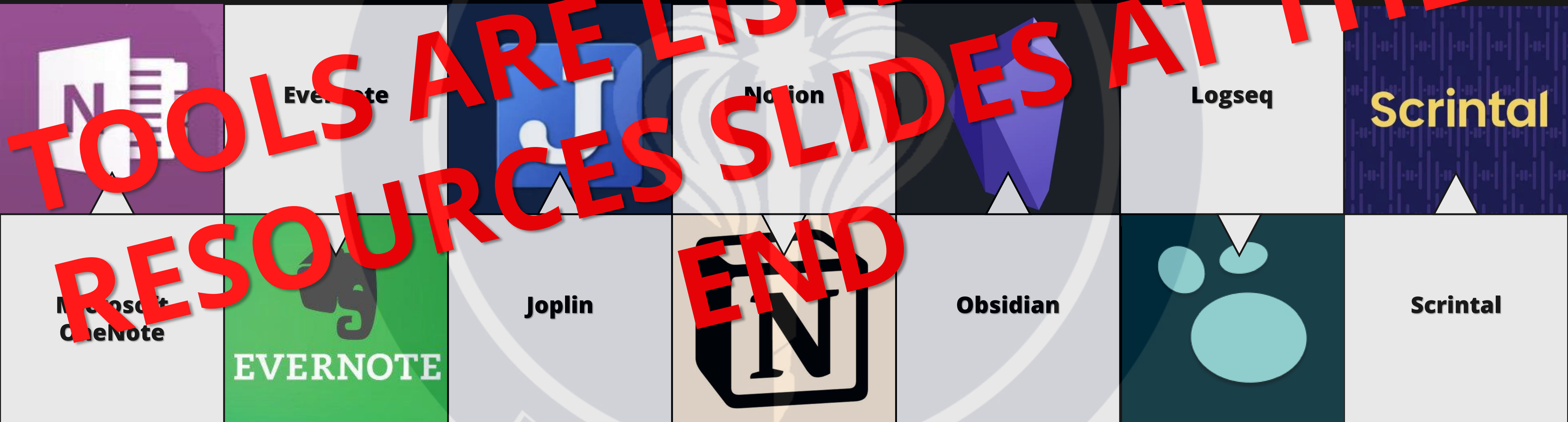
Niklas Luhmann
1927-1998



The “Tool”

The “System”

Modern Tools



...but these are not 'systems'

Building Blocks of a System

1 Methods of organising information



Folders



Tags



Links

2 Rules around the how/what information to capture



3 Processes to effectively manage information



Demo...



Folders



Tags

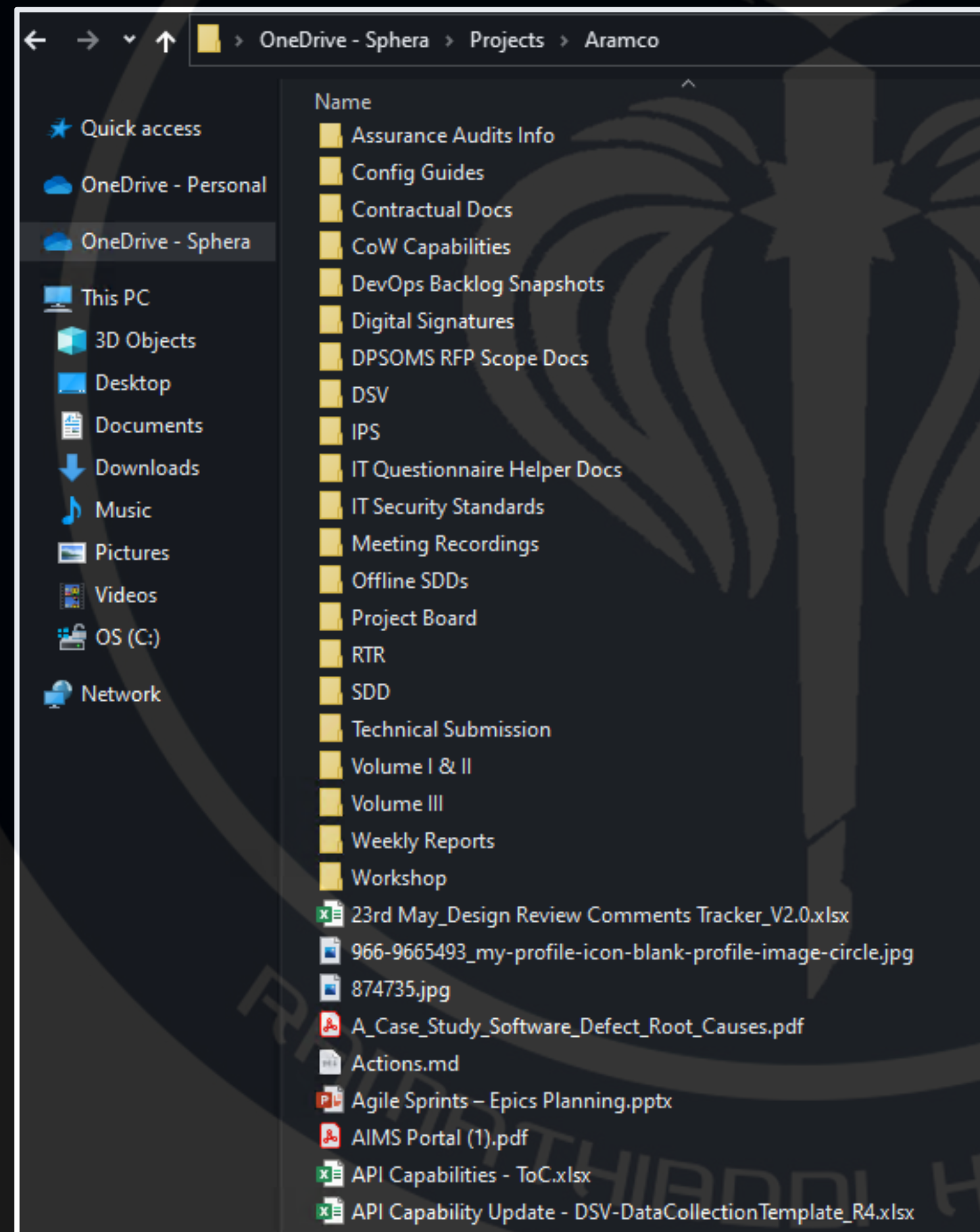


Links

Building Blocks of a System



Folders

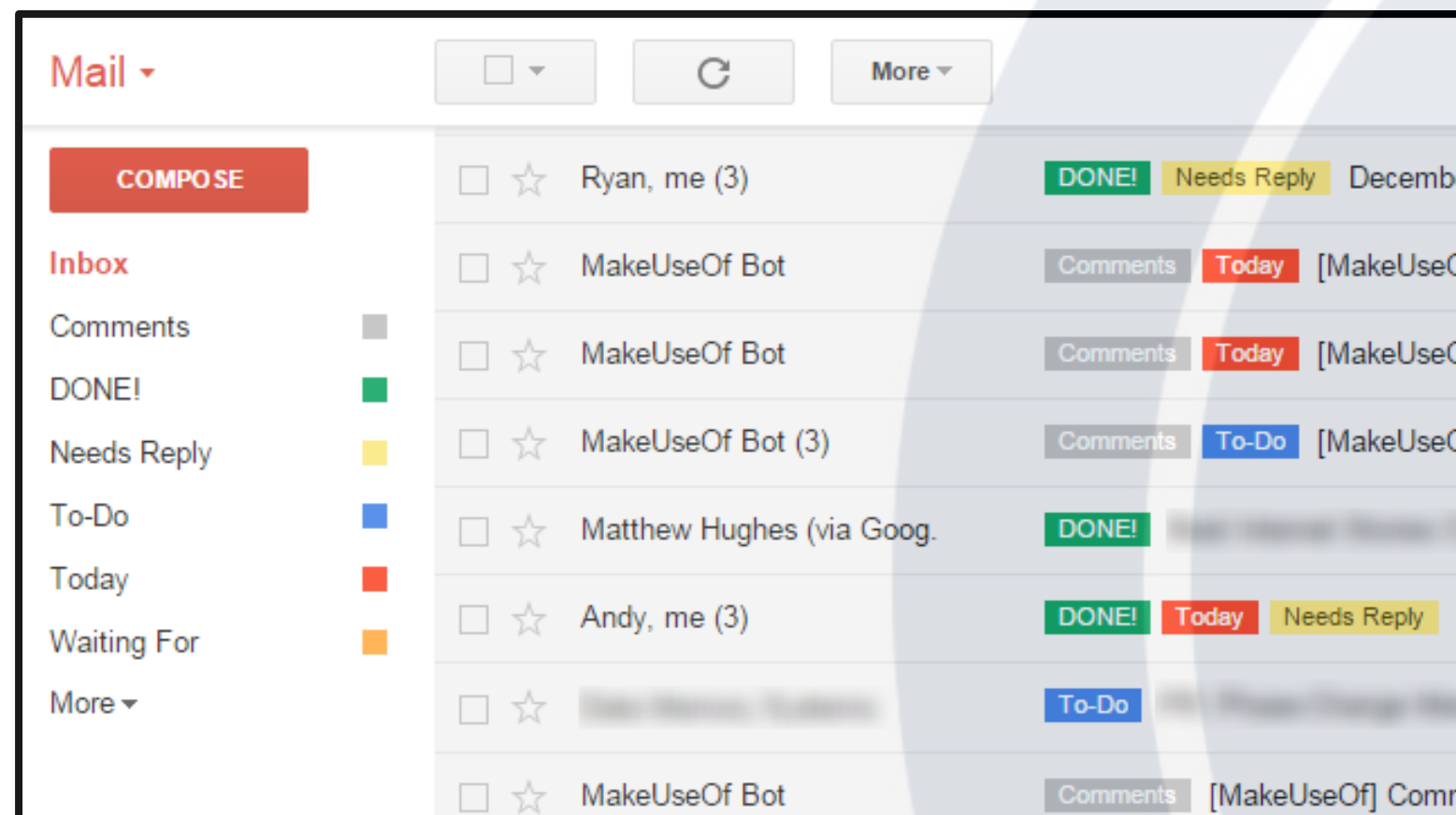


- 👍 Feels like real life – humans like physically placing things
- 👍 ‘Divide-and-conquer’ – good at decomposing a project or category
- 👍 You can learn a lot just from looking at the hierarchy
- 👍 ‘Top-down’ and ‘bottom-up’ methodologies
- 👎 “Out of sight, out of mind”
- 👎 Information can only go into *one* folder
- 👎 The decision to pick the correct folder requires cognitive effort and commitment
- 👎 Needs careful maintenance lest chaos ensues

Building Blocks of a System



Tags (labels)



- bank
- finance
- insurance
- todo
- to-do
- medical
- health
- optician
- thailand
- visa
- immigration
- recipe
- recipes



No longer have the frustration of trying to decide on a single folder



Tags can be combined – e.g., ‘quick’ and ‘Indian’ recipes. Great for queries!



Don't have to remember where you saved something, i.e., which folder it is in



Inconsistencies create chaos (plural, underscore, word type etc)



You need to remember what your tags are or create a lexicon



Higher burden to create a new note – if you don't decide on tags, you won't find it

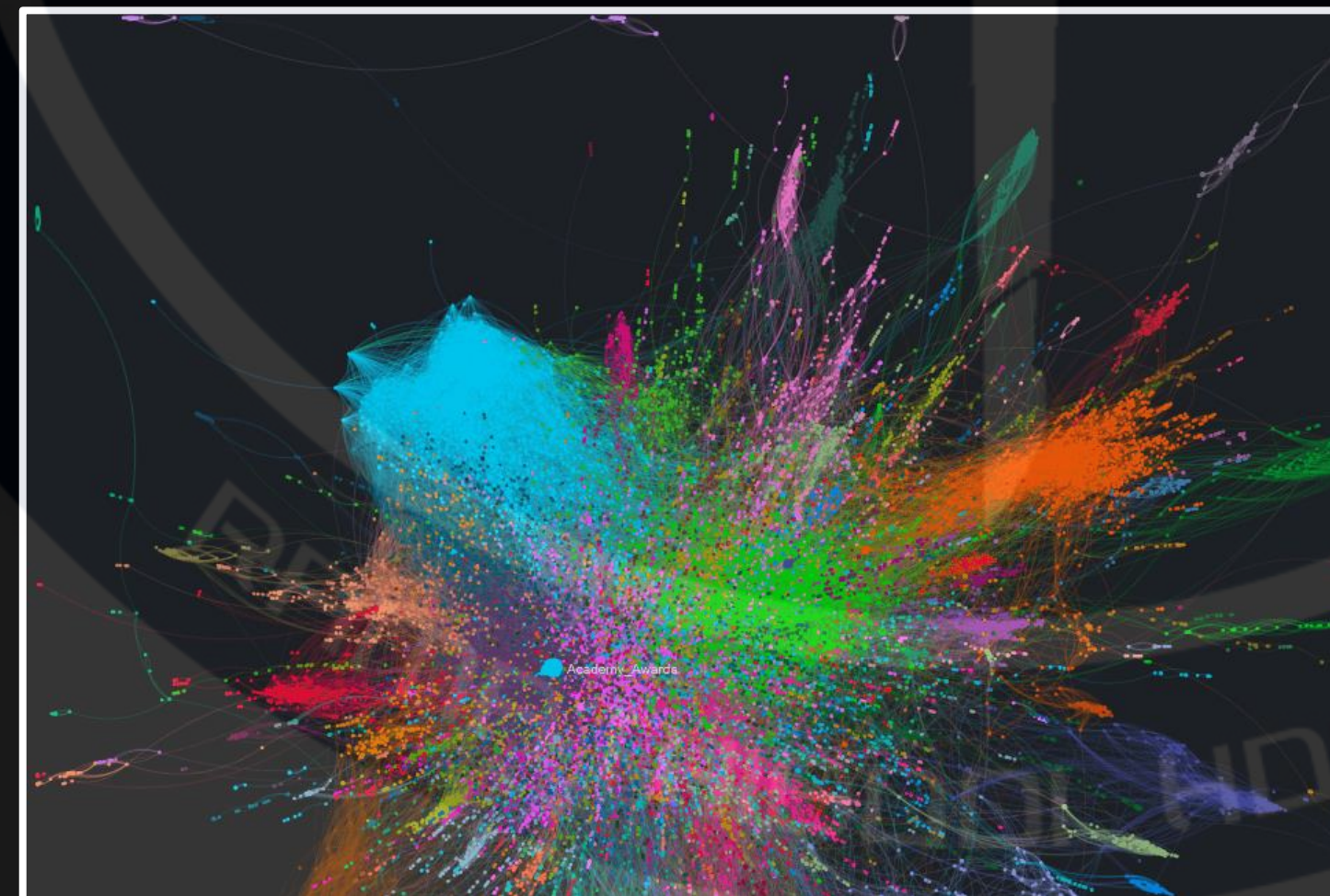
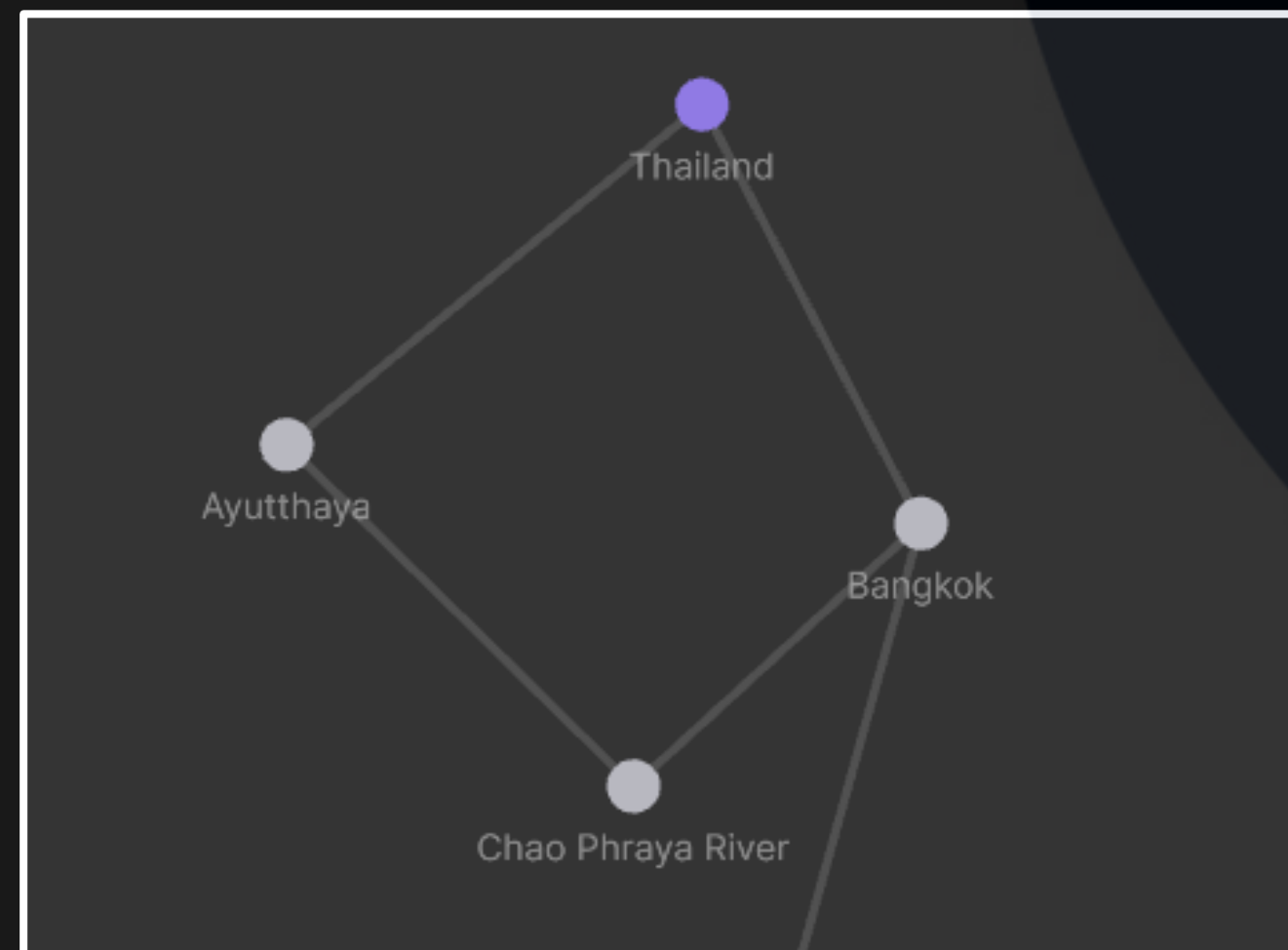
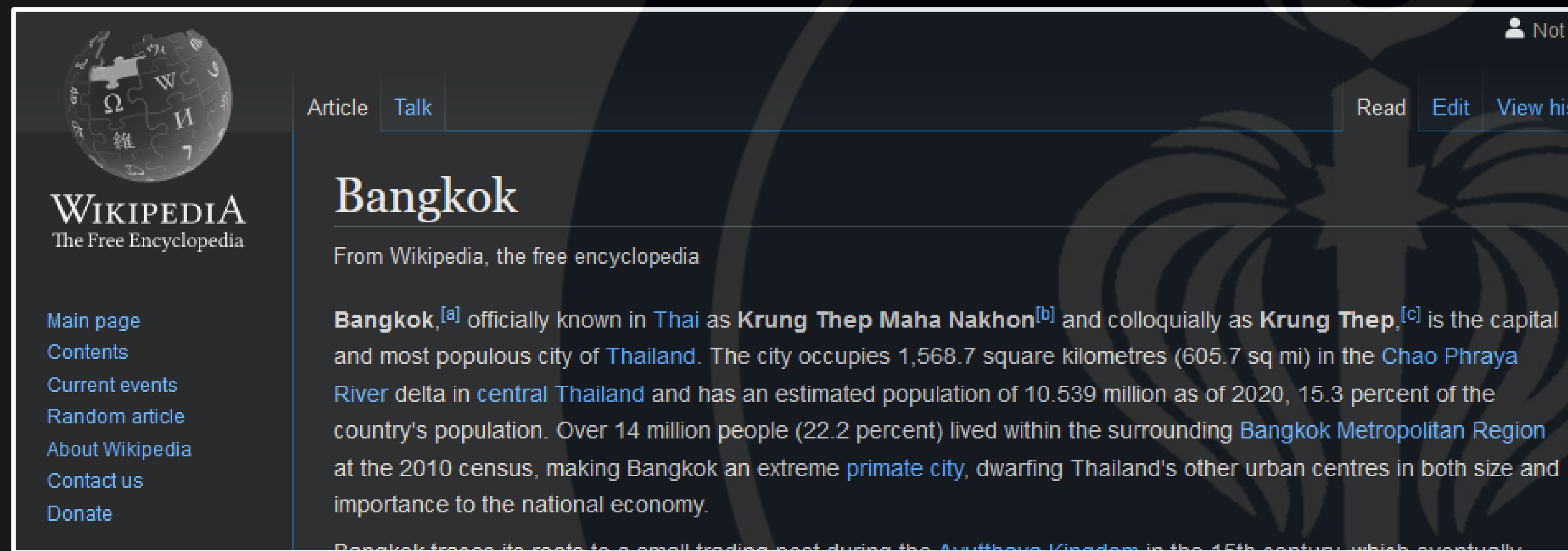


Easy to create duplicates by mistake, e.g., “condo”, “Condo”, “condo_stuff”

Building Blocks of a System

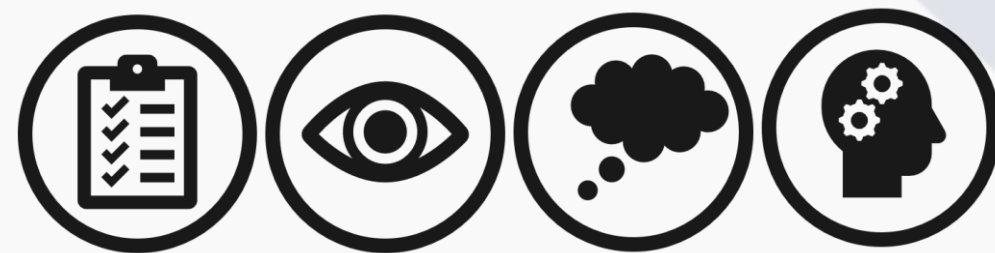
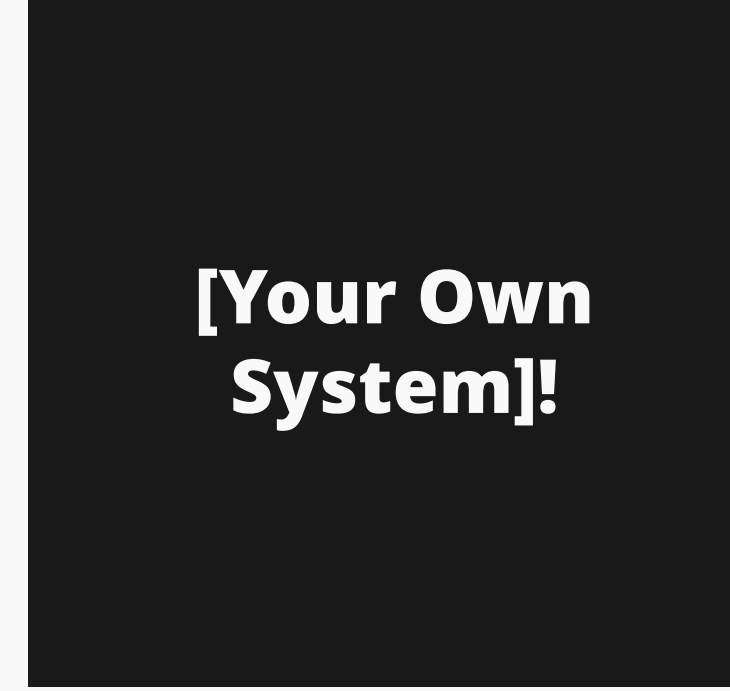
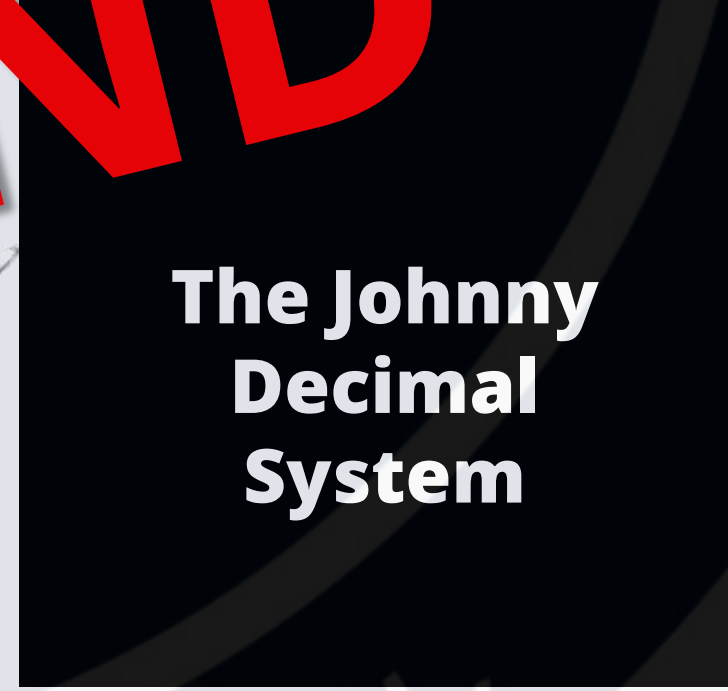
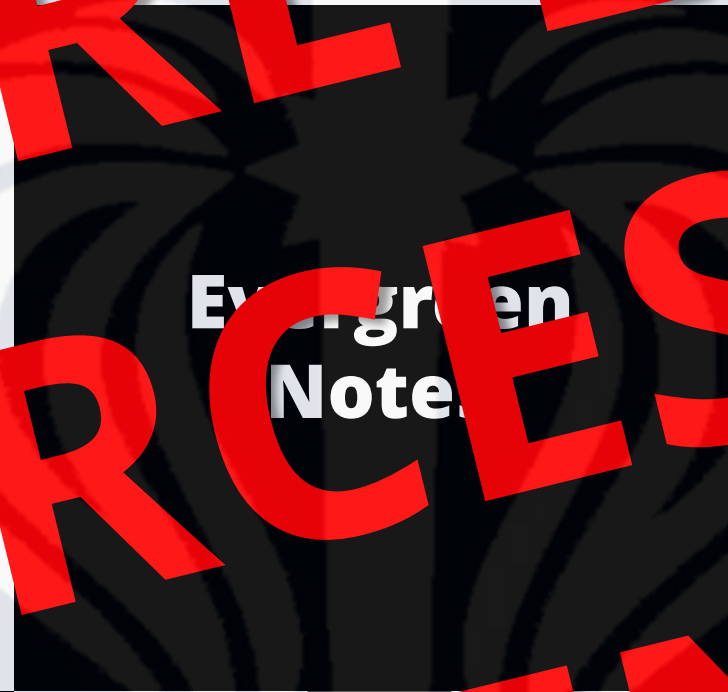
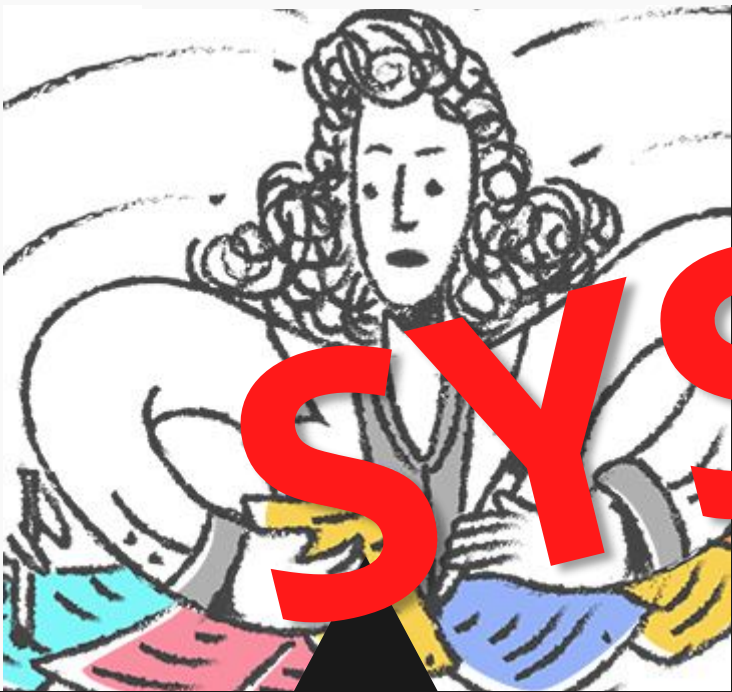
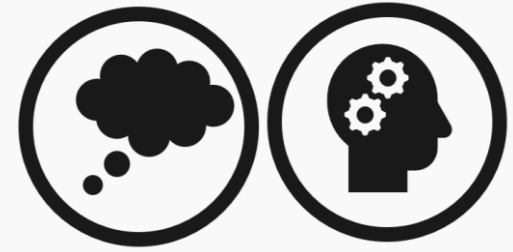


Links



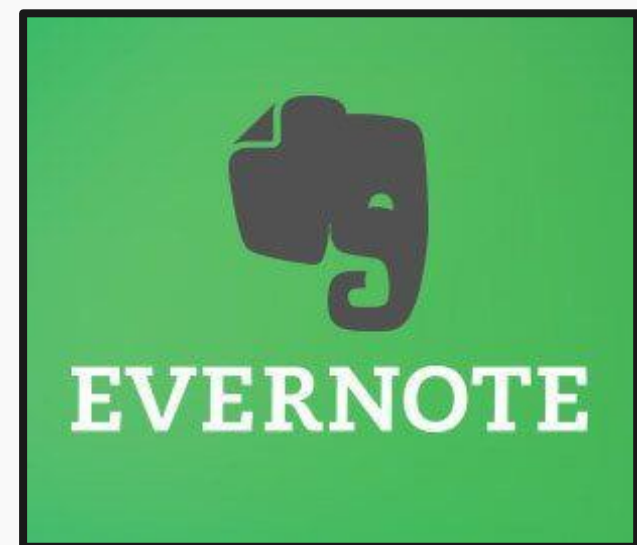
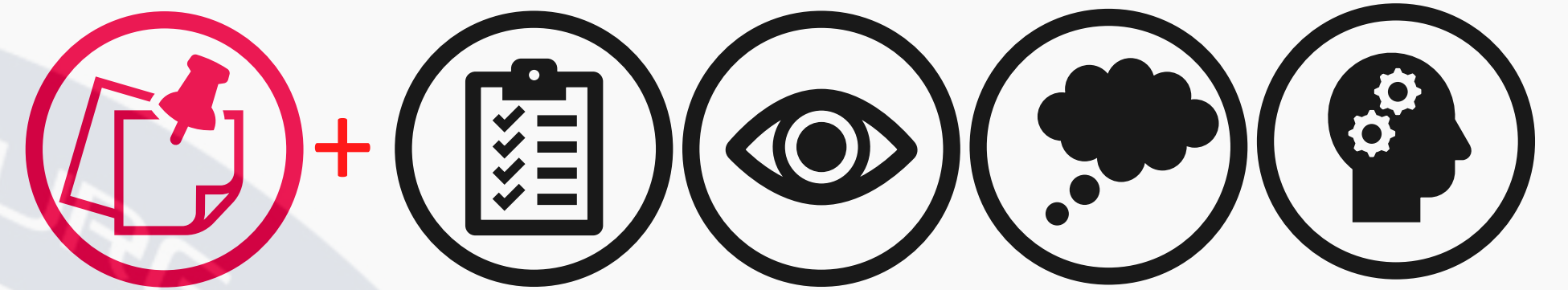
- 👍 Mimics the natural way your brain works
- 👍 Excellent for re-discovering notes and ideas
- 👍 Friction-free – you can even link to non-existent notes
- 👍 Enables amazing visualisations of your notes to aid in sense-making
- 👍 Enables dynamically embedding notes
- 👍 You are already used to them if you use the Internet
- 👎 Visualisations are still in their infancy, but are growing fast
- 👎 You need to get into the habit of linking as you write
- 👎 The power only really explodes once you incorporate some systems and tricks

PIM Pre-Built Systems

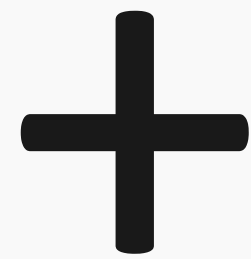


**SYSTEMS ARE LISTED ON
SLIDES AT
THE END
THE RESOURCES**

Designing Your PIM System



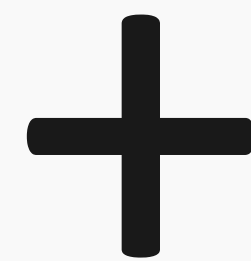
Tool



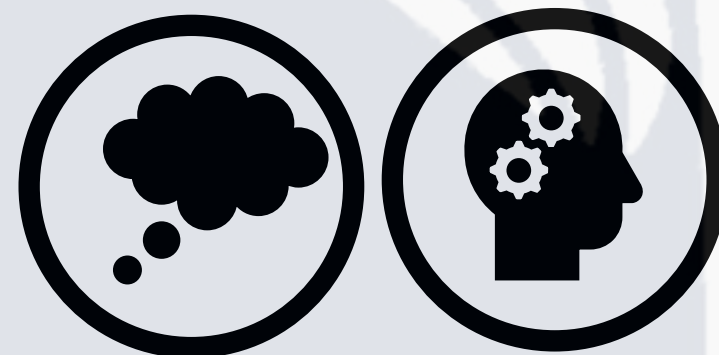
System



Tool



System



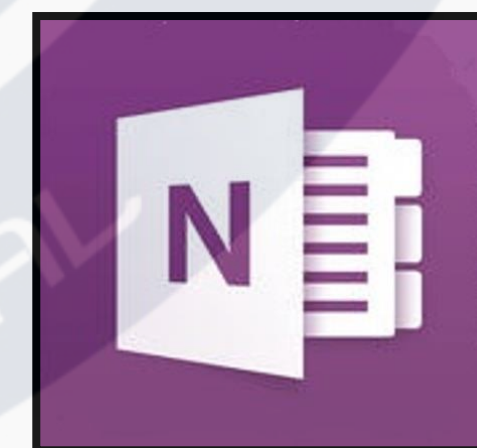
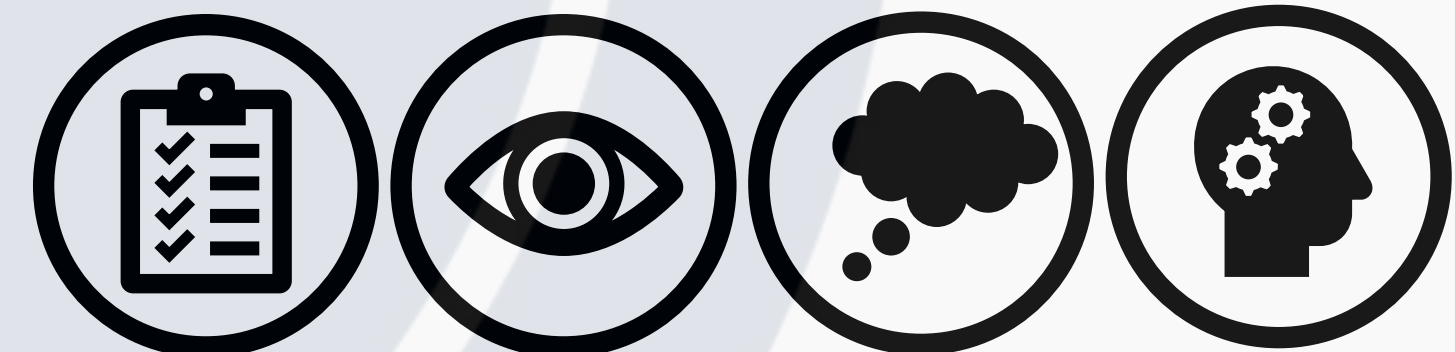
Fleeting Notes



Tool

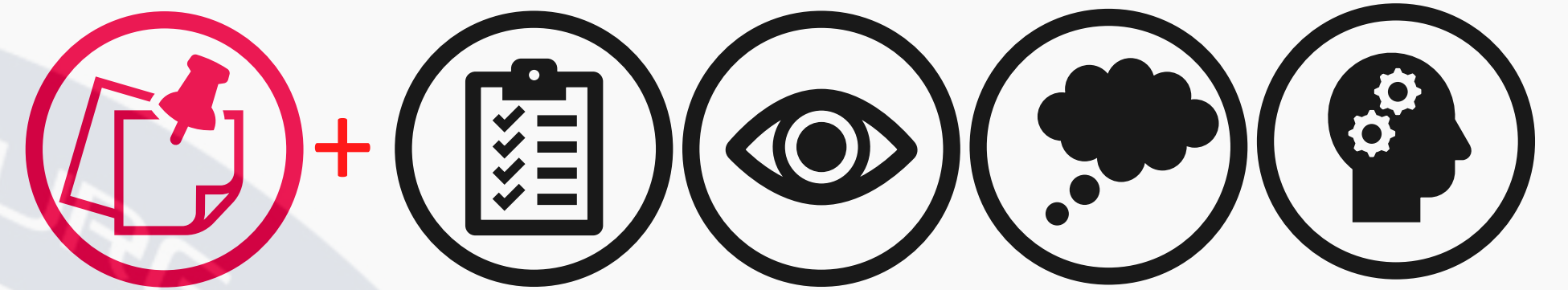


System



Fleeting Notes

Designing Your PIM System



- What do I do if I need to capture something quickly, e.g., an idea?
- Do I have a note taking process, e.g., do I take quick scribble notes, turn them into permanent notes, and routinely clean and archive my notes?
- What do I do if I find something interesting and want to keep it?
 - How do I leverage these interesting things I learn?
- How do I make sure I learn from what just happened, so it doesn't happen again?
- What do I do if I have come across some information that I think will be important later?
- How do I remember I if I need to do this tomorrow / next week / next month?
- How will I quickly see what's important to me right now?
- How can I make sure I'm building my knowledge on my project's domain?
- How can I see things I should be checking in on?

| Getting Started

- Pick a tool (see tool selection slide at the end)
 - Have somewhere to grab fleeting notes
 - Have somewhere to save permanent notes (the 4 types)
- To get started, use a basic system with the folders shown on the next slide in your tool of choice (this is just a starting suggestion!)
- Duplicate these folders in your E-mail client, e.g., Outlook
- If you have notes already, don't be afraid of a "fresh start" – move old notes into "Archive" and take them out as you need them
- Use a basic process for a note:
 - Take fleeting notes when away from your computer
 - Process them into *real* notes within 48 hours
 - Tag your notes #action, #meeting, #knowledge, #issue, etc, to keep on track of what they are
- Over time, augment your workflow with better tools, plug-ins, automation, and tricks from other systems
- Be curious! Look up your tool on YouTube and see what others are doing with it

Space to “think out loud” at your computer. When you have thoughts and ideas, get them out of your head and grapple with them. Sometimes, when you read your own idea back to yourself, you realise you disagree with your own idea!

Anything that is ready for you to take action on. Small action items can be a single note. Larger action items can be a folder, i.e., a mini project. Everything pertaining to that mini project goes in that folder. Make sure you define a “next action” for large actions (see the GTD system). Things move to “Wait” or “Archive” when you have done your action.

When you have an action item where you’ve done all you can for now, and you need to wait for someone else to do something, or for someone else to happen. It’s off your desk for now.

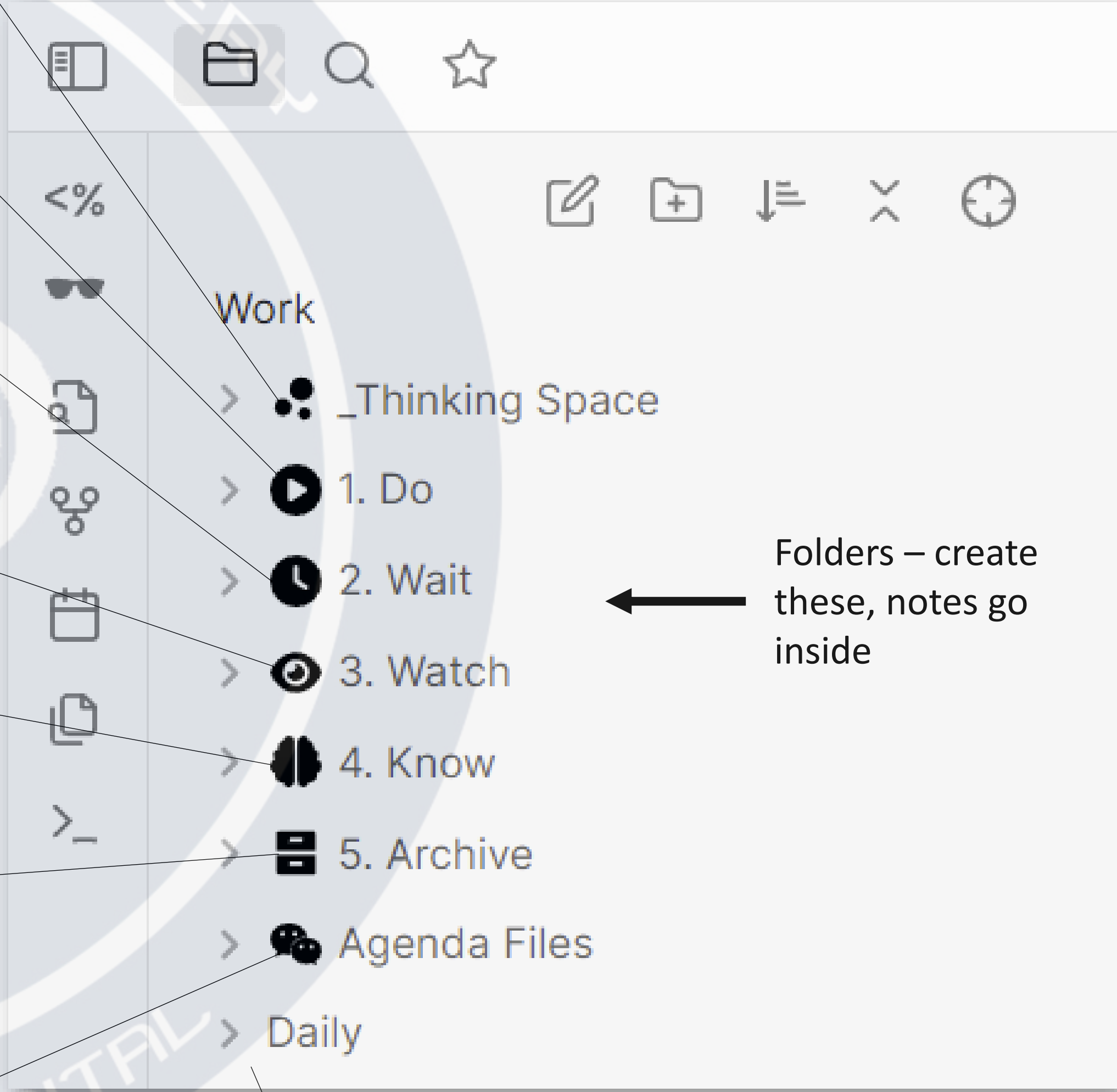
When you have an issue or risk that lies dormant for now, or a longer running mini-project you have given to someone else and you want to remember to check in on it later... it goes here.

This is where you store knowledge – notes about things you need to understand for your project. Domain specific things. Sometimes project management techniques. Notes about individual people you need to interact with. Facts.

When a note is no longer immediately useful, you can store it in the Archive. This doesn’t meant it’s useless. In fact, all the actions and meetings you’ve had will be in here. They just don’t need to be cluttering up the rest of your notes anymore. You can still find them via tags and linking.

Have a single note file for each important person you interact with in your project, e.g., “Bob Charles Agenda”. Every time you think of something you need to remember to discuss with Bob Charles, or tell him, add it his Agenda File. When you next meet with Bob, you’ll have your complete agenda ready for him!

This tool is Obsidian, but every tool (perhaps except OneNote) has the ability to create the equivalent of folders/containers such as these



← Folders – create these, notes go inside

Optional: Some tools let you keep a daily note as a kind of journal and re-orienting place. If you like this idea, you could have this too.

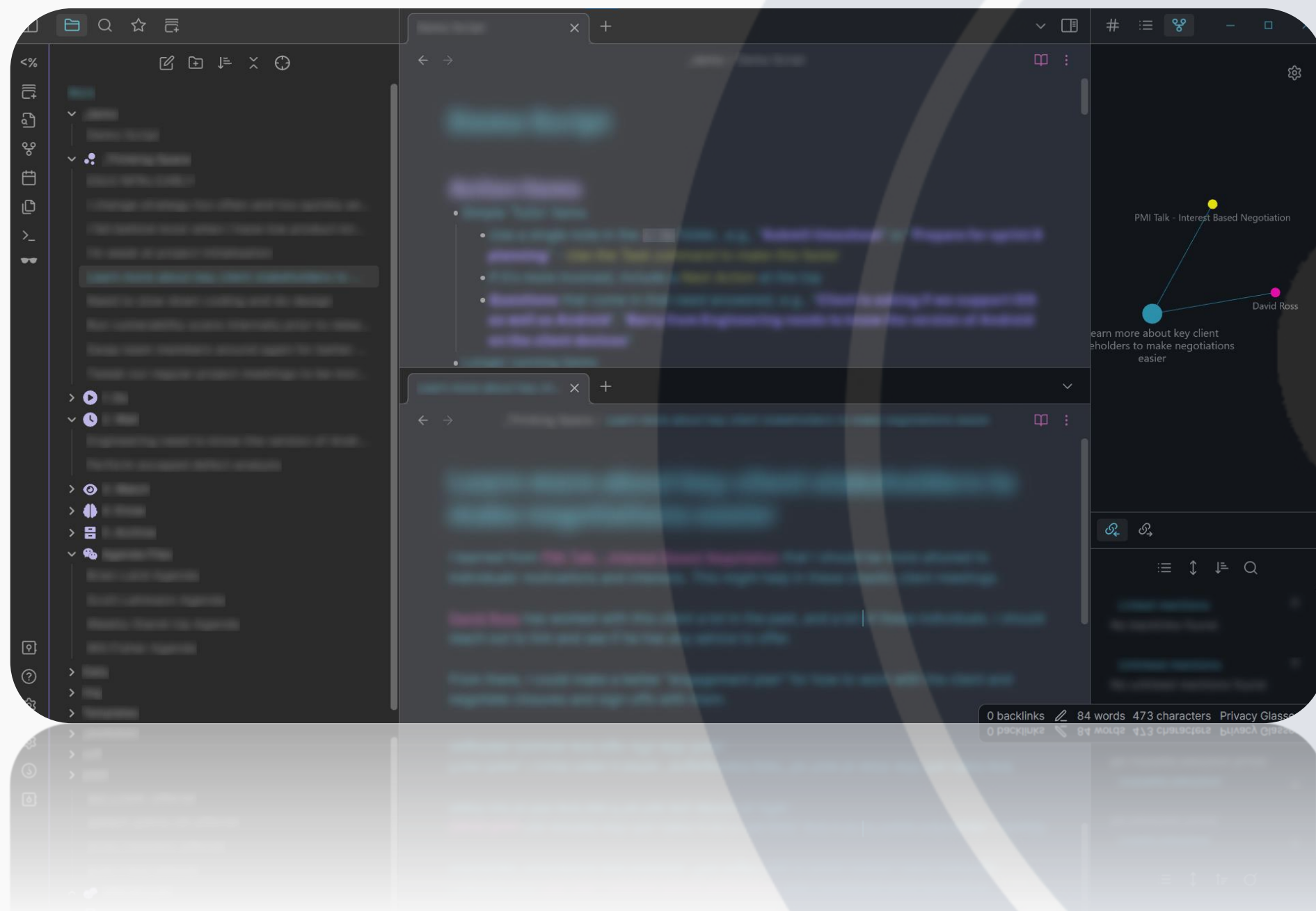
Getting Started (cont)

- If you use a tool capable of linking (e.g., Obsidian) and want to get started:
 - Every time you write a note, try to link it to at least *one* other note
 - Think, *What other note does this note remind me of?* and link it
 - The power will soon become clear, and you will develop the habit to link your notes deeply
 - Keep your notes as *atomic* as possible – they should be about *one* thing, concept, idea
- Write for *yourself* – your future self is the audience!
- Write notes for the sake of thinking and reflection.
 - "We do not learn from an experience... We learn from reflecting on an experience"
John Dewey
 - Be a note **maker**, not a note **taker**; engage with topics through notes

| My System



Resources - My System



- My system is an extension to what you see on slide 27 – I have the same folder structure, which is influenced from the PARA system.
- I borrow ideas from “Getting Things Done” to handle action-oriented notes, e.g., having a “next action” defined for longer running tasks / mini-projects.
- I often create notes based on my own thoughts, borrowing from “Linking Your Thinking” and “Evergreen Notes”
- I write short, atomic notes on concepts I’m trying to learn, breaking them down as small as possible, as per “Evergreen Notes”
- I use Obsidian’s “QuickAdd” plugin to speed up capturing things like “I need to remember to tell person X about this”, or quickly make a task
- I colour my Obsidian graph so that different kinds of nodes have a different colour, e.g., #people are pink and #issue is red. This helps when looking at the local graph and see what is linked to the note I’m in.
- I use “Icon Folder” and “Folder Note” plugins to make the folders look better and enhance their functionality.
- I use a keyboard shortcut to quickly move a note between my P.A.R.A style folders, so I can do Ctrl+Shift+V then 1, 2, 3, etc to move it in only a couple of keystrokes.

Resources – List of Tools

comparison table on next slides

Name	Cloud (stored on someone else’s computer) Local (stored on your computer)	Note Type	Proprietary Format	Mobile App	Notes
OneNote	Both (via OneDrive)	Rich text + rich embedding	Yes – notes are stuck in here	Yes, and quite good	Not good for implementing some of the systems in this presentation. You are constraint in working within OneNote’s “ring binder” method. The interface is familiar to those who use Microsoft Office.
Evernote	Cloud	Rich text + rich embedding	Yes – export options aren’t great (export to HTML)	Yes, and quite good	Ongoing subscription cost. Free version quite limited. Folder capability is quite constraining – you can only go 2 deep. Designed to be easy to use, but the interface is becoming very bloated in recent years. Privacy concerns. Recommended for absolute beginners to digital notetaking.
Notion	Cloud	Plain text (almost)	Yes – export options aren’t that great (PDF, HTML)	Yes	Ongoing cost. I haven’t used it, but many authors of some famous systems swear by this tool. Powerful “block” system for organsing note content. Can crate dashboards of information. Notes are stuck on their servers. Privacy concerns.
Joplin	Local (option to sync using your own cloud solution)	Plain text (markdown)	No – notes can be freely opened in any other ‘Plain text’ tool	Yes – it’s polished but has one or two missing features compared to the desktop	Free alternative to Evernote. Open source. Excellent for implementing basic systems that use folders and tags. Plain text note-taking removes distractions and focuses on the note content. Interface is clean and simple. Eventually requires learning basic markdown to get the most out of it (see next slides). Cloud sync must be set up yourself in the options but is easy and works well. Notes are encrypted at rest. No privacy concerns.
Obsidian	Local (option to sync using Obsidian’s servers, or set up your own cloud solution)	Plain text (markdown)	No – notes can be freely opened in any other ‘Plain text’ tool	Yes – it has improved a lot, but very constraining to use compared to the comfort of a laptop /desktop	Free for personal use. Very cheap license cost to use commercially. Extremely basic or extremely complex – your choice! Add plug-ins to extend functionality as you grow with the tool to help you implement systems. Pushes hard on linking as a means of organising notes, but folders and tags are available too. No privacy concerns – your notes are yours, on your computer. Recommended for those graduating to something beyond Evernote and want a personal knowledgebase with a lot more power Try tutorials on YouTube to get started! https://www.youtube.com/watch?v=OUrOfIqvGS4

Name	Cloud (stored on someone else’s computer) Local (stored on your computer)	Note Type	Proprietary Format	Mobile App	Notes
LogSeq	Local (you could sync using your own cloud solution if you wanted)	Plain text (markdown) <i>Forces bullet points – i.e., it’s an “outliner” tool</i>	No – notes can be freely opened in any other ‘Plain text’ tool	Not yet, but it’s coming	Free and open source. Very similar to Obsidian and is very extensible. More “action oriented” than Obsidian with tools to implement “todo” workflows out of the box. Opens a fresh journal page every day. Supports linking like Obsidian. Requires deeper computer skills to use to its fullest extent.
Roam Research	Cloud	Plain text (markdown) <i>Forces bullet points – i.e., it’s an “outliner” tool</i>	No – notes can be freely opened in any other ‘Plain text’ tool But you need to export them first	You can use the website version on your phone	It’s basically LogSeq, but web-only, and very expensive. Your notes are stored on their computers and not your own computer. Privacy concerns. I can’t find a reason to use this when LogSeq does the same thing.
Emacs + Org-Mode Org mode for Emacs	Local	Plain text	No – notes can be freely opened in any other ‘Plain text’ tool	No	Extreme level of complexity. A command line tool that has existed since 1976. It also has extreme levels of power and can do anything you can dream of – provided you have the computer skills to achieve it. The learning curve is extreme, and you can spend months learning how to use this tool. It is the most customizable tool on the list. Obsidian comes close to this level of power but without the learning curve.
iA Writer	Local	Plain text (markdown)	No – notes can be freely opened in any other ‘Plain text’ tool	Yes, and it’s great	Beautiful, simple, plain text markdown editor. Its selling point is its ability to make you “focus” – it can strip the screen down to absolutely nothing but the text, so you have zero distractions. Great if you need to do some longer form writing without losing focus. Quite pricy. My tool of choice for fleeting notes on mobile
Simplenote	Local/Cloud	Plain text (markdown)	No – notes can be freely opened in any other ‘Plain text’ tool	Yes, and it’s great	Very basic note taking tool that is very polished, and many swear by it. I haven’t used it, but I have to include it due to its popularity.
Dynalist	Cloud	Plain text (markdown) <i>Forces bullet points – i.e., it’s an “outliner” tool</i>	No – notes can be freely opened in any other ‘Plain text’ tool But you need to export them first	Yes, and it’s great	Excellent basic outliner tool for organising yourself with folders and bullet points. Made by the developers of Obsidian.
Personal Knowledge Management: อ.พญ.วฐ วาสนศิริ ฟาร์เกอร์สัน (13/09/66)					Slide 32/37

Resources – List of Tools

Notable Mentions

- **Turtl** – encrypted plain-text notes
- **Google Keep** – excellent for fleeting notes!
- **Windows Sticky Notes** – excellent for fleeting notes!
- **Apple Notes**
- **Bear**
- **Milanote**
- **Todoist**
- **Scrntal**
- **Samsung Notes**
- **Trello**
- **The Brain**
- **Thunk Notes**
- **Dropbox Paper**

Other notes to be aware of:

- **Plain text tools are excellent for a few reasons:**

- Your focus is on the NOTE CONTENT, not the STYLE of what is being presented.
- Your notes can be opened by almost anything, allowing you to change tool at any time.

- **Many tools are using 'markdown' as their note format.**

- This allows notes to be created very quickly without wasting time on distracting formatting.
- It allows you to separate concerns between *content* and *presentation* of your notes. Separation of concerns is good:
 - You write the *content* of your notes in plain text
 - You can change the way your note is *presented* at any time later without changing the content – usually presentation is a non-issue
- There is a very small learning curve to pick it up – YouTube has many tutorials, and I can cover it in the workshop, but this is a vital skill.

Resources – List of Systems

comparison table on next slides

Name	Basic Concept	Good For	Link	Notes
P.A.R.A	Use folders to organize notes + information based on actionability	Organising personal life	https://fortelabs.com/blog/para/	The best system for organising personal life that I’ve ever found. The concept of using folders to organize by actionability is very very powerful, and can be borrowed for project management systems too. Tiago Forte, the designer, also has a book called “Building a Second Brain”.
Zettelkasten	Create small notes with single ideas or concepts, and link them together using unique IDs	Research, organizing thoughts and knowledge	https://zettelkasten.de/posts/overview/	It came from a paper card system, but still used digitally today.
Getting Things Done	Take information into an inbox, then have a solid workflow for “processing” it to find the actionable stuff	Tracking todos, getting longer running projects done	https://gettingthingsdone.com/what-is-gtd/	Excellent ideas to borrow from, such as “always define the next action” for large projects. Very simple 6 stage workflow. I borrow heavily from this in my personal system, combined with the ideas behind P.A.R.A.
Johnny Decimal	Organise your folders using a smart numbering system to aid memory and reduce chaos	Organising files and notes using only folders without creating chaos	https://johnnydecimal.com/	The idea to try to constrain the folders you create is smart, as folders are so flexible they quickly descend into chaos. This system is outstanding at taming that chaos.
Linking Your Thinking	Keep track of your ideas and learn things by writing your own material using links to organize	Learning things, thinking, and getting some good rules around linking	https://www.linkingyourthinking.com/	More of a course than a system, but a great primer for those looking for use cases for “linking”, particularly using Obsidian. The designer also runs a regular course.

Name	Basic Concept	Good For	Link	Notes
Evergreen Notes	Some rules around writing good, solid notes that you will want to read again	Incorporating into any other system as a set of rules to keep your notes useful	https://notes.andymatuschak.org/Evergreen_notes	I read these rules every so often to remind myself. They are very powerful. The website itself is writing using these exact rules.
Pillars Pipelines and Vaults	An “all size fits all” system for Notion	When you don’t want to figure out your own system and use someone else’s	https://www.yearzero.io/notion-life-design	Wants you to pay a lot of money to see what this system is about. You will see a lot of examples of this on the Internet these days. I have not paid this man so I can’t comment on the viability of his system. I just include this to show that “full, paid systems” exist.
The ACCESS system	A very close alternative to P.A.R.A that incorporates space for thinking and the use of links	Those who like P.A.R.A’s style but want guidance in incorporating links	https://www.youtube.com/watch?v=p0zWJ-TLghw	Created by the owner of the “Linking Your Thinking” site/community. A good comprehensive system for someone who wants something more fleshed out.
Journaling	Reflect daily to offload your thoughts and understand them more clearly	Daily growth and thinking	<i>various, no one ‘owns’ this, check google for a good explanation</i>	It’s good to get into the practice of reflecting on your experience. If you are struggling to get started with creating notes from your thoughts (graduating from a note taker to a note maker), Journaling can provide a good entry point.

Special Thanks

Special thanks to my wife Watoo who spent many, many hours rehearsing and tweaking my talk until it made sense.

Special thanks to Petros for rehearsing with me and giving me feedback which shaped the direction of the talk.

And thank you to the PMI Chapter for giving me the opportunity to deliver my first talk!

Want to talk?

If you have any questions or would like to talk about this topic, please reach me at:

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