



The m2b8 - Paper Planner

The Mainspring of Civilisation...

If productivity is the truest form of progress, then paper is the truest record of such.

Paper planners are the cornerstone of any good productivity system. While computers make an admirable job of keeping shared calendars, minimising duplication and allowing instant global communications, oddly, it isn't enough.

Computers lack both the immediacy and the tactility of a paper-based system. Immediacy is important when you are documenting ideas or making notes under pressure. Have you ever noticed how people who purchase hand-held electronic organisers tend to start meetings using them and finish meetings drawing and writing on a piece of paper?

I speak as the designer of a computer-centric next-generation data system.

When you need to make notes in a hurry there is nothing better than a pen or pencil and paper.

Tactility is also important. Your mind works entirely through your body, your senses, and the more tactile the connections you have with what you are doing the more you are likely to remember what it is you are doing. For this reason I favour a fountain pen and a mechanical pencil on good quality paper. [Paperchase](#) is an excellent source of high-quality paper and desk equipment in the UK.

For ubiquitous note-taking I use a wallet with a built-in organiser, a vintage Filofax Slimline. Vintage for Filofax actually means that I bought it in 1990! I have been a Filofax owner since the mid eighties when Filofaxes were a big consumer item to the point of ridicule. The fact remains that the Filofax is one of the great ideas in design, ranking alongside the wheel, the pencil and Sunspel underpants. Filofax also owns 'Yard 'O Led' writing instruments which despite their proleane name are very good. It is worth spending money on writing instruments for all of the above reasons. I buy mine from [Andy's Pens](#).

Casual note-taking can also be achieved using a [Moleskine](#) or similar because you will transcribe these notes immediately onto a computer or other system. Moleskine, is a recreation of an old idea: basically a fixed notebook with optional pockets inside. Think in terms of the 'grail' diary from the third Indiana Jones film. This is ideal for collection and makes you look studious in a coffee shop. High quality notebooks are more suitable for



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those engaged in a single project, such as authors. The lack of page flexibility can be a problem for executives and portfolio workers.

Some use index cards and a big clip, some lunatics use a bizarrely folded piece of paper.

I used to use a pocket-sized Filofax which was too small for easy note-taking and too thick for a wallet, it made me look like I was carrying a treasury with me and both of my pounds were agoraphobic. Returning to the Slimline solved all my problems, except the issue of only having two pounds.

The whole point of these tools is that you have them with you at all times and pour all your thoughts and ideas into them without spending time processing or arranging. That comes later.

Some people process the information they gather straight into a computer using project planning software, GTD applications or more hacker-ish text systems. I've tried all three and strongly favour the [OmniFocus](#) package. I'll describe my choices in greater detail in another post. Others prefer to take the process further on paper. I do both...

Once you have collected raw data straight from your brain it is very important to clarify at which stage is the data. Are your thoughts ready to slip into an existing project? Are they the beginning of a new project? What you need to do is write it again. Tedious though this sounds, re-statement is how you move abstract and often impractical thought into the realm of practical actions. I do this by writing anything that isn't complete and ready for the computer into my project system, a work organiser. For this I use an A5 Filofax Domino.

Size is important, don't let anyone tell you otherwise, they're just being kind. For a full system, including meeting notes and illustration, you need to go to the A5 or even A4 size. I use A5 because it can be unobtrusively carried and will fit into a briefcase (or messenger bag if you're trying to convince the world you are still young and hip). It is important that you learn to use your printer/copier in order to fill your organiser with copies of important documents. If your office systems mandate A4, then that's what you are stuck with.

A very good tip, before you decide which size to go for, cut-out some paper of that size and use it as your normal daily note-paper. You will soon arrive at the size that suits you. My handwriting is huge and I tend to draw a lot, so I have used A4 in the past, but then the organiser is larger than a notebook computer. Find your size then budget for a Filofax hole punch, it will pay for itself.

An interesting point that I've discovered is that the A5 size is in no way a compromise if a. You have a multi-feed multi-function device (printer, scanner, copier) so that you can have trays filled with both sizes and b. you can read small text. The only problems I have found have been with other people's documents featuring 'stylish' grey text. Tell people not to do this. A5 pages print in half the time and use half the resources.



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There is a personal point I would like to make about organisers. While being productive and organised is very important, would you die for it? No? Then don't kill for it either. Nobody needs a leather organiser and nobody could tell that you don't have one if you don't tell them. My Domino isn't leather, but looks it. The Slimline is leather, I bought it when I new no better but throwing it away adds insult to injury. When it wears-out, it will be replaced by a non-leather item. Please Filofax, make a Slimline Domino.

Another, more general point. Before you buy any expensive add-ins such as maps, pockets and 'novelty' items, establish your system and use it for a couple of weeks. You need to know how much space you will take-up first. If your organiser is too full, it will be a pain to use. I return to this subject near the end.

You will also need dividers. In an A4 organiser, you can use inexpensive standard dividers, 5 part for the front of your organiser, 10-part for the projects. In smaller organisers, you have to use what you can get from Filofax or make your own. I make my own from A4 transparencies normally used for overhead projectors. Simply set-up a template with a text box just over half-way up the page and whenever you need a divider, type your section description and print. I've also added a vertical text box on the edge of the top half for use as a bookmark. For this you have to stamp your holes 8mm too low, so that it pokes out of the top of the pages. If you need a few of these, invert them so that they poke out of the bottom.

Some transparencies allow you to print on them, giving an ideal opportunity to include an illustration or mind map appropriate to the section it describes.

The planner is described in detail in the following section.



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A photographic record of the extent of my insanity. My Domino and Slimline backed by some original oils by my Grandmother and a print of Richard Dadd s Mimosas.



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Planner Sections

This is my design for the work organiser. Many of the sections could also be included in any wallet system you may wish to carry. There are three main sections; Collection, Documentation and Reference with subsections in the Documentation section.

Collection

In front of the first divider and using a bookmark so that you can get to it immediately - Blank or ruled sheets - Write or draw EVERYTHING here.

If you do use a divider in front of the collection system you have the option to include an attractive front sheet. You could include a picture of loved ones, personal information, a GTD diagram or a reward statement. You could even encapsulate your whole being in a photograph or drawing. That is a challenge.

At the time of writing I've got a print of Blake's 'Hiob: When the Morning Stars Sang' from his collection of illustrations of the book of Job followed by some details of how to contact me if the organiser is lost. I sympathise with Job.

Another good reason for a frontispiece is that you can create a stiff first sheet so that you can write on both sides of the first few pieces of paper and protect yourself from the dreaded credit card slots. Simply spray-mount a piece of plastic and stick the Frontispiece to that.

Documentation

The middle section deals with the documentation of the projects in which you are engaged.

1. **Overview** - High-level planning for top-down freaks. Contents include:
 1. An index of what you are doing. I've printed the personal blueprint I have written. This documents what I am doing, when I do it and VERY importantly, why. This will be the subject of another post.
 2. Harmony Sheets - This is a life priority planner system - while this isn't a part of my course because I don't use the system myself is important if you want to make sure that you are paying attention to all of the important areas of your life. You will find instructions as to how to do this in any Stephen Covey book. If you use software such as [Life Balance](#), here is where the printed output goes. Too geeky for me, and I change my mind about importance at least three times a day.
 3. Potential Projects - The staging area for ticklers. Sketch ideas here before moving them via the pages below to 'Projects' when you are ready to act on them. I include documents describing things I've yet to form into proper projects on my computer but which no longer belong in the collection system.



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2. Calendar

1. Whether or not you manage your calendar on a computer, which you should if you work in collaboration with others, it is a very good idea to keep at least seven days in advance here. The reason for this is that short-term problems abound in computer systems and having this means that you can carry-on seamlessly.
2. In addition, include meeting agendas in this section and you know you must always prepare meeting agendas, don't you...
 1. Agendas should be the same as those you e-mailed to the others involved in the meeting.
 2. Also worth including are some blank sheets from David Seah's [Printable CEO](#) system. You will hear about this at great length in the future.

3. Contacts

1. Printed from your computer address book or using the contact sheets.
2. You should include a pocket of some description here in order to collect business cards.
4. **Actions** - This is your tasks list, divided into contexts and 'waiting-fors'. You can use hand-written ones as described in [my first podcast episode](#) or replace these pages with pages printed from a software package. If you use output from software, add a couple of blank pages so that you can create an ad-hoc context list if a change of plan takes you somewhere you hadn't planned to go.
5. **Projects** - As is mentioned in [my 'Productivity' episode](#), a project is simply something you wish to achieve that requires more than one task in order to reach completion.
 1. I create at least one document per project and include it here
 2. More complex documents warrant an index document which references other work, all should be included if they are concise enough to fit. If your Job is to compile an encyclopaedia you may wish to restrict your inclusions to current areas of study.
 3. A very good idea, which I am implementing at the time of writing is to include a sheet listing a number of questions you should ask of yourself and others which will help you to establish a well-formed project. More of which anon.
 4. Don't put anything here until it is a functioning project, you don't want to frighten yourself.



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Reference

This section deals with non-project materials - Anything you might need can go here. Print it, punch it, file it...

5. GTD Overview - If you can be bothered.
6. Workflow procedures. At some stage in the future I will cover how to formalise ways of interacting with resources by establishing procedures. If you work in government or big business you will already know about this. Put them here.
7. Important documents - these can be reduced by your printer if the planner is smaller than A4. If the document is project-specific it belongs with the project. If the document is relevant across more than one projects it belongs here.
8. Flyers - I have the opening times for my local [Chick Chak Falafel trailers](#). Other information leaflets can be collected from libraries and similar. Don't forget that photocopiers can reduce and put many flyers onto a single sheet of A4 or A5 if that is your bag baby.
9. Pockets - Collect atoms in here for later processing.
10. Maps, timetables, Swiss cards, combs, calculators, post-it pads and suchlike should be included with extreme caution. All are useful but you have to respect the bulk of your organiser because you are at its service when it is not at yours. If your organiser is too big and heavy you will not use it.

Conclusion

This is your life, on paper. If you look through literary history, you will find that those who are remembered, those whose achievements are available to future generations, are people who have bothered to document their lives. For this reason, if you are aware that you are a pillock, don't do this unless you wish to provide material for future comedians.

I'm not trying to turn you into Boswell or Pepys, but I am reminding you that if you achieve something, no matter how small, it is important that others learn how you achieved what you achieved. Progress can only be made if we can build upon each-others work without regression or repetition.

Plan what you want to do, do it, then show others how you did it. Documentary evidence is important.

Get on with it.



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