

Blood, Sweat and Productivity

Articles on productivity and GTD

I mostly think about productivity through the lens of GTD, but I do wander well beyond.

[Allenism, Taylorism and the Day I Rode the Thundercloud](#)

[The Headcount Myth and the Value of Overbooking](#)

[How to Make New Year's Calibrations](#)

[Theory W, Theory X and Theory Y](#)

[How to Measure Information Work](#)

Allenism, Taylorism and the Day I Rode the Thundercloud

By: Venkat on January 7, 2009

News flash: I was just interviewed (you can [listen here](#)) along with David Allen, the man himself, about this article, by Karen Hammer at [KGNU](#). If any listeners found their way here after the show, welcome to ribbonfarm! If you are interested in having some fun organizing your life, you might want to send in a picture of your desk to the [Cloudworker.org](#) 'Workspace' contest!

Today, January 7th, was a brutal bitch of a day, and it was a great day. Every grim reality of the cloudworker lifestyle, the dark side of everything from mobility and laptops to eating on the run and elite car-rental status, hit me with full force. Both my New Year's resolutions were hammered by gale-force winds. The business of life hit many potholes, and the game of work threatened to fall apart on me. But I not only survived, I actually made it a better-than-average day. I made it all work. Truly, it was the day I rode the thundercloud (I stole the phrase from a really old Reader's Digest article I read as a kid).

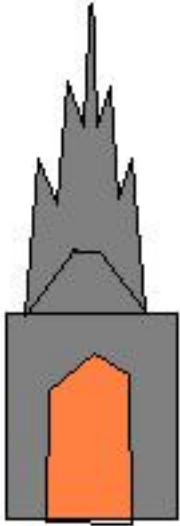


And that's why as my first post of 2009, I will offer up a meditation on the life-work of David Allen, he of [Getting Things Done \(GTD\)](#) fame, and his new book, [Making It All Work: Winning at the Game of Work and Business of Life](#). I'll tell you all about the role of Allen in the emerging landscape of the future of work.

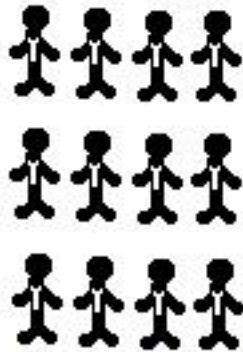
Here's the short, illustrated version. In 1911, Frederick Taylor invented the management model of [Taylorism](#), which became the operating system of the [The Cathedral](#), where the [Organization Man](#) was born, with William Whyte becoming his biographer. Six Sigma is the last hurrah of Taylorism. Ninety years later, In 2001, David Allen, with [Getting Things Done](#), created Allenism. A model of work that is well on its way to becoming the operating system

for the antithesis of the Cathedral, [The Bazaar](#), home of the [Cloudworker](#), whose biographer is undoubtedly [Dan Pink](#) (I just came up with the word, Dan's written three books about cloudworkers). Eric S. Raymond, who wrote [The Cathedral and the Bazaar](#) about the open source movement, billed himself an accidental revolutionary. I am more modest. I'll call myself the accidental wannabe-word-coiner, and hope that 'cloudworker' at least merits a footnote in the history of work. Anyway, here's my picture explanation of Allenism vs. Taylorism:

Before: Taylorism, 1911-2001



Cathedral

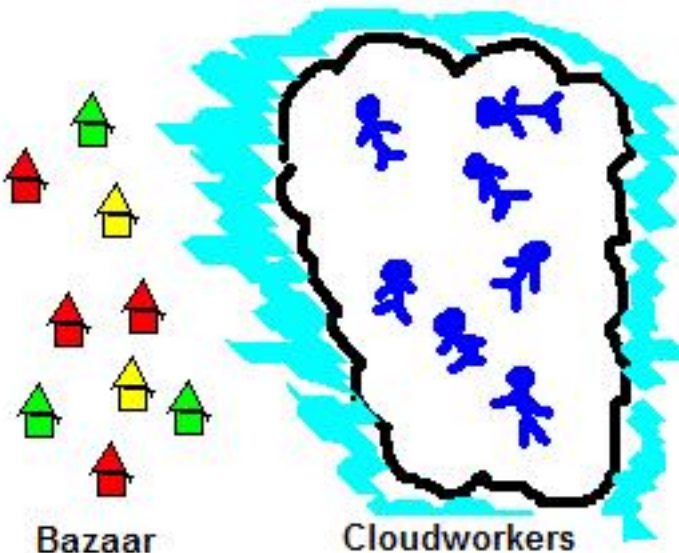


Organization Man



Frederick Taylor

After: Allenism, 2001-2091



Bazaar

Cloudworkers



David Allen

You doubt that GTD is the future of work? The original GTD book has been seeing **increasing** sales every year since publication and is currently at an astronomical #53 on Amazon. With MIAW, a tipping point has been reached. The future of work is now here.

But to understand it, we have to zoom down from these century-level dynamics, what Allen would call the 50,000 foot level, to the runway level: 8:00 AM, the morning of 1/7/09, Wednesday, hump day, when the thundercloud hit me.

8:00 AM: The Hour of the Ice-Scraper

I get up after a godawful night's sleep at the Holiday Inn. I'd forgotten to pack my pajamas in my rush to the airport yesterday, and had tossed and turned, miserably chilly in my boxers, until I finally put on my jeans at 1:00 AM and slept in them. So I wake up feeling like crap, and I can't even drink coffee -- I have to go get a blood test for my cholesterol. And oh yeah, I also forgot my corporate credit card. So I have to pay for my trip stuff with my own card and write a 3x more annoying expense report. And I forgot to bring my daily cholesterol meds.

So I shower, dress in my slept-in jeans, skip shaving and get ready to leave. Then I realize I've forgotten to put my new health insurance card in my wallet, so I call wife to ask if she changed our plan or something, and to my relief, she says no, my old card should work. And while I have her on the phone, I remember **just** in time to tell her NOT to mail in some tax paperwork that I left on her desk -- I am waiting for another letter to come in. She's far too good about mailing things on time. And yeah, the paperwork has to be done quick because I learned on Monday I am being audited. New York State thinks I owe it 2003 taxes and I have to scramble to find a proof of address from my Michigan home during that year. Cloudworkers have to get used to those partial-year resident forms. I am barely settled in Virginia now and my wife wants us to move to Maryland or the district. Oh well.

So out the door, and then I realize I've forgotten my lab test form, so I turn around and THEN realize I've locked my key in the room. So down to the reception desk, get a new key, back up, get form, out the door. Finally I can get underway. Or not. The parking lot is being battered by the freezing rain. This is Rochester. My rental car is covered in ice, and there is no ice scraper in the car. Great. Just great. Scrape scrape. Rub hands, rub hands. Scrape, scrape. Rub hands, rub hands. Sit in car waiting for thaw. Did I mention that I am driving a terrible Chevy HHR, because of an 'upgrade' (gee, thanks!) by my car rental company, because I have some sort of 'Elite' status?

I am now running 20 minutes late, and have 30 minutes before my 9:30 meeting. Do I even have time to stop by the lab to get my blood test, grab some breakfast and coffee (I am starving from the 12 hour blood-test fast) and make it in time? Crunch time. I could cave and skip either food or the test, but I NEED the test today so my doctor will have the results for our appointment Friday, before I leave town. Yeah, I live in Arlington, VA, but my doctor is still in Rochester, NY. And I HAVE to eat or I'll tune out during my key morning meeting.

Decision made: I am going to go for it and try to do both and be on time. I rarely swear, and today I am muttering M***F*CKER under my breath. Actually a coarser Hindi equivalent that you may have heard if you saw **Slum Dog Millionaire**. And it's just 9:00 AM.

Allenism Principle: Reactivity and The Business of Life

MIAW's subtitle is **winning at the game of work and the business of life**. On days like this you realize why it is the **business** of life. Paperwork, health insurance, forgotten pajamas. Like Allen says, it's all stuff that goes into your Inbox. And then life hits you with no ice-scraper.

Reactivity. Switch context on a dime, swing, duck, process something so fast it doesn't even touch your inbox. Cathartic post-hoc add-to-list-and-cross-off moves are for wimps. Tell-wife-don't-mail-tax-stuff-yet didn't even hit my next-action list. It just came up in my mind in the right context, and I just handled it.

And that's Allen's first great contribution to a world dominated by Taylorism and waterfall planning. What Scrum and agile programming did for the narrow world of software engineers, Allen did for the rest of us. He made being reactive not only respectable, he gave it a sort of glamour. Allenism isn't about knee-jerk grease-the-squeakiest-wheel reactivity. It is about being so well-organized, no, **well-orchestrated**, in your life that you can react instantly and **appropriately**. Not cut corners, not do without, not wimp out. And it isn't stupid systems-for-the-sake-of-systems. Allen insists that his system is complete and all-encompassing. And it is, because it is robust and flexible enough to handle things that never even hit the system, because it anchors your whirlwind of a life enough that you feel confident enough to override the GTD autopilot anytime and go 'real-time' if necessary to overcome a situation. There is reason for faith -- it is arbitrary and overweening systems that are brittle. They are so liable to fall apart if you do any ad-hoc exception handling, that they get in your way when you attempt to do so. The beauty of GTD is that it manages your life, not your freedom to react in flexible, ad-hoc ways.

His image of reactivity is 'Mind like water,' the martial arts ideal. Cloudworkers, obviously need mind like water. Especially when facing ice without an icescraper on a thundercloud day.

9:30 AM: On making, missing and forgetting meetings

Yay, I've done it. Blood test, check. Breakfast, check. Make it to meeting at 9:30 on the dot. Check. Everybody else apparently stuck with their own ice-storm day problems? Check.

My co-workers come in a few minutes late. They have had tougher issues than me -- some are kid-juggling Moms and part-timers, cloudworkers with more to deal with than me. One offers up a helpful hint on being caught in ice without a scraper: use a credit card. **Awesome idea!** I think. I could've used my expired health-insurance card.

So, we talk, and it's a productive meeting (curiously enough, about some research we are doing on the future of work), and it runs over. I haven't bothered to turn my laptop on, so I have no idea where I am supposed to be at 10:30, and it is now 10:47. I am too lowly in the ranks here to get a company-sponsored blackberry, and have so far been too cheap to get my own. But finally I turn the laptop on at the end of the meeting and I discover I was supposed to be in a critical staffing meeting one floor up, from 10:30-11:00. Crap. And oh yeah, as she's leaving the room from this meeting, one of my team members asks innocently, "so you all ready for our big 1:00-5:00 PM meeting this afternoon?" **Double** crap! For some reason I thought **that** meeting was tomorrow. It's merely the big 2009 kickoff for the projects I run, with a dozen people attending, and yeah, I am supposed to run it and have my vision-level 2009 slides ready. HELL! I thought I'd have all of this evening to finish THAT! And I have an 11:15 - 12:00.

So I run up to my manager's office to see if I can catch the last few minutes of the staffing meeting, and manage to catch her for a few minutes. She's quite nice about me missing it and gets me up to speed. They managed to process stuff without me, since I'd already sent in my input. I sigh in relief, and head towards my 11:15 in the next building, wondering whether to beg out of that meeting so I have more time to do my last-minute vision-2009 slides. Again, I make the go-for-it decision. I am going to do the 11:15-12:00, finish the slides

AND grab lunch. I don't want to pass out in the middle of a four-hour meeting.

So, I do that. Finish my 11:15 meeting (again, lots-of-irony day, the meeting is about GTD stuff we're trying to do at our company). Both I and the guy I am meeting are GTD-users, so we process efficiently -- this is mind-meld stuff, this is -- and I get a precious few extra minutes. Am hammering away at my slides 11:48 - 12:53. And yeah, I get the slides done, and done **well**, with some creative cartoons thrown in. Fortunately I **hadn't** forgotten my nice red plastic folder marked 'In' which is my traveling Inbox and lives in my laptop sleeve. Being a disciplined GTD guy, I'd remembered to dump the rough mind maps for 2009 project planning I'd sketched on Monday into it, so I have the raw material. I can actually get the slides to say what I wanted. No corners cut. Whew! Mail it out to attendees, rush over to grab a slice of pizza from cafeteria, run back and am in conference room again, just in time. Initiate conference call, power up projector, fire up LiveMeeting, check that the California folks are there. The India folks are going to miss this -- a total 14.5 hours time difference across all meeting locations is just too much to navigate, something has to give.

Phew. From a near-crash at runway level, we have take-off. Off to 50,000 feet to do that project vision thing, cartoons and all. I survive it, people seem reasonably engaged given that it is a marathon meeting, and we actually do some very creative brainstorming right until the very end. A few really cool new ideas for our projects bubble up.

Oops, it's only January 7. Am I already in danger of violating my resolution not to take on anything new, and to actively drop stuff? How do I react to these new ideas? I am sorely tempted to steer the meeting towards discussing only 'execute what we've already got moving' themes, but I resist. We need these ideas in the hopper **and** the discipline to not commit to all of them. I'll just have to find a way so we go after some of these new things as a team, but without me taking on anything more myself, if I am to keep my resolution.

Allenism Principle: The Game of Work and being 'Ready for Anything'

It isn't just a clever turn of phrase. If taxes and health insurance make life feel like business, then the need to be creative for mind-numbing-by-default stuff, such as Annual Kickoff Meetings, makes work a game. And yeah, darting through a bumper-to-bumper calendar is the cloudworker sport on those days that we precipitate back into HQ.

I was caught off-guard needing to make a critical set of slides and prepare for a big meeting where others were depending on me to **not** waste four hours of their lives. From the chaos of a day threatening to turn into a train-wreck on a runway filled with bumper-to-bumper traffic (how's that for a mixed-metaphor), I had to not only raise my own thinking to the Big Vision level in just a rushed lunch hour, but take a dozen people along with me for the ride. And I am just a rank-and-file guy. Imagine the C-suite pressures.

Not easy, and you wonder if you can take off. At such times, it is the incredibly mundane that rescues you. The habit of carrying relevant stuff in my red 'In' folder paid off. And yeah, the reason I **didn't** get blindsided by some decision at the meeting I missed was that I'd been on the ball on **that** issue and touched base on it just 2 days ago, thanks to my weekly GTD review which reminded me to keep touching base on that issue. So my views had been represented at the meeting.

The other big thing Allenism brings to the game of work is a realistic and substantive understanding of visioning, mission-planning and those other 50,000 foot things. Yeah, we need 'em. And no, most of us **don't** do them right. We do ritual and ceremony rather than genuine expanded-perspective exercises. And we do that because generally we **cannot** free

our minds from the runway clutter to truly take off and create meaning at those higher levels. So instead we get vacuous, uncreative placeholder bullshit. Stuff that makes everybody want to yawn and get out of those 'Big' meetings. Any idiot can pull off a grand strategy meeting in the middle of a relaxed, expensive executive retreat with an army of assistants. But visioning is for all of us, in stolen moments through every day, and doing it with scarce resources while you are navigating runway traffic is what is truly hard. And worthwhile. The meeting did do what it was supposed to. Yes people were exhausted -- they call 'em marathons for a reason. But we got there.

And don't forget that I made yet another energy decision. I could have chosen to cancel my 11:15 to get more breathing room, but cloudworkers don't have the luxury of always-available face time with key colleagues. If I'd canceled, I'd have had to move the meeting to remote. Not good. I was able to put good slides together **and** keep my meeting because of a simple red folder that happened to contain 2 sheets of paper with useful scribbles. You still think trivial organization aids are irrelevant?

That's the beauty of GTD. Another Allen quote is that the people who are moving fast are the ones who most feel the need to eliminate drag. This is what eliminating drag looks like.

5:00 PM, and I look like hell

So I stumble wearily back to my hotel. I am craving some Indian food from my favorite Rochester place, but that's across town. Do I have the energy? I just want to crash. Back in my room, I am sorely tempted to turn on my computer, kill some time on twitter, and turn in early. I survived a brutal day didn't I? I deserve to crash.

And then I see myself in the mirror. Unshaven. Red eyes. Don't forget I didn't take my meds today and that I am getting a cholesterol-related check-up on Friday. Health is high on my radar. And it hits me hard: it is only Jan 7, and my **other** resolution, about improving my health, is also getting hammered today. Dunkin' Donuts for breakfast. Cold pizza for lunch. Too tired to exercise after work. What the hell IS this? I think back wistfully to my occasional peak-health moments, like back when I was on the college swim team as an undergrad in 1994-1996. How did I get to this? How come I keep hitting a 'peak health' month every few years, but keep sliding back? I slumped 97-98, but peaked again in 99. 2000-01 were bad, but in the summer of 2002, I was running 3 miles a day. Slumps and peaks continued 2003 through 2008. 2009 was supposed to be the year I finally figure out how to **stay** at the peak.

Did I really conquer my brutal day at the cost of my body? Am I going to give up and slump again?

So I decide, NO. Perhaps one day in 2009 I may fall off the wagon on my health resolution, but it is not going to be this day. I shall go running on the treadmill in the hotel gym. Firm Resolve. Yes!

Or I would. Except that I've brought my running shoes, but forgotten my running shorts. I rarely ever forget stuff on a trip. This time has been this bad, I suspect, because I exhausted myself finishing a chapter of my book late into Monday night, and dealt with the tax paperwork and some stupid expense report mistakes on Tuesday. For a paperwork-phobic guy like me, that's enough to drain me. Writing the chapter should have been a high, but it had been one of those tough-grind chapters rather than the flows-effortlessly ones.

So here I am, having survived a draining Monday, a phobia-ridden Tuesday, and a thundercloud Wednesday in a mess of a trip. And I am about to fall off the health wagon.

Fortunately, I **did** remember to bring my swim trunks. So I go swimming instead. A few laps and some hot-tub time, and I am good to go again. I decide I am going to write this blog tonight, and wonder if I have time to go across town for Indian food. Again I make the maximum-energy decision. I'll get my dinner, **and** write a blog post, **and** buy pajamas on the way.

Allenism Principle: Yeah, Even the Big Stuff Needs the Mundane Stuff

Okay, I am calling this a thundercloud day for a reason. I am not usually this run off my feet. Mostly I am relaxed, having fun, with plenty of time to do everything I want to and need to, and still leave people wondering how I seem to power through so much. I am **not** bragging. I am simply pointing out the enormous (like 6x-10x) productivity difference apparently dumb shit like little red folders and swim trunks and a few lists can make in your life.

Dog-tired and a mess at 5:00, looking at myself in the mirror, I **should** have seen a trainwreck. I **should** have wanted to give it all up and go join a Fight Club. Cloudworking can seem like a futile, pointless, what-is-it-all-for life from the outside on these bad days. Maybe the sedate, suburbia-dwelling Organization Man had it right. But from the inside, it is not the **I-look-like-crap** observation that matters. It is how I choose to react to the guy I see in the mirror.

Call it silly, but the little techniques of GTD make you an optimist about life and possibilities. I looked into the mirror and only for a moment saw bleakness and darkness. The next moment I thought to myself, **these are battle scars, this is the REAL fight club, not the ritualistic bash-other-men fight clubs of Chuck Palahniuk**. Winning -- and this isn't crass career winning, but **existential** winning -- at the game of work means you sometimes take a beating, running some rough plays.

But you can't be dumb about it. You have to live to fight another day. This means that when the game of work is done for the day, you could be a battered mess, but you still have to revisit an even higher level for the day -- the level that keeps body and soul together.

And again, GTD doesn't preach about holistic health and other distractions for people too afraid to dive into the fray of real life. It just tells you about making folders and lists and staplers. And somehow these become the meditative tools with which you go to fight spiritual wars. I resisted the urge to give up, and went swimming instead. Being on GTD for 7 years has so consistently given me control over the chaos of work and life, and allowed me to rise above it, that it has effectively given me the gift of learned optimism. I was optimistic enough about exercising in the middle of a packed trip to pack **both** running gear and swimming gear. Yeah, I forgot some of the running stuff, but the point is, the redundancy saved my noble intentions from collapsing. Maybe for only another day or two, but the swimming is going to keep me on the wagon just a little longer. That's how you live out your spiritual and bodily intentions -- one day at a time, same as your paperwork and meeting intentions.

7:30 PM: Pajama Party and the Ironies of Work and Life

So, relaxed and refreshed, if still tired, I go grab dinner, and brainstorm notes for this blog post while eating. And yeah, don't tell me to live in the moment. Brainstorming makes a tasty accompaniment to **chana masala**. You're the one who has low bandwidth and can experience only one thing at a time.

So I head home. And 20 minutes away from the restaurant, I realize that my triumphalist

notes for a blog on surviving my thundercloud day have been left behind at the restaurant. At this point, I just have to laugh at the irony. This thundercloud day has a sense of humor. It is even messing with my attempts to blog about conquering it. I am still smiling to myself as I walk into Target to buy pajamas.

Serendipity strikes. I've been using a single pair of ratty and torn pajamas for a while, and as a new cloudworker, I've been idly meaning to get myself not one, but several nice new pairs of pajamas to work in. For some reason, I can't seem to find any I like in DC. Here, at Target, I find a sale going on and a bunch I like. I buy 2. So my forgotten pajamas help me recognize and cross off a task I didn't even know I had on my list. I buy them, and a coffee, and head back to the hotel. Here they are, draped over my chair near my temporary hotel-room desk.



I put one pair on, call the restaurant to make sure they have my forgotten notebook, tell them I'll pick it up later, and get down to writing this post.

Allenism: Making it All Work At the End of the Day

So there you have it. I hope this gives you a good reason to read both of Allen's books. If you haven't yet read [Getting Things Done](#), read that first and test-drive it for a few weeks before tackling [Making It All Work](#). It isn't a sequel, it's a research-oriented and speculative drill-down into the original. It isn't like the execrable **8th Habit** by Covey or the horrible **Tenth Insight** by that Celestine Prophecies guy (the first book had 9). Best-selling self-improvement authors can't seem to resist the temptation to mess with their own success; they invariably overreach with their second books, and retroactively ruin the first. Allen has resisted. MIAW is not a sequel, it is a disciplined and restrained work that stays within the boundaries of the original and deepens your understanding of it. It has no new principles or techniques or tools. His own metaphor is the best. If the first book showed you how to drive the car, this book is about how to repair it.

Get out there, learn how to drive and repair your car (or your plane really), and join the cloudworker class. I am off to bed now to die another day tomorrow.

The Headcount Myth and the Value of Overbooking

By: Venkat on October 7, 2008

Fourth quarter, when a young information worker's thoughts turn lightly to thoughts of headcount. I've [argued before](#) that the idea that headcount (a.k.a HC in managerese)

measures information worker bandwidth is a myth. The interplay of [strengths](#) and the ambiguity of definition of information work conspire to make it so. Headcount persists as a fixture in resourcing discussions because it signals relative priorities (and because we haven't found anything better). So far. Here I'll argue for a **far** better way to optimally use human bandwidth: true overbooking via continuous planning, coupled with strategic quitting. First, let's understand why headcount is a dumb measure of resource capacity and bandwidth, using one of my famous drawings. This one shows how 3 different workers (assume they are equally valuable) might react to 3 different loading conditions, and how much they can drive themselves before it becomes too much and their capacity "overflows." Think of capacity overflow as "brain muscle failure."

[caption id="attachment_439" align="aligncenter" width="442" caption="The Headcount Myth"]

PROJECT A



PROJECT A

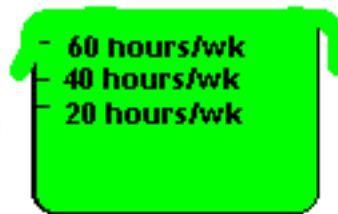
+

PROJECT B

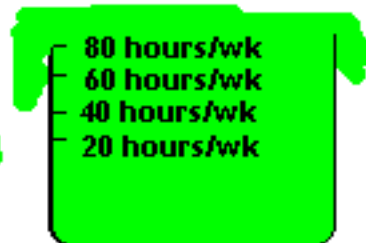
Nominally 50-50



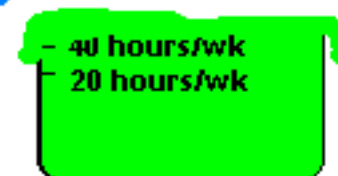
PROJECT B



Worker A



Worker B



Worker C

Does Headcount Measure Bandwidth?

www.ribbonfarm.com

[/caption]

The key to the diagram above is the **actual** overflow point under given project loading conditions for different individuals. From the picture above, "100%" (or 1 HC) clearly means radically different things in the 9 cases. Let's remind ourselves why HC and traditional "project" definitions are mostly meaningless for the purposes of **real** (rather than ceremonial and budgetary) resource management and capacity optimization.

Why Headcount is Dumb

Quite simply, HC is silly because people like to work on different things, and have ridiculously different productivity levels on projects (or mixes thereof) that apparently need the same skills. They also have different preferences about the amount of variety they like in their work. What is unacceptable fragmentation for you may be minimal variety and risk-hedging for me.

The other big reason HC is dumb is that it inherits its logic from the logic of project factorization, which is itself dumb. Here's an example.

One of the sillier claims I have heard (I think I saw it cited in Stephen Covey's execrable **Eighth Habit**) is that multi-tasking is bad and that going from 1 to 2 projects significantly drops your probability of succeeding at either.

This is a dumb claim for one big reason: the idea of "project" is nearly impossible to define meaningfully in the context of modern information work.

If you use a relatively clear measure of "projecthood" like [David Allen's "Anything that takes more than 1 step and can be done within a year,"](#) then the typical individual is carrying something between 50-70 projects at any given time. Multitasking is a fact of life, not a choice. If you use standard waterfall organizational definitions ("things which are budget line items and have ambiguous and malleable expectations attached called 'deliverables' that will likely still need re-negotiation by Q3"), the typical individual is carrying between 1 and 4. These are purely nominal numbers, because of the typical level of incoherence in the nominal "projects" and the real/false synergies among "projects," in most organizations. In a truly Dilbertish world, this can create conditions where my 1 project is actually 4 and your 4 are coherent enough to actually count as 1. Finally, if you adopt a broad, new-agey approach, your whole life is one big project, all leading up to one giant deliverable to yourself on your deathbed. This is actually an operationally useful view, as I'll illustrate in a minute.

I tend to ignore the middle level of coarseness, except for budgeting purposes, and work either by the Allen definition for actual resource/work estimation, and by the new-agey definition to keep it all together.

So if we each typically, in a meaningful and measurable way, have 50-70 projects, clearly, thinking about HC at the level of 0.01 - 0.02 is beyond silly. We don't even know what 0.5 HC means. How on earth will we measure 0.02?

Yup, the human mind is a rich and wonderful thing. It seems to admit a million sorts of bandwidth definitions. How many hours of email can you handle? Powerpoint talks? Writing? Reading? Coding? Relationships to manage? Errands? Paperwork?

How much **actual** work is involved in committing to a weekly 1 hour attend-a-meeting level consulting role in a project? Is it really 1/40 HC (2.5%)? Assuming you are a lark with high morning energy, will it make a difference if the standing meeting is on Tuesday at 9:00 AM vs. Friday at 4:00 PM? How does opportunity cost work out? What about time spent on

meeting-follow-up email threads?

Overflow Detection, or Working to Brain-Muscle Failure

You cannot measure work **and** bandwidth in meaningfully comparable ways. You [can measure work by itself](#), as I argued before. So on the bandwidth side, what **can** you measure? Well, nothing with numbers, but you **can** detect an event: overflow. The human mind is an amazing **null** detector. It is bad at detecting 50 or 75% of its own capacity, but it can detect "full."

Full is when there is a **sharp** drop in quality in non-trivial work (writing complex emails, tricky code) and/or a **sharp** increase in "falling through the cracks" for trivial work (missing appointments because you plain forgot, losing pieces of paper). The key is that it is **sharp**. You may see people talking about how they are "overbooked" (not calendar-wise; load-wise) but they are either just engaging in ritual moaning, or are taking HC seriously.

Trust me, when you hit your limit, **you will know**. Your internal barometer of productivity will register a "oh crap, things are going to hell" condition. Worse (though even more detectable) you may freeze into stasis. It is the mental equivalent of muscle failure when you are lifting weights near your limit (work-life balance fits into this scheme by the way, since life/family stuff counts as work when it comes to measuring overflow: missing a kid's soccer game by accident is an overflow event).

So why am I advocating **true** overbooking? For the same reason weight-training coaches advocate working your muscles to failure point. So your muscles grow. Let me explain non-metaphorically.

True Overbooking

Before you can understand **why** you should overbook your time, you should understand **how** to do so. You can't do it once a year, where your time gets parceled out in 5-25% increments for a year at a time.

For weight training, you make decisions about how much to attempt to lift week-by-week. You need to be measuring your work at the same level of granularity using, say, the Allen-project. If you are measuring your work in units where "normal" is 50, and you add/drop/finish commitments 1 at a time, perhaps 1 a week, your internal water-level is varying around 2% at a time, with every change in your set of commitments. That's airplane-seat level or weight-training level of granularity. Between 72 and 73, your mental muscles may give out.

So here's how you overbook yourself -- within the umbrella scope of your larger formal/nominal projects, take on commitments continuously, at this micro-level of granularity. When you hit overflow conditions, start optimizing by **dropping** commitments strategically and **optimizing** your workflows to get back under control, and then driving towards overload **again**. This means you need to view a **lot** of your commitments as contingent. But then, isn't your whole life contingent? Wouldn't you drop everything if you had a heart attack?

Why overbook? Because that's the only way you'll pick a set of high-value opportunities to work on that match your strengths and present disproportionately high amounts of leverage, in terms of value to be won. Nobody knows their strengths at the level of detail where they can easily predict whether or not they'll like something without actually trying to do it. It is also the only way you'll work to capacity, since overflow is the only event you can detect

using your mind's own feedback mechanisms.

Dropping Commitments Strategically

Overbooking to brain-muscle failure is all well and good, but that brings up the issue that most people hate: what to drop. Here are two heuristics that help:

Seth Godin's heuristic: applies the [principle of The Dip](#): every project/commitment goes through easy early wins, a long valley of darkness, and then true returns. The valley is The Dip. If you're going to quit, quit before the dip. Quitting during is bad waste of sunk costs.

Drop the Drag: Productivity **feels** like movement. [Movement has a feel of momentum](#) at the "overall life" level, quite apart from movement towards specific goals. Even if you don't know what your life goal **is**, you can tell what is slowing you down and what is accelerating you towards it. Ask yourself, **is this commitment slowing me down overall?** If yes, that's a candidate for being dropped.

A metaphor I personally like: psychic acceleration/deceleration are absolutely detectable in the Einstein General Relativity sense, independent of where you are in a spatial frame where a "goal" is defined.

I especially love the drop-the-drag heuristic. It is **only** movement that creates drag, and it is **only** drag that can send you clear signals on what to prioritize. If you ever meet someone who says they don't know what they can drop, it means they are pretending to work on too many things. If they were actually moving, they'd know by the drag. I'll write a piece just about drop-the-drag soon.

A philosophical point: Overbooking is **especially** important for those who are looking for a purpose in life. This is because it is **way** easier to find a purpose for your life by overbooking to failure and systematically **shedding** things that are not your purpose. Negative definition works. At least if you are good-humored enough to only look for your life's purpose a couple of years at a time. I still don't know what I want to be when I grow up, but I am good till 2011.

Optimizing via the Trash Compactor Principle

Many people don't seem to get a basic fact about productivity "systems." Even when they work (like Allen's GTD), they come with an implementation and maintenance cost. If the **content** of your life and work isn't valuable enough to carry the overhead of a productivity system, you won't pay it. If you aren't moving or are going nowhere, it doesn't matter how efficiently you do it.

This gives you the other way to recover from overflow conditions, after you've pushed yourself there. Overflow conditions (brain-muscle failure) show that you are actually in motion, and indicate that **investing in productivity will now be a smart investment**. Your hopper is full enough that any fat-cutting will pay dividends by effectively **increasing** your bandwidth by moving your overflow point **higher**.

I call this the trash compactor principle. Unstructured work is like trash. It overflows relatively quickly. Optimizing and structuring your work is like trash compaction: it creates more room at the top.

Applying productivity systems without work content already flowing through your pipeline in inefficient ways is like attempting to compact an empty trash can. Optimizing before you need to is pointless work. Overflow first.

There was a time in my life when things were simple enough that I wouldn't have know what to put on a to-do list. Ah, nostalgia!

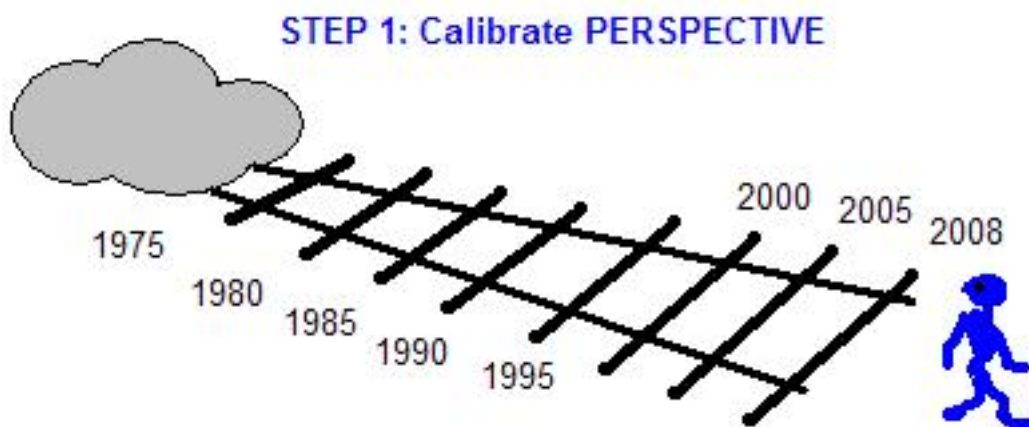
How to Make New Year's Calibrations

By: Venkat on December 15, 2008

You read that right. Calibrations, not resolutions. Until you know a) exactly where you are, b) where you are already going, b) with how much momentum, c) and how much discretionary steering authority, resolutions are just rituals. For New Year's party drunkards. You, of course, are a paragon of follow-through, but forward this to all those friends of yours who clearly need help. It's an illustrated five-step program. If you start right now, you might actually be ready to make real resolutions by first-drink-time on December 31st.

Step 1: Calibrate PERSPECTIVE

Resolutions are supposed to be significant, even lofty, life-course-changing intentions. The only way you'll know what counts as significant for you is to look back as far as you can, until your memories vanish into the foggy cloud of babyhood. For me, that means November 13, 1974 foggily, late 1975 practically.



HOW: take a single sheet of paper and title it **Perspective Calibration Scale**. If you are over 30, draw a line down the middle to create a two-column blank. Now list every truly significant turning-point event in your life (should be roughly 1 per year on average). Include big 'road not taken' regrets as well as stuff that just happened to you that you didn't drive. Do this systematically starting with the year you were born. This is easy, because if it was truly significant, the main symptom is that you remember it. If your list runs over 1 page, you are dragging in insignificant crap. Now, find the **most** significant event on the list and put a rank of 10 next to it. Put a 1 next to the least significant one, and a 5 next to one of the middle-y ones. Done? Now put a rank number next to all the rest.

Your perspective is calibrated. When you make your 2009 resolutions on Jan 1, you'll know by comparison whether you are setting a modest level 3 intention, or "most significant yet" 12-pointer.

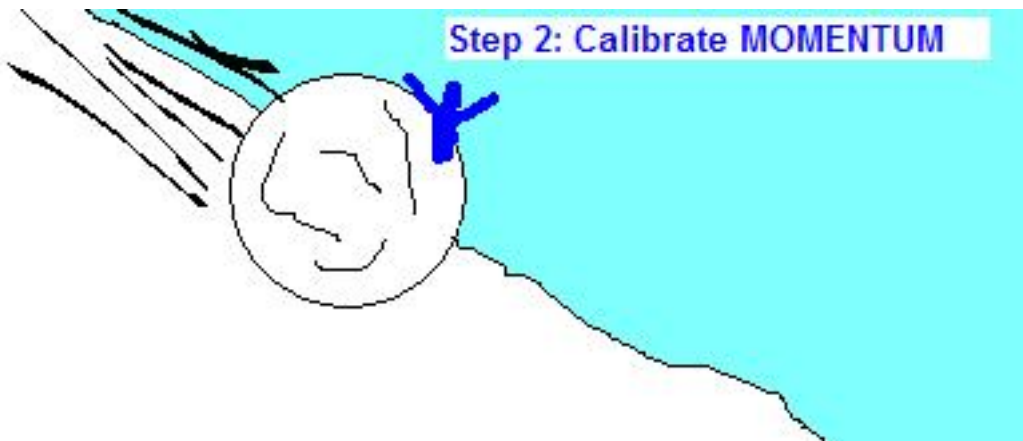
Grab a manila folder. Label the tab **Resolution Prep**. Put your perspective calibration sheet

in it.



Step 2: Calibrate MOMENTUM

Your resolutions don't have a snowball's chance in hell if you don't get yourself aware of everything already in your life that is, well, snowballing away. It's called momentum, and it's what makes steering difficult. The holiday break will naturally cause a pause in all your existing activities, which will give you a good opportunity to measure it. Maybe that's why the New Year's resolutions tradition started. In this step, you will define what it means to "hit the ground running in January," thereby naturally measuring momentum.



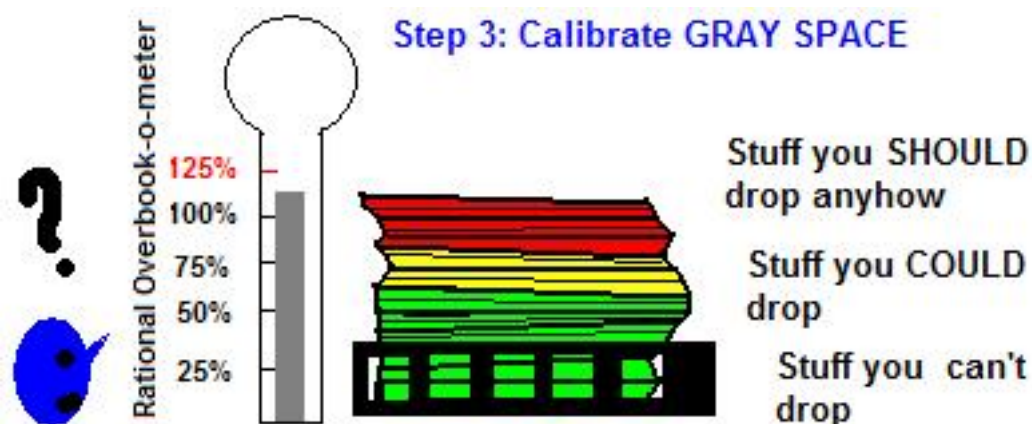
HOW: Take another sheet of paper and title it **Momentum**. List the **FIRST** concrete action you will need to take to restart/start all of your continuing/known-new activities in January. Write small. If you count all moderately significant activities that have more than 2-3 actions left to finish, you should end up with about 20-30. For extra credit, take an hour to lock-in your January commitments as much as possible in concrete ways. For me, this meant scheduling my critical January meetings now, creating Powerpoint templates for some presentations I have to do, and quickie back-of-the-envelope placeholder project plans for my stuff.

Advanced tip: if you use a more sophisticated system like [GTD](#) (David Allen's "Getting Things Done"), you may want to attempt a more comprehensive mind-sweep and update of your GTD lists, and recalibrate the way I described in my article [How to measure information work](#). If you are good at the GTD sweep, you'll capture more than amateurs will, and end up with a seriously cathartic 50-70 item list. For GTD'ers, **Momentum** is really just a subset of the 'Projects' list.

Put this list in your manila folder.

Step 3: Calibrate GRAY SPACE

You have all the spare bandwidth to execute on your intentions right? Yeah, right. If you are normal, you are already overbooked for 2009, and this is a good thing, [as I have argued before](#). As Parkinson's law says, work expands to fill the resources available, and you are currently in this state. The bad news is this: there is no obvious "spare" whitespace time in 2009 for you to fill in with execution of noble resolutions ("June-July: write novel" anyone?). The good news is that there is plenty of gray-space stuff. Stuff that expanded because you were dumb enough to let it. Stuff that can be delegated, dropped, wriggled-out-of, scaled down, simplified or superseded by a higher priority. You can trash-compact your way back to some serious available bandwidth if you are bloody-minded enough.



HOW: Look through every item in the **momentum** sheet, and give it a ranking according to the scale in your **perspective calibration scale**. Next, guesstimate the level you think you might be shooting for in your resolutions list, say 8. Make a note on the margin of the **momentum** sheet saying: "2009 target level: 8." For anything on **Momentum** that you marked less than an 8, try to note down next to it what it would take to get rid of the activity. Delegation, cold-turkey-stopping, hiring, firing, setting a building on fire. Whatever. Now you have stuff to bump to make room for stuff you want to do. You don't need to figure out how to drop the activity instantly on Jan 1. You just need to know that it **is** dispensable, if you could find a way. If you are trying to create a month of room to start a new novel in 2009, you're probably good to go if you are able to maneuver a significant delegation by October 2009. So you have time.

This step generated no new sheets of paper. Put your sheets back into the manila folder.

Step 4: Calibrate your FOLLOW-THROUGH

Unless you are a completely flaky moron or a certifiable obsessive-compulsive, you probably have good follow-through in some areas, bad follow-through in others. If you want an easy-wins year, you'll want to pick resolutions in your strong follow-through areas. If you are up for a challenge, you'll take on resolutions that involve behavioral challenges. You need to know which is which.

Step 4: Calibrate FOLLOW THROUGH



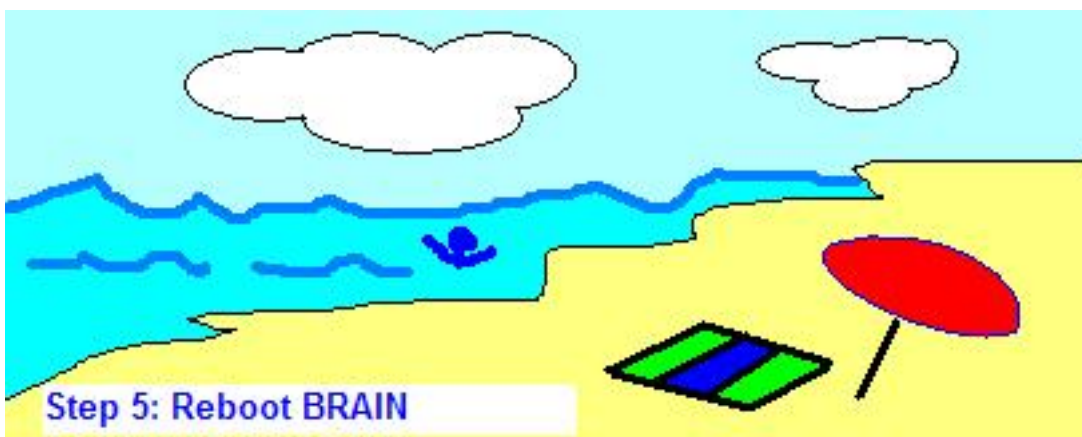
Trash can of resolutions past

HOW: Look back at your **perspective calibration scale** list. With a different colored pen or a highlighter, mark out those of your significant events that came about because you intended them to. You have your 'good follow through' evidence areas. Your failures probably didn't make the list of significant turning points because failures typically keep you in a rut rather than cause course changes. So on a separate sheet of paper, which you will title **failed resolutions**, list as many execution failures as you can think of. The easiest place to look is past failed New Year's resolutions. But look elsewhere as well. Focus only on failures of your own follow-through, not stuff that crashed through acts of nature. For both your **perspective calibration scale** list and your new **failed resolutions** list, put **easy**, **medium** or **hard** next to each item.

I am teaching calibration here, so I don't care whether you use this list to challenge yourself or pick easy wins. Do whatever. For the record, my biggest follow-through failures have been around intents to exercise. Yeah, that makes me average. The most visible broken resolutions in the world are unused February gym memberships.

Step 5: Reboot brain

Take a real vacation, either before, after, or (recommended) instead-of, extended-family. Your previous steps of calibration will **nearly** have prepared you to do so, but calibration is not closure. If you really want a relaxed vacation, first use whatever project management or ad-hoc methods you use to clear the decks as completely as you can. Create a real-and-expanded "hit the ground running list" from your **Momentum** list. Turn off the gas. Arrange for a cat-sitter/plant-waterer. Bring down the curtain forcefully on 2008. Really put it behind you. Your brain-rebooting vacation will ideally occur in temporal limbo between psychological-2008 and psychological-2009.



HOW: You really need me to tell you?? Sigh! Get away. Defragment hard-drive. Do physical activity stuff. Drink pina coladas. Read mystery novels. Discover a new muscle. Take a boxing lesson. Scuba dive with sharks. Subtle suggestions: go nature, not culture; make it a **do-something-else** vacation rather than a lay-around vacation. Idle bodies make for minds that wander back to your commitments, no matter how neatly you wrapped them up. Mind-clearing is for monks. Displacement for the rest of us.

I am off to the US Virgin Islands for a few days. If you can't afford a real vacation or have been laid off or something, take a mini-vacation nearby. A change of scenery, physical to-fro travel, and distance from extended family are absolute musts. Go camp in a truck stop for a weekend if you must.

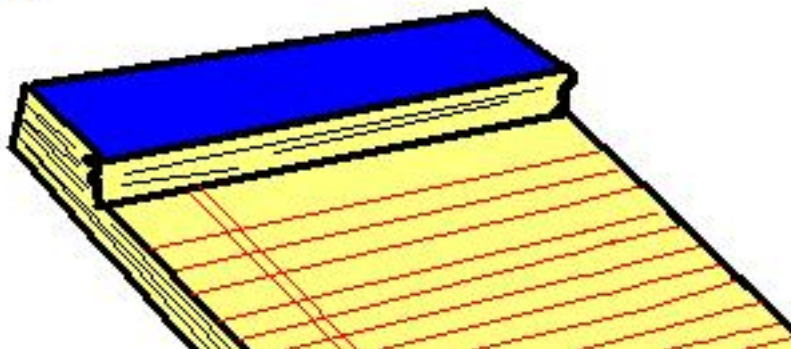
Don't skip this step. Without it, the rest is useless. Steps 1-4 recalibrate your conscious, aware and rational brain. Step 5 recalibrates your subconscious and emotional machinery by letting the dust of 2008 settle.

Get, Set, Resolve

On December 31st, pull out your manila folder, review silently for 15 minutes, set aside, take a short walk to let situation awareness soak in. Then get, set, resolve. I don't want to presume to tell you **what** to resolve, but try and list (on paper of course; well known that mental resolutions fail more easily) a concrete next-step that you can take in January, next to whatever lofty verbiage you choose for the main resolution. Example: "Be nicer to people (first step, resist first urge to bark at wife in January)"

Last clever tip: you may want to list twice as many resolutions as you think you can handle on January 1st. Then on January 31, cleverly drop the half that seem ill-formulated or just ain't going to happen. You'll be able to tell -- it'll be the half where you haven't taken even the first step.

Get. set Resolve!



If you try this and it works (or not), post how you did as a comment in January. Happy Resolutioning! As a reminder, here are the five steps again:

- Step 1: Calibrate PERSPECTIVE
- Step 2: Calibrate MOMENTUM
- Step 3: Calibrate GRAY SPACE
- Step 4: Calibrate your FOLLOW-THROUGH
- Step 5: Reboot brain

And remember to forward this article to those friends of yours! Am trying to make this post go viral :)

Added 12/17/08: Great way to keep yourself on track: schedule focused emails to be sent to yourself at www.futureme.org; make 'em specific questions like "Have you lost 5 lbs yet?" and not too frequent (like once every 3-6 months).

Theory W, Theory X and Theory Y

By: Venkat on June 22, 2008

For real estate agents, it is **location, location, location**. For businesses, it is **talent, talent, talent**. Neither of Douglas McGregor's classic pair, [Theory X and Theory Y](#), works anymore, and neither does any clever combination thereof. Whether you are a [free agent](#), or a manager in a larger company, your ability to understand and orchestrate your corner of the talent economy will make or break you and your company. Kicking and screaming, anybody with half a brain has accepted that the "[fungible headcount](#)" mental model must necessarily be replaced with a "people are unique" mental model. But this uplifting let's-all-self-actualize [strengths message](#) has brought with it the demanding task of mass-customized management, all in the face of revolving-door dynamics. In this series, I offer up the outlines of a new beta theory, Theory W, that I hope will help, and which you'll have to help me finish.

Theory W

Theory W is a nice name for the theory of talent management I am starting to make up. It follows the same algebraic-unknown nomenclature scheme of Theory X and Theory Y that suggests that we'll never **really** know the whole answer. It also suggests, by being a precursor to X and Y in the alphabet, that we are talking about a theory that is more fundamental. Finally, W is a nice letter that could stand for "Wikinomics," "We," "Work," or "World," all of which are fine connotations for the theory I am about to describe.

I'll describe it in detail in the next post (remember to subscribe to the RSS feed to get alerted). In this post, I'll talk about why existing models of talent management have been undermined to the point that they are completely unworkable today. Besides X and Y, there are no less than **nine** schools of thought that I've been able to find, in researching this topic, which together probably account for 80% of the managerial behavior out there. These theories drive actions in all aspects of talent management - acquisition, retention, turnover-management and development, and apply to managing people down, up or sideways, within corporate walls or "outside" in your ecosystem.

None of them work today, but it is important to start by understanding them.

The Nine Undermined Models of Talent Management

There is a reason why I didn't call this list the nine **myths** of talent management. Each of these theories has a real germ of truth within it, that makes it at least slightly true under all conditions. Each also has a sweet spot that makes it **strongly** true under restricted conditions.

And that's why there is a crisis in talent management -- today's conditions are not a sweet

spot for any extant theory, and their limited 'always true' elements are not sufficient to navigate by.

1. Theory X:

High concept: "people hate work, and if they can slack off, they will." This theory arises from classical Western tragic/conservative philosophy which views humans as fundamentally flawed. It was **practically** true for a long time, even if not psychologically true. It is only recently in history that enough non-crappy work has been created that significant numbers can (and therefore do) aspire to it.

Why it is being undermined: no, managers haven't figured out how to make everybody love work, or make all work lovable, but theory X cannot even continue on life support anymore. The new economy enables and incentivizes a much more rapid and hopeless grass-is-greener wanderlust among employees. Operate by Theory X and people will simply leave in the forlorn hope of finding something better. An economy consisting of a flow of unhappy people trudging through revolving doors is only slightly better for all than one where they stay put in quiet desperation, and worse for the X-firms.

2. Theory Y:

High concept: "people love work, and self-actualize through it; help them build on their strengths and grow." This theory descends from Maslow and is today represented by the [strengths movement](#).

Why it is being undermined: it does not tell you how to decide **if** it is possible at all to align the optimal growth directions of an individual and an organization (or two individuals in the free-agent economy), and **how** to do so when it is possible. In its more dangerous manifestations, Theory Y sticks its head in the sand and asserts that alignment is **always** possible. It is more a [reflection of wishful-thinking Boomer ideology](#) than reality.

3. Theory Z:

High concept: "the Nanny Corporation." This theory, which attempted to capture the differentiating elements of Japanese life-time employment models with respect to X and Y, operates on the idea that corporations can use their vast resources to sufficiently satisfy individual non-work aspirations to stem attrition. If this seems laughably paternalistic/maternalistic or Asian-only, check out the recent [The Dream Manager](#), which suggests via an American parable, the creation of a Chief Dream Manager position to help employees reach for their dreams. Or think of the famous Google Buffet.

Why it is being undermined: Theory Z, besides making anybody with the slightest individualistic spark (such as us Gen X'ers) throw up, vastly overestimates what corporations can realistically provide by way of incentive structures. It is presumptuous to think corporations can actually help employees enough with their dreams to solve the talent problem. I am not saying corporations can't help at all, but they cannot help **enough**.

4. The Only-the-Best Theory

High concept: "Good people working with a bad process will beat bad people working with a good process every time." I recently had a chance to ask a (**very very**) famous manager, now retired, about how he achieved his phenomenal successes, and was disappointed to get the 'hire-only-the-best' theory. The philosophy is driven by the somewhat arrogant "try to hire people smarter than yourself" heuristic.

Why it is being undermined: The theory actually isn't subtle at all, and the most obvious problem kills it -- at any given time, only a tiny percentage of people/companies will have the

"It" factor, or the burnable money to attract the best and pursue an "only the best" strategy. What are the rest supposed to do? Eat cake? There are also more basic problems around [recognizing people smarter than yourself](#). If you cannot get good work out of less-than-genius level people, you will never get started, and the economy wouldn't function.

[5. The Team-on-a-Bus Theory](#)

High concept: "Get the right people on the bus, the wrong people off the bus, and then decide where to go." This theory, related to 'Only the best,' has its roots in the [the classic work on teams](#) by Katzenbach, as well as the ideas in [Good to Great](#). Of all the theories in this list, this is probably the most sophisticated one today, and acknowledges the conflict between pre-defined goals and talent.

Why it is being undermined: Three reasons. First, it is only in rare windows of opportunity that you have the luxury of choosing objectives to suit a team. In most real situations, you have to work towards existing high-sunk-cost goals of greater or lesser definition. Second, the high-performing, high-chemistry team of people with beautifully-matched strengths is much too rare to drive the bulk of everyday work. Third: every successful effort eventually needs to scale, and the more people you need, the less picky you can be about fit and chemistry.

[6. The Radical Individualism Theory](#)

High concept: "The firm is dead; everybody go solo." This is a highly seductive theory, and I was enamored of it for quite a while. Historically, employment by large, organized firms is something of an anomaly. Freelance labor was gradually displaced by wage labor between the 1870s and the 1980s, after which, in a startling reversal [chronicled by Dan Pink](#), it started making a comeback. Reading "**should** happen" into limited "**is happening**" data is supported by ideas from [Coase economics](#), that suggests that lowered economic transaction costs should cause the firm to shrink. Taken to its absurd limit, you might imagine that the talent problem simply goes away if everybody is a free agent in a frictionless Darwinian economy.

Why it is being undermined: Even if everybody had entrepreneurial strengths, outside a very narrow range of largely self-contained economic roles (such as writers and artists), free agents are no more free from the talent wars than firms. You still need to enmesh yourself in a community of talent to be the best you can be, whether or not that community is a formal firm. Worse, while there are fundamental economic forces creating a [long tail](#) labor market of free agents, other forces are making large firms stronger than ever, perhaps presaging an age of mega-firms. That's a story for another day. Worst of all, this theory sometimes shows up in the form of a specious fire-your-boss models, vacuous personal-brand models, or immoral pyramid schemes (such as the model in [The 4-Hour Workweek](#)).

[Seven: The Kool-Aid Theory](#)

High-concept: "Create a bandwagon everybody wants to ride on." The most graphic demonstration I've seen of this is a [famous goodbye email from Justin Rosenstein](#), who left Google for Facebook ("Facebook really is That company...I'm serious. I have drunk from the kool-aid, and it is delicious.").

Why it is being undermined: Besides the obvious problem that there can't be too many "It" companies at any given time, Kool-aid Talent Economics is bad for companies and individuals and worse for the global economy. Kool-Aid companies suffer from the Sons-of-eBay effect, where high-growth and a young and exciting culture attracts too many smart but naive people who eventually spin-off as entrepreneurs due to the frustrations of a strengths-unbalanced pipeline. You don't hear about it until growth slows and the "It"

company needs to control costs like everybody else and manage people more effectively. Non Kool-Aid companies with fantastic opportunities to offer suffer from artificial scarcity. The economy as a whole suffers because of suboptimal use of talent, and individuals suffer as they learn the perils of band-wagonism the hard way. "Be like Google" is not a theory. It is wishful thinking.

[Eight: Social-Darwinism](#)

High-concept: "If you can't attract talent you aren't fit to." This is a line of reasoning that supports doing nothing. It suggests taking the broad view that the Darwinian logic of the marketplace will allocate labor resources efficiently.

Why it is being undermined: Increasingly, we all recognize that the globalized world marketplace is **not** a pure Darwinian struggle. [Enough common issues now bind our destinies](#) -- ranging from global warming and terror to scarce oil and AIDS, that we have to figure out how to get beyond this impossible-problem framing. If we don't we are all doomed.

[Nine: Carrot-and-Stick](#)

High-concept: "It's called WORK for a reason." You'd think the prison-warden school of management was shut down long ago, but every once in a while, somebody will resurrect the theory of talent management that is simple, elegant and wrong -- put enough scary punishments in place to get minimal performance out of anybody, reward those who manage to exceed expectations amidst the misery. There is a homey [git 'r done](#) feel of cutting the bullshit to this philosophy that appeals to many. In subtler forms, you get over-simplistic management-by-parable models like the One-Minute Manager.

Why it is being undermined: This model hasn't had any credibility since the mid nineteenth century. It's the twenty-first century. The nature of organized work has been evolving for several centuries. If you really want to delude yourself that talent management, especially with information workers, is this simple, you probably shouldn't be in the talent management business.

So that's it for the roundup of existing theories. Next time, we'll talk about Theory W. Expect that post when you see it -- I'll try to get it out in the next couple of weeks.

How to Measure Information Work

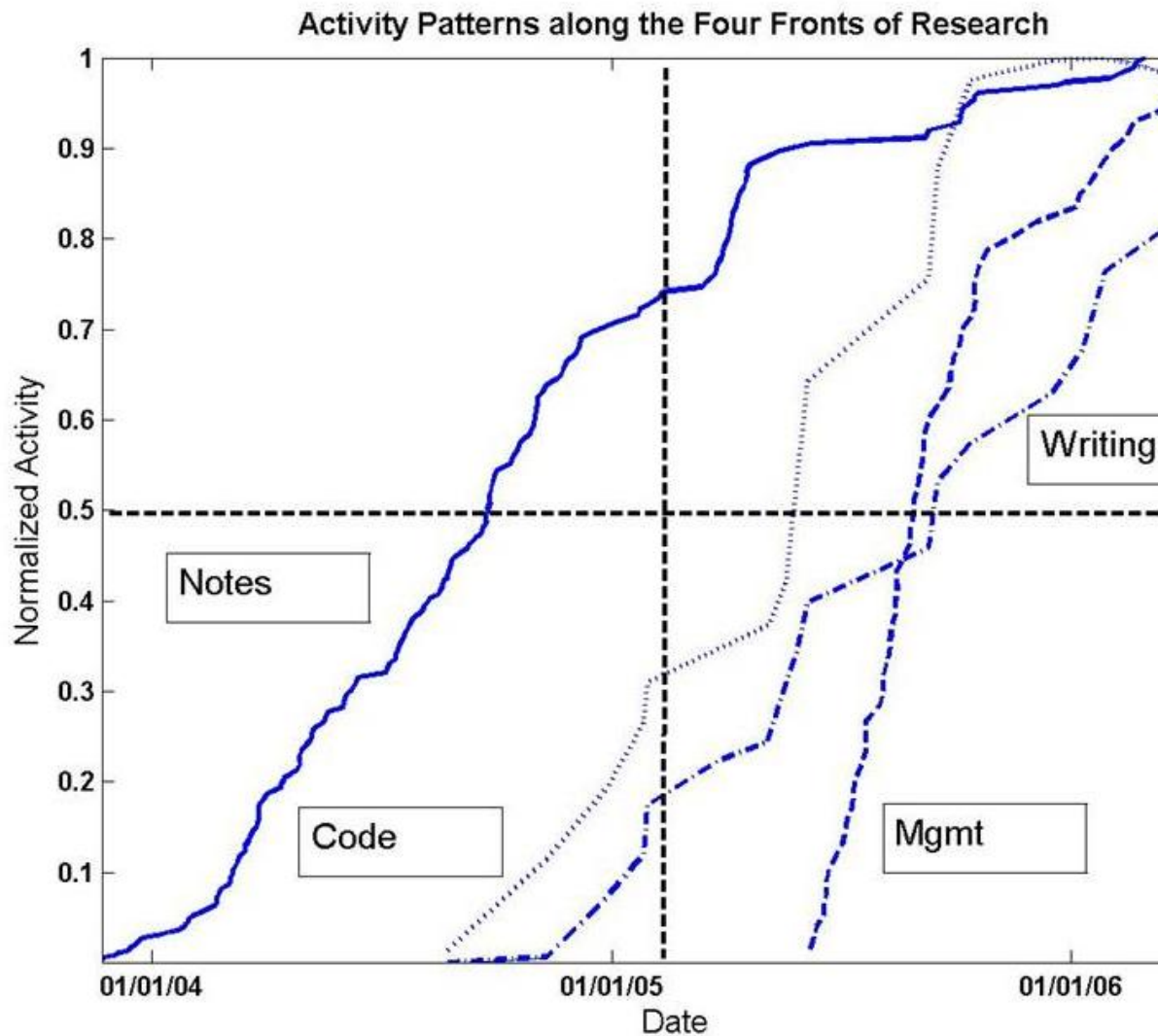
By: *Venkat* on September 11, 2008

Continuing my exploration of [information overload](#), in this piece, I'll further develop the argument that it is not the real problem, but a mis-framing of a different problem (call it X) that has nothing to do with "overload" of any sort. Most people who start their thinking with the "information overload" frame look outward at the information coming at them. One aspect of the **real** problem is terrible feedback control systems for looking **inward** at your work. On the feedback side of things, we measure capacity for work with the wrong metric (headcount, or in shorthand managerese, "HC"). I'll explain why HC is terrible at the end of this piece (and I've also written [a separate article on HC](#)).

So, can you measure information work? Yes. Here is a graph, based on real data, showing the **real** cumulative quantity of information work in my life during two years and some months of my life, between January 2004 and about March 2006.

[caption id="attachment_408" align="aligncenter" width="500" caption="Figure 1: Quantity of

work over one year".



[/caption]

Calibrating Work in the Raw

Figure 1 is all about calibrating your measurement systems. The first thing you've got to understand about measuring information work is that at the ground level, one size does **not** fit all. There are ways to abstract away from the specific nature of your work, which I'll get to, but you still need to understand it first. The measurement methods I'll talk about later rely on data artifacts generated by **meta-work** (stuff like to-do lists and calendars). But meta-stuff must be calibrated against what it talks about. A typical **next-step** in your life may be an hour long, while one in my life may be five minutes. You won't know until you look.

Every sort of information work transforms some sort of information artifact into some other sort of information artifact. Paul Erdos famously defined mathematics as the process of turning coffee into theorems, so in his case plotting gallons of coffee against number of theorems proved might have worked as a first pass.

My graph above reflects throughput patterns within **my** particular style of academic engineering research in modeling and simulation during **that** particular period (I was a postdoc at Cornell during this time). Coffee at **Stella's** in College Town got transformed into written notes. Notes got transformed, in this case, into computer code with which I ran

experiments, which produced data files. The data then got transformed to research output documents (papers and presentations). Here's how I measured this throughput, each artifact in its own unit, with the cumulative total at the end of the year normalized to 1:

NOTES: The cumulative number of pages in my research notes files. This is the best measure of "ideation" activity I could find.

CODE: The megabytes of code and data in my working programming folders. This is one coarse measure of the amount of actual "work" being accumulated in computing work (today, I'd use a code repository and count check-ins)

WRITING: The megabytes of working documentation in my computer "research" project folder. This measures the rate at which the "work" in 2 is being converted to completed output such as "papers" or "presentations"

MGMT: This graph shows the accumulation of workflow management collateral data, such as to-do lists. In this case, I was using a tweaked version of David Allen's Getting Things Done model (once the project got to a phase where I needed to get management overhead out of my head).

You can ponder the particular shape of the graph (clearly my research style that year followed a classic research pattern of ideation, unstructured execution, structured execution, rather heavy on front-end ideation -- I read and thought for almost 8 months before writing a line of code), but the broader points to take away are:

Calibrating flows of information work requires an ethnographer's eye for local detail and narrative, combined with a data-miner's enthusiasm for diving in and examining the concrete artifacts of information work.

You do have to actually look at real **data**, at least loosely. Sketching out graphs like the ones above hypothetically, based on your memory, or guessing based on how you **think** you work, measures your assumptions and biases, not your work.

Some people seem to have the discipline to maintain things like food diaries and other real-time journals of what they did. I don't, so I adopted a leave-footprints-and-backtrack model (saving dated copies of working computer folders, which I then data-mined manually). Whatever you do, occasionally, you need to go through some sort of calibration exercise to get a data-driven sense of what your work looks like at the ground level. Without your sense of your work grounded in reality, the meta-measurement systems I'll talk about won't work. You don't have to be as maniacally detailed as I was (I was doing this out of research curiosity, not because I am a [life-hacker](#)), but you do need to listen to your work.

Why Measurement Matters

In my [previous article](#) I used the metaphor of the Vegas buffet. Just because there is more food than you can eat, you don't **need** to overeat. You just need to eat enough to satisfy your needs. But people still do overeat, and Brian Wasnick provided the most compelling reason why in his account of the psychology of eating, [Mindless Eating](#): poor feedback control. On the measurement side, you overeat because you measure the wrong things (how much you have left on the plate for example, or whether your dinner companion has stopped eating). Let's apply the same logic to information.

Yesterday I had over a thousand articles in my Google Reader. Today I have none. I got to this insane level of information-processing productivity using the magic "Mark all as read" button.

The reason: I am currently "full." My throughput systems for all my projects are currently full

enough of goal-directed work flowing through, as well as maximum-capacity reactive work in response to opportunities/threats from competitors, that I have no bandwidth left for any more. Yes, a high-priority development **could** bump my top priority items off, but my stuff is currently at a critical enough level that I can take the calibrated risk of missing key information ([Black Swan](#) risks for downside, unprecedented opportunities for upside).

In other words, yeah, there might be a tray of chocolate cake I didn't spot in the buffet, and potentially, some **salmonella** in what I am already digesting, but there is little enough I can productively do about either that I can ignore the buffet.

From Calibration to Feedback: Measuring Meta Work Throughput

All information work is different, but information **meta**-work comes in surprisingly few varieties. By this, I mean collateral information that you use to keep track of your information work. The only condition is that you have to have **some** visible system. If it's all in your head, the only thing you can use is subjective self-assessment of mental stress on a scale of 1-10 (you can measure **that** using a rather heavy-weight technique called [experience sampling](#)). But if you have something even as basic as a to-do list, you can measure meta-work, which is much simpler than either measuring the contents of your head or your ground-level work.

Remember, this is only useful if you also have good calibration with respect to your ground-level work. Otherwise you won't be able to meaningfully understand your meta-work measurements. Note from Figure 1, that I only have measurement data for part of the period, when I was actually being structured in my work habits. In research, you tend to swing between more and less structure.

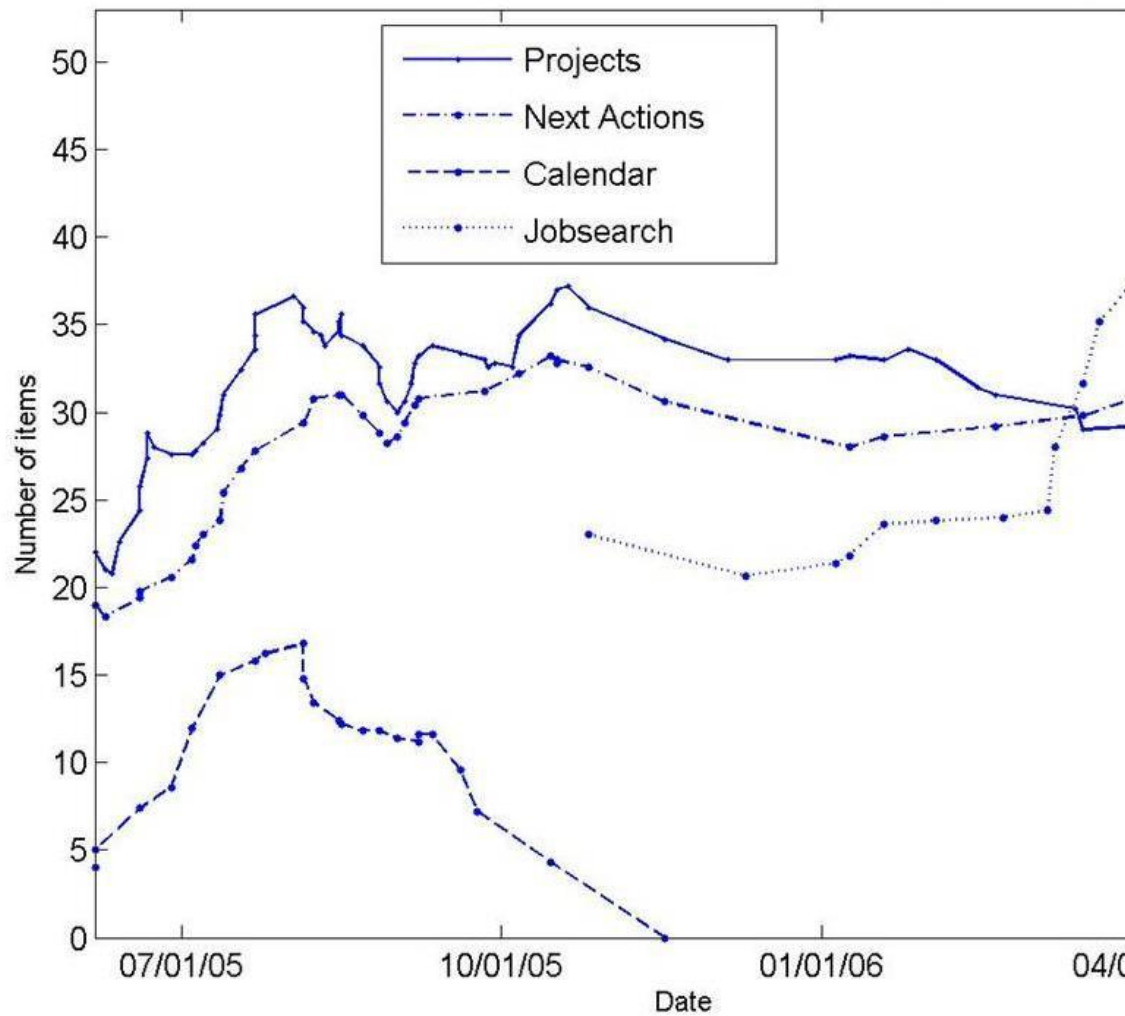
Like I said, meta-work comes in few varieties, and mostly uses the same artifacts: lists and calendars. During the organized part of my two odd years, I was using [GTD](#) in a fairly disciplined way, but you can do something like this with any reasonable system so long as it is plugged into enough of your life, and has some meaningful semantics (measuring your grocery shopping list length every week is obviously silly -- that's only a small part of your life).

For those who don't know much about GTD, all you need to know for the purposes of this article is that it involves several lists and a calendar. The lists including a **next-action** list at the lowest level, followed by lists at increasing levels of abstraction: a **project** list, something called a **someday/maybe** list, and something called an **areas of focus** list. The non-list artifact in the game is a calendar. I also had two special-purpose lists called **Job Search** and **Course** (for a course I was teaching for part of the time).

Here's what the action looked like (this is effectively a drill-down into the MGMT part of Figure 1.)

[caption id="attachment_409" align="aligncenter" width="500" caption="Figure 2: Meta-Work Trends for GTD system"]

Activity on the four major GTD lists over time (smoothed)



[/caption]

Here are some highlight points for you to ponder:

The number of next-actions stays fairly constant after an initial upswing as 'collection' habits become more efficient.

This coarse look at the data does not reveal 'task churn' - the addition and deletion of tasks, a typical list-re-edit changes something between one task to a third of the entire list.

Note that during the first half, calendar activity is present, but this vanishes in the second half. Like many full-time postdoctoral researchers, my "hard landscape" of calendered activities was mostly completely empty when I was not teaching. Barring meeting with students at scheduled times, I rarely had any time constraints. A busy MD's data would look **very** different, with a lot of calendar activity.

I got married on August 12, 2005 and moved into a new apartment on August 14 and 15 - the time coincides with the peak in calendar activity. Around that time, I was also submitting several papers to conferences and getting started with new students for Fall.

Note that the activity on both the Next Actions and Projects lists tails off in the second half, but a special list (my Job search list) is very active and growing

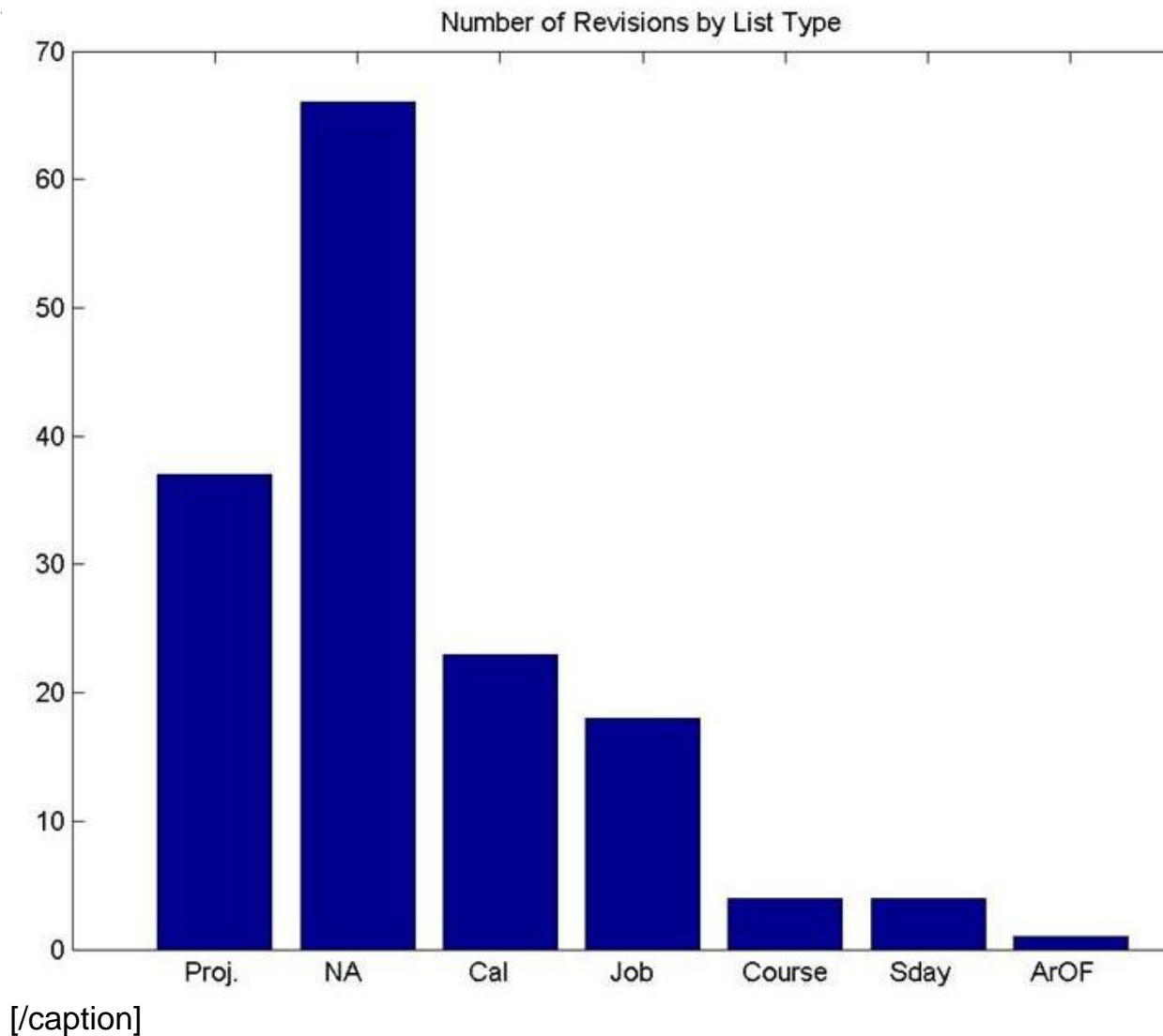
The key point to note is that this sort of measurement is **trivially** easy to do. I maintained all

my lists in my email, and whenever I made a change, I'd save the old list in a folder and email myself the new one, which stayed in my Inbox.

Understanding Churn

Churn in the meta-data of your life represents throughput at the ground level of your life. Here is one view of the churn from my data:

[caption id="attachment_410" align="aligncenter" width="500" caption="Figure 3. Measuring churn in your life"]



To understand how churn in your meta-data maps to productivity in your ground-level data, you need to analyze and interpret. In this case, you see the profile of a fairly healthy execution-oriented phase of my life, with very little questioning of Big Life Priorities. My Areas of Focus list (which is a high-level list containing stuff like "Work, Family, Health") barely got touched. I clearly was focused on the now rather than the future, since there was little daydreaming showing up as **someday/maybe**.

What might an analysis of an angsty teenager's life reveal? The meta-data you might have to look at there would be different, since angsty teenagers typically don't use organization systems. iTunes downloads (lots of death metal?) and books bought/checked out from libraries might work. Those might reveal deep questioning at fundamental levels. Cell phone bills and Facebook feeds would work today.

I got these graphs through some laborious data entry, going through all my saved historical lists, but for real-time feedback, most of the time you actually need very little information -- you just need to keep one eye on the length of your lists, another on the amount of churn, and the third (yes, we're going meta here, you'd better have a third eye like Siva) on whether your systems need recalibration with respect to your ground-level work.

Measurement, Control and Information Overload

Let's bump back up to the theme of information overload and how the idea of measuring your work relates to it.

The connection is simple. If you have a good, noise-free and accurate sense of what's going on with your work, in a throughput sense, you'll have a very accurate idea of how much information you need, of what sorts, and when.

This will give you the **confidence** to control the flow. You have always had the **ability** (ranging from the nuke/delete all/mark-all-as-read buttons, to more selective filtering tools), but it is the confidence and trust in your sense of the state of your work that will give you the courage to use the levers available to you. Focusing on the efficiency of filtration/recommendation systems is pointless -- the state of the art is good enough already in most ways. The real bottleneck is the inefficiency of measurement on the demand side.

Of course, this has been a story told around some selected highlights of a complex period of my life, so there is a lot I didn't tell you, but a word to the wise is sufficient. Look inward at your work-hunger before you look outward at the information buffet out there.

A Footnote on Headcount

Okay, I couldn't resist that bad pun. I promised to explain why headcount is a stupid way to measure capacity for information work (though it is a smart way of measuring some other stuff).

The answer is as old as Frederick Brook's [The Mythical Man Month](#), the classic about managing programming projects. Programming is the prototypical type of individual-level information work. Brooks noted that unlike in manufacturing, adding headcount to a delayed software project delays it further, rather than speeding it up, as a naive "headcount" model might suggest. In software, it actually makes more sense to ask at an individual level whether potential new team members will speed things up or slow things down.

What's happening here, and why do we still use HC? The specific reason in programming generalizes. Software people know that a good developer will outperform a mediocre one by **orders** of magnitude, so the "interchangeable parts" idea fails a basic sanity test. The other reason is that information work is so collaborative and creative that more people adds more interactions, and much of the complexity lies in managing interactions, and the extra contributions must first work off that interaction overload deficit.

So why do we still use HC in corporate capacity planning around information work, besides force of habit from the manufacturing era?

The answer is simple -- HC isn't used for planning at all. It is used for signaling priorities and formal assignment. If I tell you that you are 50% on two projects, that is actually just a signal telling you that your output on both fronts better be comparable in magnitude, and that your overall performance had better be at least average, compared to your peers. Effort fractions

work better for doing this than simply saying **you are on these three projects in this order of priority**, because it signals how abstract priority translates to value delivery expected.

Used this way, HC has nothing to do with the content of work and how long it might take to do it. I talked about this sort of stuff at length in a [previous piece on talent management](#). You and I can't fix corporate management systems overnight, so what can you do to manage capacity and commitment levels? That's the control story, which I'll get to one of these days.