

Hey there. Thanks for tuning in. This is going to be a little case study where I walk you through the systems that I use every day to make sure my life and my business are working as efficiently as possible.

As we go through, you'll see that some of them are extremely detailed and organized while others are more barebones or less-refined.

There's a few reasons for that. First, some of them are old and some are new. The older ones have had many revisions and lots of refinement to get to where they are now. And the newer ones haven't been through all those tweaks yet.

Like I tried to teach you in the course, I always start with the least amount of detail that I can get away with. That way, I actually build something quickly and get a chance to test it out.

Another reason for the difference is that some of my systems get used all day every day, and others get used less frequently. The more I use a system, the more I refine it because little things that annoy me build up and I engineer them out of the workflow.

For less frequently used systems, I don't always do that because, well, I never get bothered enough to worry about it.

And one more reminder before we get started: none of this perfect. I frequently feel like my systems could be better or more useful or more automated or whatever. And sometimes they break down. I'll have a bad day or a bad week. Maybe even a bad month, and I'll abandon a system or get lazy.

That happens to me too! I have all the same struggles that my students do. But I still love my systems because, when things get difficult, I can always fall back on them and use them to get myself back on track.

It's like forgetting how to ride a bike and having a pair of training wheels handy to build your confidence back up again.

So, don't necessarily look at what I've built and think you need to copy it or do things exactly like I do. I simply do what works for me. And my hope is that by seeing how some of my most useful systems work, you'll get some ideas for things to try with your own.

So, let's go ahead and get started!

What you're looking at right now is the homepage for a project management app called Trello. There are lots of apps like it. Some that do more and some that do less. Trello is the one that I've chosen to use as my command center.

So, why did I choose Trello as my "command center?"

Well, honestly, I started using it before all the other fancy programs came along. I started moving my systems into Trello years ago when it was brand new and it was the best option.

If I'm being perfectly honest, I don't actually know that it's the best anymore. There's so much competition in this space now. But it was the best for me at the time—I really liked how it worked, and it still works for me now, so I haven't really investigated the newer options.

If you're just getting started organizing your own systems, you may choose something else that works better for you.

Honestly, though, the main reasons I like Trello are because it's incredibly simple, the UI and UX are absolutely top notch and, best of all, it's free.

Most project management tools have pages and pages of features that you can compare. But, realistically, only a few of them really matter and when it comes down to choosing one, you just try out a few and see which one clicks with you the most.

At the end of the day, they're all kind of the same.

I like Trello because it's simple. It's a series of kanban boards that you can organize and share however you like. Given the option, I tend to over-organize, so I like the fact that Trello has resisted the urge to add too many layers of complexity for me to get lost in. It forces me to focus on what's really important—which is making sure I actually use my systems.

And, like I said, the user interface and experience is top notch. They really thought through how to show you just the details you need to see on each screen and it's incredibly easy to get to anywhere from anywhere in just a click or two.

You can also do most of everything you need with a few keyboard shortcuts. I've memorized the ones I need and it makes updating and changing my systems really fast, which is important to me.

And I really like how they've implemented features. Over the years, Trello has incorporated all kinds of advanced features, but you only ever see them if you enable

them. I don't need most of them, so I just never enable them and I never have to look at them or sort through them.

At any given time, the only things I see are the things I use, and that's really great. I hate the clutter that comes with too many features.

So, if you can't tell, I love Trello. It works the way my brain likes to work. This isn't a big promotion for Trello, though. Like I said, it's free to use. You can pay for a bunch of fancy features that don't come with the free version but I never have.

In fact, I love Trello so much that I've tried paying them for it, but I just ended up paying for stuff I didn't need, so I stopped. They're a huge company and make their money from enterprise businesses, so I guess they don't need me to pay them. I'm perfectly happy with the free version.

I tend to work either by myself or on small teams, and I find the way that Trello does collaboration works well for me. It's easy to send and receive notifications and assign yourself or other people to different tasks and track where things are at and who's working on what at any given time.

Trello is also really flexible. It's such a simple system, but you can kind of mold it into whatever you need to be. No two systems are perfectly alike, so it's nice that I can have one system that uses one set of features or works one way, and another that's different, and it can all live together in one place so I don't have to go looking for information in different places.

They also have really well-done native apps for most operating systems, which I rely heavily on.

Anyway, enough about Trello. Let's talk about *how* I actually use it.

If you take a look at my dashboard, you can see pretty quickly how I organize myself. Now, this isn't *all* my systems—I have lots of small routines that just never made their way here because they don't need that level of treatment. And there are also plenty of one-off projects that were here for awhile, but are no complete and have been archived.

So, on that note, I use Trello for both ongoing and one-off systems. And some hybrids, too.

At this point in time, I've boiled everything down into two categories: my private life and my work—which is mostly Riskology.

I have some other systems for business projects I share with other people here as well, but these are the ones I control myself. Here's a quick preview of what they are.

The two starred boards at the top are my daily tasks and my annual plan for this year. These are the boards I *live* in. I'm in my daily tasks board literally all day long making sure I'm staying on task, and I'm looking at my annual plan board a few times per week to make sure the right projects are making it into my daily tasks board at the right times.

I'll give you a little tour of those in a moment. And if you've gone through the course module on maintenance and how to do the different reviews I recommend, you'll see how I'm using that framework here.

You can see in my Personal Boards that I have a home improvement board as well. My wife and I bought a mid century house a few years ago, and that thing keeps me busy, so I organize all my DIY and improvement projects there and make sure I'm keeping up with all the maintenance I need to do.

And then you can see that most of my boards are business boards. My team at Riskology is really small—just 3 of us and I'm the only one who works full time—and creating these systems and pieces of documentation is the best thing I've ever done to keep us all in sync and producing really high quality work consistently.

We used to have to do so much chatting just to keep up, and we're all in different time zones, so it really slowed us down. So, these are the systems that help me and my team work better.

This doesn't just apply to small teams, though. I've used Trello with really big ones, as well, like when I was organizing world record attempts for The World Domination Summit. We had dozens of people and over 100 volunteers working on those projects, and I organized most of it right here in Trello.

Anyway, let's go ahead and take a look at some of these so you can see how they work, and then see how they all work *together*.

And let's go ahead and start with the Riskology editorial command center because that's one of the most important systems we've built for the business.

As you probably know, Riskology—as a business—is built on content. And we've grown it to the reputation it has today using this system.

I talked about this system in the course and used it as an example here and there, but now you can get an idea of how it actually works.

There are a number of steps to this process and, as you can sort of tell—and this is the case with most of my systems and just kanban boards in general—each card is an article... or at least an idea for an article and it moves from left to right through the different stages of completion.

So, let's see here. The major stages of this system are ideation—that's the very first list you see here—research, writing, editing and graphics, and scheduling. You can see some more lists there, and I'll explain those in a minute.

So, this system doesn't really work unless there's something in that first column, right? So first up, we have to make sure we've got some ideas to work with.

As you can see, we have plenty. In fact, I'm regularly removing and deleting ideas just to keep the list manageable! These days, I have a lot more ideas than I have time to execute on, so this list is always just growing and growing.

Whenever I get an idea for something I want to write, I create a new card in this list and throw in a little description and a few bullet points about what I'm thinking so that, whenever I come back to it, I'll remember what I was thinking.

Let's see, here's one about being an inspiring person. What was I thinking there? You can see I wrote a couple sentences to get the gist of the idea down and then a few more about some story about Robocop from my childhood or something. This is an old one I still haven't written. Guess I still haven't figured out the whole inspiration thing yet!

Now, once we decide to move forward with an article, that triggers a number of steps that are all guided by a series of procedures—with plenty of room for creativity, of course—to make sure that the finished product is really polished. We want to make sure that it's super helpful and that people feel like reading it was worth their time.

We put a ton of effort into our work, so we want a big payoff, and all these steps are what help us get that payoff every time.

I won't spend a ton of time going over every little detail because you probably don't care that much about the nitty gritty and we'd be here for a very long time, but here's the gist of it.

Once we decide to move forward with an article, it flows through these different lists. And having all this in one place allows us to manage multiple projects at one time without losing track or letting quality slip.

The first stage is research. That just means going and gathering all the information we're going to need in order to create whatever we want to publish.

If it's an article I'm writing, I'll do that step myself. Sometimes, to spread the load, I'll have someone help me. You can leave comments on a card, and we'll simply add all our sources to a comment—organized by the type of source material—until we feel comfortable that we have everything we need to create the article.

If you look over here, I have a column for checklists. This one is the master list for all the steps that need to happen to create and publish an article on Riskology. There are 41 steps, but I'm always adding and removing little bits based on how our writing goals evolve.

This checklist gets added to an article card once it enters the writing stage which, of course, is the next step in the process. And that list sort of controls whether or not the card can progress to the next stage.

It shouldn't move forward until all the items for that section of the checklist are completed. And once they *are* completed, then it's obvious that it's time to move to the next step.

Once all the writing is done, the article moves to editing and graphics. Sometimes I hire out the drawings and illustrations for an article if I want them to convey something I don't think I have the skills to execute well or if I don't have time.

I do love making little drawings, though, so sometimes I do it myself. In either case, once an article is to this stage, we can start working on the next one because the heavy lifting of the creation process is done.

And after that, the article just needs to be scheduled for publishing and sent to our email list before moving onto the republishing process where we work with other platforms to promote our articles to their audiences. That's the very last step on the checklist, and it has its own board because it has its own process separate from publishing.

The real driver of quality and consistency here is that publishing checklist. That checklist follows every article and we don't publish until it's been completed.

But it's not just the checklist. If you look over here, all the way at the end of the lists, I have one final column for guidelines.

All of these cards are the nitty gritty details of *how* to do the stuff on the checklist. The checklist is just a list of steps, but it's important for quality and consistency that the steps are completed in a similar fashion for every article, even if different people are working on them.

So, when someone is doing the pre-writing steps for an article, they'll follow all the guidelines in the pre-writing guidelines card. There's a quick overview, and then there are more steps that explain how to do each thing involved in the pre-writing process.

Here's another one. During the research phase, I like to increase the authority of our writing by getting input from experts in whatever professional fields might be involved in the topic. So, I have a list of guidelines for how to identify and reach out to subject matter experts during that research phase.

All of this stuff is my way to make it easier for the people I work with to do a great job. It's a culmination of all things I've learned writing hundreds and hundreds of articles.

And that's what good team systems are all about. It's about taking all that knowledge you have and have worked so hard to attain and making it available to the people around you so they can benefit from it, too.

Some people want to protect all that knowledge and keep it to themselves so that only *they* can do what they do. But that's a really limiting way to operate, I think. When you share what you know and build systems around it, you can empower other people to be so much more successful.

That's how I like to think about system-building. I don't want to hoard my skills or my knowledge. I want to share everything I learn so that the people I work with can be even more successful than me.

Let's take a look at my personal boards. I think it might be helpful to see how I systemize my daily life.

If you haven't already, you should do the lessons on system maintenance. That's where I explain how to do several different kinds of recurring reviews to make sure all of your systems are working together in the best way possible.

And that's how I do things here. We'll start with my annual review board because that's where the big goals get set and all the details sort of flow downward from there.

So, a quick overview: I have an annual board—that's for the big goals—and a daily tasks board. That's it.

I do little check-ins weekly and monthly, but all the heavy lifting happens in the daily board. That's where stuff actually gets done.

Ok, so here's my current annual plan board. I was looking at it the other day and realizing I actually need to fill it out with some more things because I was a little too conservative. So, I'll be doing that at some point, but let's take a look at what's in there right now.

Everything you see on this board I came up with over the course of a week or so at the beginning of the year by going through my whole annual review process.

I keep the results of that process right here because Trello makes a great place for me to keep track of where I'm at with my different goals and systems over time and see how I'm performing and make course corrections.

There are 5 columns. The first is called goals / systems. It's pretty obvious what that is. It's where everything starts at the beginning of the year. I could also just call it the "not started" column.

You can see I also try to give each goal a due date that makes sense for it. That way it's a little easier to figure out how to prioritize what to do next when I check-in and make decisions.

Once a project is in progress, it obviously moves to the "in progress" list. You can see I have a lot of things in progress right now. That's kind of an accident. I try to limit the number of things I'm working on at any given time. Oops. It just sort of naturally worked out that way this year.

And some of these are actually on hold even though I've started them. So I'm not doing something for each of these every day. But sometimes it makes sense to work on different ones periodically because, at least right now, many of these are kind of interconnected.

And you can see that I have professional as well as personal goals and systems all together in the same place. I don't see any reason to separate them.

The next column is labeled "regular updates" and that's for any of my goals that are ongoing rather than one-time achievements that are, you know, either done or not done.

I have that list column split into two sections: “weekly” and “as needed.”

I try to write a quick journal entry just to capture my thoughts each week, so that goes in the weekly category. I just add a new comment with my journal entry on that card each week, so it all lives right here in the board. I don't have to go anywhere else.

And I did a really great job getting myself in shape last year, so this year I'm monitoring my diet and body fat levels every week to make sure I maintain that hard work and don't lose ground. I find that a really quick thing to do that's extremely helpful.

And I also enjoy doing 30-day challenges to try new ways of working or living or whatever. I'll do something every day for 30 straight days or not do something for 30 days. I keep a list of challenge ideas here to choose from and report on how each one is going and what I'm learning. What I like. What I don't like. Things like that.

Speaking of weekly updates, I do all my weekly reviews right here inside my annual board. That might sound confusing at first, but it makes a lot of sense for me and how I organize things. Since all my big goals are outlined right here, I find it easiest to keep track of them on a weekly basis in the same spot. Why split it up?

This way, at the end of the year, I have all my goals laid out and I can go through each one and see how I progressed on it on a weekly basis. Very simple and straightforward. Makes it easy to connect all the little wins and losses over time to the big picture.

But I also need to keep track of priorities and tasks on a daily basis, and that's too busy for this space, so I have a different board for that. We'll go over that next.

So then, of course, there's the “completed” column. Pretty self-explanatory. Once I've achieved a goal, it goes over here and I'll do a final review of it at the end of the year.

Finally, there's a column called “de-prioritized.” This is a newer addition to my system. I don't know about you, but sometimes I set goals in January that I just don't care about anymore come July. Or I still care about it, but I realize I need to set it aside for now.

You know, that's just how life goes. Before, I had no way to deal with that. So, stuff that I'd de-prioritized in my mind just kept hanging out in the “not started” or “in progress” columns and would kind of stress me out because that's not what those columns are for.

So, I created the deprioritized column to hold the goals that I set but am no longer working on. I could just archive those cards or delete them, but that's not really the best choice because I don't want to completely forget about them.

At the end of the year, I want to look at that list and see what's there so I can learn more about myself and do a better job of planning out the next year. So that's why I do that.

Oh! There's actually one more column, but it's not here right now.

At the end of the year, I'll create one more column called "not done" and anything I didn't finish will go in that one. It would be nice if that column never had anything in it, but... you know... let's be realistic.

And I'm in the camp that believes that if you meet 100% of your goals, you probably aren't challenging yourself enough. So, I'll create that list at the end of the year and use it in my annual review.

And there you have it. That's how I go from an annual review to actionable goals and keep track of them throughout the year.

Now, let's take a look at my daily tasks system. That's where things get a little more busy.

Alright, so this is my Grand Central Station. It's where all my systems come together in one place and I sort of manage them all from right here. I can look at this board and know exactly what I need to do today as well as what's going to be coming up for me in the next few days.

I have seven lists in this board. Each one has its own stuff in it and serves its own purpose. And I'll go over how I use each one. This is also where I use a lot of automation to speed things up and take care of repetitive tasks.

So let's just go in order here and I'll show you how it all works.

The first list is called "Daily Cards" and, as you can see, there's a card for each day of the week except for weekends. There's just one card that captures all that.

This is my repetitive work. I put all the stuff that I need to be consistent with from week to week in these cards to make sure I don't forget anything. It's a more visual way to manage a bigger picture routine.

So, let's take a look at Monday. I have 11 things I need to do every Monday.

When you go into the card, you can see I have 2 separate lists. One for personal tasks and one for business or work tasks. This is the stuff that I need to make sure I do every Monday in order to be consistent and successful. This is organized the same way for each day, but there are different tasks each day.

So on Mondays, the important personal things for me to do are to exercise. I try to do that in the mornings, but I don't *always* get to it first thing in the morning, so I have it written down here to make sure I check it off before the end of the day.

I need to complete my morning routine. I have it memorized now, but there's a card for it inside this board so, if I ever forget or something, I can click over there and remind myself what needs to be done.

Then, on Mondays, I run The Captain in our kitchen, living room, and dining room. So, The Captain is our nickname for our robot vacuum. We call it that because we used to call it Captain Ron, who was a movie character. And Captain Ron was kind of a drunken, disorderly pirate sailor. Anyway, it's a long story. Our robot vacuum is basically a drunken pirate and we call it The Captain. So now you understand...

Okay, moving on!

On Monday mornings, I like to update my annual plan. That's that weekly check in that I talked about earlier.

And when that's done, I use whatever I learn from that little review to set up what I'm going to work on for the week.

And I just check this stuff off as I go so that, hopefully, by the end of the day, everything's done.

And the garbage collector comes on Tuesday mornings, so I have a reminder to put the trash out by Monday night.

And those are the repetitive personal things I need to do every Monday.

For business stuff, I like to create two new ideas or pitches for the emails that I send out on Fridays. This link will take me to a little publishing board—a little bit like the editorial command center—where I manage those emails.

And, of course, I have to write the email every week, and I break that up into multiple tasks. So, on Monday, I do step one of the process. That link will take me to a

checklist where all the steps are broken out. When I finish those steps, I come back here and check off that item.

I also try to get a little bit of regular writing or content done as well as work on my products and make progress with marketing every day, so that's what these two items are for. And then I like to remind myself to check in or reach out to someone in my circle.

I'm pretty introverted and can naturally go long periods of time without talking to anyone and be perfectly happy about it, so I like to remind myself a few times each week to send an email or a text message or just do something to reach out and start a conversation with someone so that I don't turn into a total hermit.

And then, once all these things are checked off, the recurring work for the day is done. And that's the goal for the whole week. If everything goes according to plan, all the cards in my daily tasks list will be nice and green just like this one by the time the next week rolls around and it all starts over.

Of course, it's not unusual to miss something here or there. And I don't beat myself up about it when it happens. I just kind of roll with the punches because I can't be perfect every week. What I do, though, is try to pay attention to repeated misses. If I notice that I miss the same thing over several weeks, that's a sign that I need to look deeper at why it's getting missed and what I need to do about it.

So let's look at the Today and This Week lists. It's good to have your routines figured out and taking care of the stuff that needs to happen every day and every week, but I also need to be working on other one-off projects that come and go all the time.

That's what these lists are for. Like I mentioned before, I start the week by doing a weekly review on my annual board. From there, I put some priorities into my list for "this week" and then I try to space them out with due dates and visualize how I'll finish them in a week.

I mentioned in the course that it's best not to have more than one or two priorities on any given day, and I try to stick to that here as well. So, sometimes I have to let go of some tasks and just decide I won't get to them this week in order to get what's really important done.

You can see on my weekly list that there's a separator at the bottom where I put "ongoing projects. Sometimes I need to have a place on my daily tasks board where I can see a lot of little tasks related to a bigger one. Something that will take longer than a week to get through.

I could probably get a little more organized and keep this on my annual board, but I like having active stuff on my daily board. So, you can see right now that one big project I'm working on is a basement remodel. I'm doing little things here and there for that every day, and that card holds a list of tasks that all add up to completing that project. But it's going to take awhile to get through it.

I don't like to be working actively on cards that I can't move to done quickly—it's just something that keeps me motivated and makes it feel like things are moving. So, what I'll do is, as I'm ready to work on the basement remodel—or any project that has a lot of sub tasks—I'll break out one of those sub tasks into its own card and give it a due date this week. For instance, this week, I was building a little lumber rack to go on top of my car so I can transport building materials back to my house more easily.

Eventually, once I finish all the subtasks, I'll archive the bigger project.

That's just how I kind of keep tabs on bigger projects that are getting regularly updated throughout the week.

Now, the Today list—which is just to the left—is where I move cards that are, well, due today. This list is kind of superfluous. I like to have a list where all I look at is what's due today. I could also accomplish that by arranging the list for This Week by due date. Or I could use Trello's built in filtering tool to filter everything that isn't due today out of view.

See how everything except for today's tasks disappear? That's another way to do it.

But I like my way. It works for me. It's not better. Just different. It's just what I'm used to.

And the done column is just a placeholder. I move stuff there when it's done and it stays there until the beginning of the next week so I can look back and get a visual reminder of what I accomplished that week. That's nice to have on those weeks when you feel like everything was a struggle because you can look and see that, yeah, actually you got some good work done.

It's good for the opposite, too, I guess. When you feel like you were awesome but actually didn't achieve much. Keeps you honest with yourself!

So that kind of gives you some insight into how I manage my to do list throughout the day and then throughout the week.

But there are some other recurring things that need to happen once in awhile, too. More like once a month. I have a little system for those, too. And it's right here. This list is a placeholder for the things that need to get done monthly.

There's a card called "Monthly Closeout"—that holds all the little business things I need to do—like bookkeeping and paychecks and reporting. That kind of stuff.

Then I have a bunch of other things—both business-based and personal—that need to happen each month. There are too many of them to do all on one day, so I break them up. I do a few of them on the first weekend of the month. Then I do some more of them on the last Friday of the month and then the last weekend of the month.

That way I never spend too much time all at once doing recurring tasks. That would drive me a little crazy.

And then there's this other list called Routines. We looked at that a little bit already. This is where lists and routines that I need to reference at different times live. These are things I didn't want to build big, standalone systems for, so I just put them here because this board is where I'm most likely to be when I need them.

Alright! Now for the last little piece of the equation. The automation! I think this is really fun. I don't do anything crazy here, but this list here at the end is called Butler because I use a bot called Butlerbot to automate a number of different tasks.

Butlerbot is another free tool that was built to work with Trello. It's website is over here at butlerfortrello.com.... Automation is easy with the most powerful tool for Trello...

So, Butlerbot is what I use to automate a lot of the admin stuff that needs to get done—moving cards around, reminding me to do stuff, resetting checklists, archiving things. That kind of stuff.

So, let's just quickly run through the automations I use and I'll kind of demonstrate what each of them does and how it's helpful to me.

So, the way this works is that you just create a card, and the title of the card is a command. You just tell Butlerbot in plain english what you want it to do, and it will tell you if it understands you or not.

So my first one here just says every month... on the 5th...create a new card... with the title "Monthly Closeout" in the list "Today."

Pretty obvious what that does, right? It waits until it's the 5th day of the month, and then it just creates a card over here in my Today list with that title. And what that does is it automatically reminds me to do all the steps on the monthly closeout list. That way I don't forget.

And you can see the next three cards in the command list are kind of the same. It creates a "to do" for me on the right days in my "Today list" so that I'm automatically reminded to do that monthly work and I don't forget.

Now the next command is just a shortcut. When a card is moved into the Done list, it marks it complete.

So, when you give a card a due date in Trello, you can check it off when you complete the card, and the due date turns green to indicate that you met the deadline.

I'm too lazy to do that, so I just make butlerbot do it for me. It's watching the Done list and it grabs anything that goes in there and marks it as done so I don't have to.

The next two commands are also little shortcuts to make things easier and save a little time.

This one says, "Every Monday, archive all the cards in the list 'Done.'"

That just cleans up the done list each week and empties it out so that I can fill it with new stuff from this week.

And then the last command... it just makes a copy of the Daily Tasks list. So, each new week, I need to start over with this daily tasks list. Remember, this is my recurring work. It needs to get done every week.

But if I did a good job last week, then everything is checked off. And I either have to go back through each card and uncheck everything to start over—which I would never do because who wants to do that?—or I can copy this list and create a new one. When I do that, the checklists on the new list are all unchecked, and I can start fresh. That last command just does that copying task for me. It does it every Monday morning right when I need to start the week off.

It's also good to have a copy of the list to start the new week on because—let's be honest—sometimes Monday rolls around and I haven't checked everything off of last week's list. This way there's a separate record for last week and this week so that I can spend Monday morning finishing up last week's checklist without messing up this week's.

When I'm done, I can go ahead and archive last week's list and just start over. And the cycle continues!

Alright, that's a pretty good overview of how my most frequently used systems work. Like I said, I'm always tweaking this stuff to try to make it better. And there's always something broken that needs to be fixed. But, in the end, I am much more productive with it than without it, and it brings me a sense of calm to know that I have a sort of command center that will steadfastly show me what to do no matter what's going on elsewhere in my life or what other things might come up. It keeps me from dropping balls that I don't want to drop.

I hope you found it helpful to go through this, and I hope it gave you some ideas for how to start organizing your own systems.

Good luck!