SPI 256

Productivity and Frameworks with Mike Vardy from Productivityist

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Pat:	This is the Smart Passive Income Podcast with Pat Flynn, session 256. Let's get productive. Here we go.
Announcer:	Welcome to the Smart Passive Income Podcast, where it's all about working hard now, so you can sit back and reap the benefits later. Now, your host. He once wore Nike and Adidas clothing at the same time. Pat Flynn.
Pat:	What up, everybody? Pat Flynn here. Thank you so much for joining me today in this session of the Smart Passive Income Podcast. We're continuing our theme of the month here in March of 2015. That is prioritization and productivity. We're going to continue you that by talking with Mike Vardy from productivityist.com. That's spelled productivity, I-S-T, .com. He is somebody who, ever since I started learning about him and what he does, who I considered to be a master of productivity. He teaches other people how to teach other people and their clients how to be productive. This is going to be a great episode.

I learned a lot while talking with Mike. I actually got to meet him in person quite a few times in the past, and I didn't really know what he did until I knew I was going to be interviewing him. Then upon doing research I got really excited. Actually, at the beginning of this episode I learned that I'm doing something myself that he teaches other people too, which was nice confirmation for me that I'm sort of doing things the right way. You can begin to understand how you can make progress on projects, you can say yes or no to the right things, how to make sure you're saying yes to the right opportunities, how to balance things so that you're not getting overwhelmed. There's so much gold information in this episode. I think it's going to be one of those episodes that I refer to time and time again in the future. Here he is. This is Mike Vardy from productivityist.com. Make sure you stay until the end, because he has a cool, little freebie for you. Here he is, Mike Vardy from productivityist.com.

What's up, everybody? I'm so happy to welcome Mike Vardy to the show. Mike, thank you for joining me and everybody else listening today on the Smart Passive Income Podcast. Thanks for being here.

Mike: Thanks for having me, Pat. I really appreciate it.

Pat: I'm super stoked, because your business and your website, it's called productivityist.com. I highly recommend everybody go there. I think productivity is one of those topics that we all could obviously use some coaching and some help on. It's something that we're always focused on too, because there's so many tools out there. There's so many methods. I want to dive into this topic and ask a pretty hard question to answer. That is how do we best approach the work that we do to be the most efficient person possible? Let's just start there, and then we'll see where it goes.

Mike: Sure. That's a big question to unpack, but we'll start there. I think that one of the big things that people do when they're trying to get all the things done that they really need and want to do is that it's important to give your brain a break and give yourself these way points that your brain can connect to. That's how I teach productivity. When I teach productivity I want to personalize it as much as possible.

       One of the things I do is I recommend that people, they theme more of their days, and their weeks, and their months, and things like that. That way when they start off their work day, instead of saying, "Oh. It's Monday. Let me look at the list of all the things I need to do," and it looks like a giant laundry list, they instead have a theme for each day that says Monday is administrative day. Okay. Let me look at all the administrative tasks that I need and want to do. You're segmenting your list down so that instead of giving your brain a way into that resistance mode, if you ask yourself, "Hey. What do I need to do next?" ah, man, that list could be infinite. If you say, "Well, it's Monday. Monday's admin day. Well, what do I need to do in that category?" ... I think it's really important to start to segment your to do list and your tasks.

       Again, using your calendar and a task management application or a day planner in tandem is a real great way to do that, because again, your brain can only hold so much information. Your brain is meant to be the idea generator. I throw this phrase around a lot.

Your mind is meant to be a factory, not a warehouse. If we start to really kind of keep all these things in our head and don't have these quick triggers that our brain can look to to say, "Oh. Here's the path forward," we're going to struggle with moving things forward. I think that that's one place that I like to start, and it works with a lot of the clients that I work with, and it works for people that are from the stay at home parent to the CEO. Everyone's going to have their own personal approach to it, but if you start to break things down and give you these triggers, you can go a long way.

Pat: I really like the theme idea, partly because that's what I use. I didn't know that that was like a way to do it, until I started doing it. I was like, "Wow. This actually is helping me with my approach to each day and deciding whether or not I had sort of … I end each day considering if it was a win or a loss. That's been really helpful for me too, and having it be around a certain theme helps me achieve a win more often every single day. I'm glad you started with that, because I think that we all have so many things going on.

Let me give you the overview of what my themed days look like, just so you know. I think I've shared this on the podcast before, but a good recap for everybody just in case. Monday. I approach Monday as my writing day. My team knows this. I know this. I go in and I open up a Google Doc that's already ready for me, that is something that we had decided I was going to write a while back, because we had these planning meetings, and we look ahead in our editorial calendar and what not.

The thing that I was working toward in 2016 was I want to get rid of as much of that time as possible where I'm thinking to myself, "Okay. What do I do now?" That is just such a time suck, and it makes me feel depressed when I get into that mode, because I feel like I'm wasting that time, and I'm taking that time just away from my business and things I could be doing, but also time away from my kids. That's a big motivator for me. Now, even when I write I go in, open a Google Doc, and I can see and have a starting point already. I already know what blog post I'm writing on Monday. I already know a few of the major points and things that I want to cover

in that blog post. Again, I'm no longer thinking, "Well, what am I supposed to do now?"

Mondays are my writing days, whether it's for my blog, or emails, or guest posts, or whatever. Tuesdays are my recording days. That's podcasts, you know, interviews where I have people on my show, or I record solo episodes, or I schedule when I'm on other people's shows on Tuesdays too. Wednesday is my meeting day. That's when I can only allow myself, unless it's like an emergency, to meet with people. I have team meetings that day. I have meetings in person or lunches schedules on that day if people come down to San Diego. That's sort of my meeting day, and that's all I do. Then Thursday and Friday are like clean up, in case I missed something or whatever. That seems to work out for me. Do you practice this as well, and what do your days look like?

Mike: I do. Actually, I do it for all seven days of the week. The reason is because, again, your brain can connect to ... I'll start with Sunday actually. I start my work week on a Sunday. Sunday is my planning day. When I wake up on Sunday morning, again, I have that same thing that you have. I have this path forward. I'm like, "Okay. Well, Sundays my planning day." That's when I do all of my planning, all of kind of my deep planning stuff. That happens on Sunday. Monday is my admin day. To clarify, and I think you've done this as well, when you're starting to theme your days work from your certainties backwards. In other words, if you know that your kids are home from school on Saturday and Sunday, you're not going to make it a recording day, because that'd be absolutely ridiculous. When you theme you should work backwards from the things you know. Then you fill in the blanks afterwards.

Monday is my admin say. The reason it's my admin day is my wife is a partner on the business. She's home with me that day, so we do a lot of the finance work, and stuff like that, and any administrative work we need to do. Tuesday is my writing day. That's because, like you, I want to get that stuff done early on in the week, and then I can do more deep work later in the week. We'll get to that in a second. Wednesday is my audio/video day. Like you, it's kind of

my recording day. I do a lot more audio than video, although I am exploring more video in the coming months. I design that day to strictly go around that.

What was interesting is that when my son was out of school I was watching my son from home. Wednesday used to be my daddy duty day, because he wasn't in daycare that day, and Friday was my audio/video day. Well, once he went to school I would get to audio/video day, which was now Friday, I'd be exhausted. The reason is because I was never working six days in a row before that. The nice thing about themed days too is you can move them if you feel it's not working. Instead of trying to move a whole bunch of items, you just move the day and the items will follow.

Thursday is my training day. What that is is it's training myself, so any self-development I want to do. My wife is also home that day, so she's learning more about online business and stuff, so I help her with that. I do a lot of reading that day. That's what I use for Thursdays. Friday is my deep work day. I generally have no, again, unless it's an emergency or something happens, I have no meetings scheduled that day, nothing. It's just deep work. No social media. I'll have scheduled stuff in advance. I dive into the deep work throughout the course of that day.

Then Saturday is my family day. You might think, "Okay. Wait a minute. There's only one family day in there." True, but since my wife works Tuesdays, Wednesdays, and Fridays … She's an acupuncturist, so she works out of her office there. On Tuesdays, Wednesdays, and Fridays my kids are out of school at 2:15/2:30. I'm giving them nine extra hours during that time. I kind of categorize that time as family time. My work day is done at 2:15, so I kind of take it from there, and that's how I've done it.

One of the things that's really interesting for people who … If you don't think you can theme your days … You and I have a lot more flexibility, because we run our own businesses, but there's other people who have the nine to five jobs. They say, "All my days are too dynamic." It's still important to theme your days, because what about

before you go to the office? What about when you get home? If you want to move things forward, whether it's for a side hustle you might be working on, or maybe you just want to have a more fulfilling life in general, theming those days, even though your nine to five might be more dynamic, and you don't feel you can do that, it's still something you can tether to, and move forward, and be more productive.

Pat: Right. One thing that I've done on the personal side of things recently, in terms of theming, is I've been meal prepping. On Sunday I spend a couple hours going into the grocery store, coming back home, cooking everything that I'm going to be eating for the rest of the week, and that's been really handy too. Yeah. It's not just work related stuff. It's all the stuff that goes around with whatever's happening in your life. That's awesome. I want to ask you how did you get into teaching productivity? I'm curious. We gave everybody a quick win right now, theme your days, which I think is a huge one. We'll get into some more tactics and stuff. I'd like to also dive in … I know you do a lot of client work and help people with productivity. I want to dive into that. There's also this, like we talked about right before the show started, something about your book, which is really interesting. We'll get into those things, but really quick, what's the story of Mike Vardy? How did you get started with all of this?

Mike: Well, I was working at Costco. I worked at Costco for 12 years. I used to live near Toronto, Ontario. I moved out West to Victoria, BC, which is where I live now. I was working for Costco at the time. I was a manager. I was managing two different areas of the building. If you've ever been to a Costco, you know where the hotdog place is, the buck 99 hot dog.

Pat: Yeah. Totally.

Mike: Yeah. I opened that department. I was the manager of that department, but I was also the manager of the area that sold the rotisserie chickens, which is at the exact opposite end of the warehouse. The reason I had to get into productivity at that point in time, and there was no real digital tools that you could use, I was using day planners and stuff, is because the hot dog stand is

all impulse buys. People are not going in there to plan on buying a hot dog and pop. They happen to do it more often than not, but it's more customer service oriented, whereas working in the service deli it's more merchandising. It's more planning, making sure you have enough food out for people, not so much front facing stuff. I had to try to switch modes between being the customer service person versus the merchandising person. I really had to unpack that stuff. That's kind of where it all got started. Then, during my stay at Costco, I got back into comedy, which is what I did in high school, and I was going to go to theater school after it.

Pat: Comedy? Like stand-up?

Mike: Yup. I did improv, sketch, and stand-up.

Pat: So cool. Dang. That's awesome.

Mike: I got back into improv with my roommate. My roommate and I, we joked a lot. We'd invite people to our house and we'd put pictures of each other on each other's bedside tables. We wouldn't allude to anything like that. People would walk through, and they'd look, and we'd watch the facial expression of people as they walked in the room and go, "This is a really ... Oh." It's like, "What?" We would do funny stuff like that. He said, "You know what? You should come to this improv class." I did, and I was hooked. That was it.

Pat: I'd love to do that.

Mike: My career at Costco started to shift. I was trying to now manage a comedy career, and Costco, and plus I had just meant my wife, so I was dating. I was trying to do all this stuff, so I started to study like the David Allens and the Stephen Coveys. I bought the Tony Robbins Time of Your Life stuff. I was right into all that stuff. As I slowly made my way out of Costco, I went from being a full-time manager to a part-time door greeter. When I was ready to make the jump into working online, I didn't outright quit, but I did something that no one had really heard of there. I said, "Oh. I was a manager. Now I just want to be the guy clicking at the door." It freed my mind

up to work on the productivity stuff.

I was doing productivity comedy initially. I was doing a productivity parody site. Initially is was called F-ing The Dog, which was a parody of Getting Things Done. It was FTD, instead of GTD, and Getting Things Done is the David Allen methodology that I'm sure some of you might know of. I started to interview people, like Seth Godin, and Jonathan Coulton, and David Allen for a podcast that I had. It was called Eventualism. David Allen's people said, "Hey. You know what? You're pretty funny with this stuff. You're satirizing it, so you must know a lot about it. Would you like to write for the Getting Things Done Blog?" I said, "Sure." They said, "Just don't make fun of us." I said, "That's fine. I can do that."

That started me down the path to becoming the productivity specialist and then eventually strategist, which is where the term Productivityist came from. I became the very thing I was parodying, but it was a long ... I mean, you've seen that diagram online where it's like, "The path to success is not a straight line." You know, this was not what I imagined I would be doing at. Now I get to do this stuff. I get to perform on stage. I've spoken at the same events. That's something I've wanted to do with comedy. I worked in improv. I did stand-up. My sketch troupe performed at San Francisco Sketch Fest and DC Comedy Fest. We did a lot of that stuff. I got to marry the comedy career. I don't know if you know this, Pat, but you don't make a lot of money doing comedy. It's not something you can generally make a lot of money doing versus now I get to help people, entertain them, inform them all at the same time. That's kind of how I got to where I am now.

Pat: Nice. Well, thank you for that Costco-sized sampling of your life. Bam. Terrible. I'm sorry, everybody. Anyway, that's super cool. I didn't even know that back story behind all that. Now, again, Productivityist, so productivity, I-S-T, .com is where you can find Mike Vardy. Mike, how would you define productive? What does that really mean to you?

Mike: Productive means, to me, the term productivity is intention plus

attention. That's how I look at it. A lot of people will say efficiency and effectiveness. I think that the way you want to be productive is you have your intentions, and you want to make sure you have ways to pay attention to them. One of the things a lot of people do is they pay attention to the wrong thing, so their intentions never get move forward, but then you're not really being productive. If you have all these intentions, but you're not actually having a way, like a framework, like we just talked about, the theming of your days, to pay attention to them, then you're not moving those intentions forward, so you're also not being productive. To me being productive means marrying your intentions with the right amount of attention.

Pat: When you work with clients, what is the number one thing that is holding them back from being productive in that definition?

Mike: They are overwhelmed by the amount of inputs coming at them, so email, assignments from other people, possibly even the environment that they're in, a lot of meetings, things like that. They're feeling overwhelmed, and a lot of them are using their email inbox as a way to manage their tasks, which is one of the worst things you can do. A lot of them are just feeling that they don't have control over their day, and so they let that go. They say, "Well, you know, I've got this job. I'm working nine to five. I guess this is just the way it is," and it doesn't have to be that way.

            When I work with them I show them, "Hey. Whether you want to just get through today," which is where you start with the idea of the daily map, which is one of the aspects of the NOW Year Method, which is what I teach, "Or you want to have the bigger vision where you talk about the three words for the year, and then you go into monthly theming and stuff like that, I can work both ways with clients." It allows them to say, "You know what? I can deal with the things I need to do. I can decide on the things I ought to do and ought not do, and then ultimately do more of what I want to do." It involved putting some frameworks in play, because frameworks are what foster freedom more than anything else.

Pat: Yeah. We talked about the frameworks and the framings of the

week already. I was going to follow up what you had touched on this already with it's great to kind of come up with this framework, but in the day to day we get bombarded, like you said, overwhelmed with all the other people's attention that they want from us. How do we even start to balance that? There's so many things. Where does one even start to begin? Is it simply cutting one off from certain things, or is it actually theming when you answer your emails and allowing other people to kind of poke at you when they need things? How does that all work?

Mike: It's all dependent on, obviously, the situation. That's why I teach personal productivity, because there's a lot of people that they feel that the pull of email is just too alluring for them based on the work that they have, but email's a great place to start, because you said do you block out time to answer email? I would say yes. You have in your task list I'm going to check email at this time, and this time, and this time, if you can do that. If you can't do that, then there are tools out there that allow you to delay the sending of emails or delay the ... Say I've got one client, for example, who deals with email throughout the day, but only sporadically. Then at night they go home, and then they answer all the emails that they need to, but they use a tool called Boomerang to send it out at the next morning.

The reason they do that is two-fold. Number one, they can have the focus and attention to deal with the emails responsibly at that time of night. They're not getting overwhelmed by all the interruptions. Number two, they're also setting a boundary to say, "Hey. Even though I'm answering this email at 8:00 at night, I'm sending it at 9:00 in the morning, so that way Bob on the other end doesn't see that you sent an email at 9:30 at night and figures that you're available at 9:30 at night any time." There's a lot more messaging in communication than just ...

Pat: Oh. True. I didn't even think of that.

Mike: You know what I mean?

Pat: Yeah. I was considering the fact that Bob might not even be awake

at that time to receive the email, and then it would get lost.

Mike: There are a lot of people I work with where they are literally addicted to email, and they will answer email at 11:00 and 10:00, even earlier. Plus there's time zones. If you're working online, like we are, you've got people that are in Australia or the other side of the world that are up at the time that it's 11:00. I know you used to be more of a night owl, like I am now. I'm a night owl. If I send emails at midnight and I send them at that time, I'm going not have people responding. It's about setting those boundaries. I think that's ultimately what you want to is is you want to assess your situation. That's what I do with clients is say, "Okay. What are acceptable boundaries?"

One client I worked with yesterday, he checks his email, but what he does is he has three blocks of time that he'll schedule his emails to go out. If he answers an emails at 8:00, he actually has it scheduled to go out at 10:00. Then anything after that first email check will go out at noon, so he has this like different schedule, so that way he's able to deal with the flow of email that he has coming in. Another thing that I've worked with with people is, look, your inboxes, they're overflowing in a lot of cases. Again, we're focusing on email here in particular. A lot of people just leave things in their inbox, which is basically like saying, "I'm not going to bother opening it." It's a big mystery every time you open up your email.

All I've had clients do, just like we do with themed days, is I had them create seven folders, one for each day of the week. Maybe if they don't answer emails on weekends, one for each week day. All they do is they look at their email in their inbox and say, "Am I going to deal with this now, or am I going to deal with it later?" If you're going to deal with later, okay. Am I going to deal with it this week? If so, what day of the week am I going to deal with it? You drag it to that day. It's getting more deliberate and intentional with these kind of inputs, so that way you're not spending more time say examining things. You're actually spending time executing. I think that's what a lot of the clients I work with ... They end up going from that examination phase, like just spending time looking, and actually go into the execution phase.

Pat: Nice. One of the things that I love is when I can feel that rhythm and that flow, you're just in the groove and things are going well. There are, like we just talked about, bad interruptions, things that we're like, "No." We know immediately that this isn't something we should be doing at the time when we should be doing something else. Then I think the more evil of the interruptions are the good interruptions, such as new opportunities. For example, you have these themed days, and things are going well, you're in the rhythm. You've been working hard. You've been producing. All of a sudden it opens up new opportunities, which then actually get in the way of that rhythm, and then actually you start to decrease your productivity and efficiency.

How does one even deal with that? As we're trying to improve, as we're trying to get better, and for obviously people who are listening to this, they're building their businesses. They're getting more exposure, building their authority. That's going to open up new opportunity, which are great, but not everybody should latch onto those immediate opportunities all the time. How do you help people balance those opportunities that may actually get in the way of the things that we should be doing?

Mike: That's the great thing about theming your days. That's why I love that, because it also lets you deliberately delay those things that are on those themed days. For example, if today I get an email from somebody that is a great opportunity and today is my deep work day, I'll obviously answer emails on those days, but what'll happen is that's an interruption in that day. If I take the time to take care of that, then my question once I'm done dealing with that isn't, "Okay. What now?" It's, "Oh. Okay. It's Friday." Let's say, "It's deep work day. Let me get back into the deep work stuff." I think what people need to do is if they have these good opportunities that come along is, yeah, you're going to have those interruptions that come up.

Again, there's another type of theming called horizontal theming, which those of you out there who like to schedule every moment of the day, which I am not a big believer in, because again, when those opportunities, or those distractions, or disruptions come along

they can completely derail your plan. Horizontal theming would be, "Okay. I'm going to block out from 9:00 to 11:00 to work in communication, and from 11:00 to 1:00 I'm going to work on writing," so you can go horizontal with it. What happens is that if you have these interruptions that come up, at the end of the day, like you were talking about, Pat, you can see, "Okay. Today was writing day. Oh. I got all this writing done today, but there's three bits of writing I didn't get done today. I guess I'm getting it done next Monday," in your case. It allows you to have a place to put it, instead of you going, "Okay. I'll do this tomorrow or the next tomorrow," and then all of a sudden the tomorrows pile up.

Another tactic that I teach people, and I think this helps with those good opportunities, is a lot of people work by project. That's how we've been trained to work is we get into a project, and when we work by project it's kind of like if you were to go meal plan. You plan your meals for the week, like you said, on Sunday. It would be like you going into the grocery store and shopping by day of the week, as opposed to by department of the grocery store. You're not going to go to the meat department five to seven times. You're going to go there once and gather everything up. Same thing with produce. Well, when we work by project, we're doing the thing that you would never do in a grocery store, because you're going to pick up the phone and call somebody. Then you're going to write a blog post. Then you're going to send an email. Then you're going to jump into ConvertKit and add a newsletter or whatever.

You're going into all these different phases, whereas if you worked by mode and you say, "Okay. My themed day is writing. Oh. I'm feeling ..." Let's say you're feeling you've got low energy, and I've got five different categories of modes. We can talk about that a little bit here or a little bit later. You can say, "Okay. I'm feeling rather drained right now. I'm feeling low energy. Okay. Let me look at all the low-energy things I can do that are in my writing themed day." Maybe that's when you're going to send emails or do social media. You give yourself, again, these way points, so that your brain can connect to these things quickly.

That way when these opportunities do arise you categorize them accordingly, and you can say, "Oh. This is a new … I'm going to call this a new opportunity. I'm going to label this new opportunity mode." You can actually schedule that or you can block time out for that, depending on the day of the week that you want to focus on it, based on your theme. It does scale out, but I think that that's what happens is a lot of people, they get caught up, and they don't have a plan for their day. Then when these disruptions come up, good or bad, they have no way to bring themselves back to what they were doing in the first place, and because of that, they don't feel that they can take advantage of those opportunity, should they come along. Better yet, they don't know what to say yes or no to in the first place.

Pat: Yeah. Let's talk about that really quick. I think that's a really important thing. Actually, I know you recently experienced something where you had said yes to something that was actually getting in the way of things, even though it sounded like it was one of those good opportunities. What I'm talking about is Mike was actually asked to write the book on productivity, literally, but by a company out there that produces books on various topics. You can probably guess which one that might be. Tell us how that went and why it's not going anymore.

Mike: I was approached. I was basically handed a book deal. I've worked for one and I have published books before, but this one was kind of just it fell into my lap. I was flattered, and I thought it was a great opportunity. I weighed the pros and cons. The pros definitely outweighed the cons at first blush. I didn't take the time to disconnect and assess everything else I had going on. Productivityist is growing. I've got a family. My daughter's playing sports now. There's a lot more stuff going on, a lot more moving parts. I made the decision to write the book. It was a very accelerated timeline. With this series it generally is. As I got into the process I found that other things started to fall by the wayside. You noticed this too. It's actually funny. Our mutual friend, Chris Ducker, talks about burnout. I saw the signs of it happening, but, you know, you don't want to let anybody down.

Pat: What were those signs?

Mike: I was getting flustered. My themed days were falling apart. Again, if you have a framework in place and it starts to fall apart, you know that you've put too much in there. You just know. We'd been trying to bring on somebody to help for a while. I kept pushing that off. I kept pushing off those things that were going to have higher yield impacts down the line. I wasn't critically thinking well enough. I was cranking widgets more than anything else. I was basically pacing around.

I was doing a workshop in Cincinnati. There was a bunch of stuff going on in my head, and I just basically stopped and said, "I can't do this anymore. This is just too much. The timeline's too accelerated. I'm not enjoying the process of this." I just turned around and I called my wife. I made one mistake, which is when I quit Costco I actually quit without telling my wife initially. It was fine. It worked out, but that's a lesson learned. You make decision with your partner. I called her up and I said, "This is how I'm feeling." She said, "You know what? I'm seeing it affect you on a wide array of scales." That's another thing you should do is ask people around you.

Pat: Totally.

Mike: She basically called me out. Then she reassured me. She said, "Look. We don't need this. Things are working out really well. This is not the book you want to write, if this is how it's working for you." I rescinded the deal. I backed out, advance went back, all that fun stuff. The weight was off my shoulders. Everything started to get back into the groove, not a routine, but a groove. I think there's a very big difference between them. Yeah. It was a lesson learned. I probably won't get a deal with that particular company again, but lesson learned. One of the things that I didn't do … There's that old adage, you teach what you need to learn the most. In this case it was one of those situations where I should have stepped back and said, "You know what? No."

Actually, the default, more often than not, when you're building a business, especially if you've got a lot of moving parts and high

quality moving parts, is the default should almost be no before it's yes. Derek Sivers has written about this. I love Derek's work. The idea of if it's not a hell yes, then it's a no, that's the kind of philosophy that I'm getting into my brain a lot more. Once you have that in there, then you start creating those boundaries. Like you said, on Wednesdays you lonely have meetings on Wednesdays. You create those boundaries using some tools. I use tools to do that, because I'm a people pleaser. I like to say yes. I like to help people out, but by having these tools in place it creates these boundaries, so I never have the opportunity to say yes or no. It's the tool that helped me with that. A lesson learned. Sometimes those great opportunities, you really need to take a step back and weigh them up against everything else that you've got going on, so that you can make the best decision for everybody, not just for you.

Pat: Yeah. Absolutely. You had mentioned tools. Are there specific tools that you feel people should be …? Do you mean things like apps?

Mike: Yeah. Yeah. Yeah. Again, I'm a big believer in self-automation first, so the idea of you and I theming our days, that's self-automation. You've got it in your head this is what happens. I think there's tools, like I love using AcuityScheduling for my scheduling, because I can go in there … You can use tools like Calendly. Any kind of calendar scheduler that you can use is helpful.

Pat: What's the one that you use? Wat's it called?

Mike: Acuity. A-C-U-I-T-Y.

Pat: I haven't heard of it.

Mike: The reason I use it is because we have other coaches that we're working with now that are teaching, because my client list has blown up, so we've got others that I've trained. We can all manage everybody within that. When we pay them and all that stuff we can see what they've done and block things out accordingly.

Pat: Oh. I see. Okay.

Mike: It's like Calendly or schedule ones, like those ones that are well known. I basically made it so that no one can book interviews with me to be on my podcast other than Wednesday. I never have to think about it again. Same thing with Tuesday. Tuesday is a day where I'm willing to take meetings with people, versus any other day of the week, so same thing. It gives you the ability, like that tool in particular, gives you the ability to block out stuff. For those people out there who are like, "Oh. I don't know. I like to have someone do it for me," or, "I don't like to send links off to people to say, 'Hey. Book a time,'" you're saving them time. Instead of doing the email dance back and forth, which is a waste of time, a massive waste of time, you just say, "Hey. Look."

You know, have maybe a couple of different responses. If it's somebody that you don't really know very well, you can be a bit rather informal, or rather, formal. If it's somebody that you know, you're going to say, "Hey. You know what? I just want to save us some time and energy. Here. Click on this link. You'll find a spot. It's automatically booked." I like to have it automatically booked, so that if they pick it, it's the one they get, "And I'll be there." Once you get past that initial fear of, "Oh. I don't want to seem like I'm too important," it really works out well for you. That's a tool I really love to use.

I'm starting to use tools like Zapier a bit more to automate, outside of … But I'm not a huge fan of having too many things automated, because if you have too many things automated, then the likelihood of them breaking, especially since they're reliant on so many services, like Evernote, et cetera, that can be a problem too. I'm a big believer in using a digital task manager for your to do list, because while paper is great as kind of a quick capture and get in front of your face kind of tool, long term storage for those ideas that you may want to approach 3, 4, 6, 10 months down the road, having a digital tool to do that is far better.

The one I use with my team is Asana. I'm a huge fan of that, and I use to do lists for my own personal stuff, so I have two of them. Again, just to make sure I don't miss anything, I actually have a task in to do list that says every morning to check Asana. I need to be that critical about it, because if I'm not that critical about it, then

that's when I run into issues.

Pat: Right. You need to be honest with yourself, for those of you listening, with what really you need help with. I think a lot of people often feel like they don't want to get these tools, because they feel like they can do it themselves, or they're copping out because they're letting a machine do it. Really, it's something that that can help you improve your life, because when you think about it, it's something less that you have to think about, so that you can think more about something else.

Mike: Yeah. There are things that I have in my digital task app like put up Christmas decorations. I have that repeating every single year, because the only other time I would think about it is if I drive by somebody's house and I see Christmas decorations, I'm like, "Oh. I should put those up." I never want to have to think about that stuff, like you said.

Pat: Another thing that I know from my own personal experience, both working nine to five and also as an entrepreneur, that is a really big time suck that is not productive at all, or it wasn't at least for me in the beginning, were meetings. There are books on how to do meetings well and be more productive with meetings. I'm curious if that's an issue that any of your clients run into. If yes or no, either way, I'd love for you to speak on how do we make meetings more efficient, because a lot of times it's just this boring thing that something happens. You feel like you just have to do it, because it's something you've just always done. You know, I'd love for people who are listening to this, especially those who are working nine to five, to maybe be able to share something with their upper management about how they might be able to run their meetings better.

Mike: Well, I think the one thing that a lot of people, when they're dealing with meetings, they are a huge time suck. One of the biggest things that you might want to do, and Jason Fried's talked about this in Basecamp, is to have standing meetings. I love the idea of standing meetings, because ... When I say standing I don't mean like at the same time all the time. I mean you're standing up.

Pat: Literally standing up?

Mike: Yeah. Yeah. Because people can only stand for 25 minute at a time, half hour. They're not going to be able to stand for a full hour.

Pat: Interesting.

Mike: Status meetings are some of the worst meetings, one of the worst meetings you can possibly have, because a lot of that stuff can be done without us actually having them happen in person. There's so many tools out there that can allow for them to happen. We have a product called Meeting Makeover where we dive into this a little deeper. John Poelstra, who actually produces my podcast as well, he's a meeting facilitation expert, and he's really good at this stuff … is an agenda. If you're going to go into meetings, they have to have an agenda, because if they don't, then you end up getting derailed like crazy. Having an agenda is really important and making sure that there's a deadline as to when things can be added to the agenda. There are, again lots of tools out there. There's Meeting Hero. There's Do.com. There's a lot of them out there that you can actually have agendas built in that anybody can access on the cloud at any giving town if you want.

            Then the other thing is to have somebody facilitate the meeting that may not necessarily be the person that's in charge. If you're in a large organization or if you're team, like you've got a small team, Pat, you can end up having somebody that says, "You know what? Hey, you. You facilitate this meeting to keep us on track." Whenever I have a meeting John always facilitates it, because he's really good at it, and he just keeps us on track. I think that that's another area that you want to make sure that you have somebody that keeps you on track, that keeps the meeting flowing.

            Then the other thing is minutes. Minutes are important. If you can record the meeting, and I know you're a fan of rev.com, I am too, record the meeting, if you're doing it let's say virtually, and then send it off to rev.com, or send it off to someone who can transcribe, and then have those meeting minutes … If you don't want to do them automatically, if you don't have somebody actually tape

them, you can have somebody actually transcribe and then edit them, so that way you have them to refer to later. Then post them somewhere where everybody can see them, whether again, maybe a Google Doc, or Evernote, or whatever you're using.

The thing about meetings, the other thing, is to make sure ... Mondays are a terrible day for meetings, and so are Fridays, so Tuesdays through Thursdays are the ideal days to have meetings, because Monday, first off, they're just getting back from the weekend. They're going to have a whole slew of stuff, yourself included. Then Friday, everyone's on wind-down. Tuesdays and Thursdays tend to be the best time to have them. Think about webinars. Webinars generally happen on Tuesdays and Thursdays, and sometimes Wednesdays, same kind of deal.

Again, keep them short, like 25 minutes meetings, half-hour meetings. There's a productivity methodology called Holacracy. I don't know if you've heard of it, but it's a lot of meetings. It's very meeting-heavy, but they're small groups and short meetings. It really, really works in that environment. Medium uses it. I think Square uses it as well. There's these little, tiny satellite meetings that happen more frequently, but they're driven, they're focused, and only the essential people are there at any given time. I think having those strategies in mind are key. If you don't need to be at a meeting, don't go. If you don't need to be at that meeting, find out if you even need to be there. If your presence isn't actually required, then just when you have minutes and you have a proper agenda and everything set up, you don't have to attend as many meetings.

I had one client, and he would sit in on every meeting. I said, "Why are you sitting in on the meeting?" He goes, "Well, I'm just sitting there. I'm doing other work while I'm sitting there." I'm like, "A, you're disrespecting the meeting, number one, and number two, you're meeting with these clients who ... You've got your subordinate, who is supposed to be handling a lot of the relationships with these clients, and if you're in there all the time, when things go a bit awry and you actually need to be in a meeting, the impact of the meetings you actually need to be in is lessened. I would make it so that you're not in any of the meetings unless you

need to be. Then when you show up to a meeting, everyone's like, 'Oh. This guy's here. We better … The heavy is here.'" You know what I mean?

Pat: Yeah.

Mike: It's about being intentional. Again, intentional, being intentional about what meetings you attend, and being intentional about how long these meetings are going to be, and intentional about what needs to be discussed, and then being intentional on making sure the stuff that gets discussed gets reported.

Pat: For everybody out there listening, the next meeting that you have, just be conscious. Think to yourself, "Do I really need to be here?" Maybe just stand up. Just stand up and set the example, whatever you want to do. Anyway, the last thing I want to talk about is, Mike, how would you tackle a brand new project that you're working on? What are some things that you can do before you even start working on that project to set yourself up for success? How do you put those kinds of things into your existing framework or schedule? What are some of the things you can also do to just keep yourself moving forward, especially when you start to do the work, in the beginning it's fun, but then over time you're like, "Man, this is a lot of work," and then you start putting other things in its place?

Mike: Yeah. For me, when it comes to projects one of the things I've done is I plan my year out well in advance. In fact, I start my new year in September, because I like to mirror it after the school year for the kids, because the kids are out in July and August, so basically my year starts in September. I'm almost halfway done with my year at this point. What I do is the way I orchestrate what projects I want to take on is I have what Chris Brogan calls the three words. I have to choose three words for every year. If I want to take on a project, before I actually decide to take it on I assess it based on the three words. Will it hit two of those three words? If it doesn't hit two of those three words, I just shelve it. Shelving it means not putting it in say to do list or Asana. It means leaving it in Evernote, like in the idea … I've got this idea bucket in Evernote.

Pat: Yeah. I have one of those too.

Mike: Yeah. It just sits there. Every time I do my planning for the year I go back in and review it. I have a task, again, in Asana that says review idea bucket. It only comes up once every six months or so, because I don't want to overwhelm … Especially when you're working with a team you don't want to throw, in my mind, these ideas that I have, I don't necessarily want to overwhelm people with them. A lot of the people that I work with initially don't know how to use let's say Asana or any of these other tools, and they just see this big mess of stuff, and they're like, "What does this all mean?"

The other thing I do is I theme my months in addition to the daily theming process. For example, if I'm doing online writing on Tuesday and I'm not sure what I'm going to write about, I look at my monthly theme, and I say, "Oh. This month's theme is this, so this is what …" Let's say I'm working on my NOW Year Course. Well, I'm going to write stuff related to the NOW Year Course. I'm always have these higher way points, and they go into Asana as projects, so each monthly theme has its own project. It's almost like a top level project, and then I have section headers that break it up. That's kind of how I assess it. That's how I work through it. Again, because I start my year in September, I'm probably about four months ahead in a lot of ways. It's kind of like how I deal with being a night owl. When people ask me, "When do you get the stuff that the early risers get done?" I go, "Well, I get it done the night before," because if I don't, then I'm behind.

For my monthly themes or if I have ideas that come to mind, I just basically do a brain dump of all the tasks that might be associated with it, because that's the only way you're going to get a sense of what's involved with a project. If you just put down, "Write book," well, that's not going to be really helpful. You know? Well, what do I want to do? I've gotten better at this, thanks to yourself and other people that are really far more experience in the online, like how to communicate and market better. The tasks I've had to add, like do a launch, I'm like, "Okay. Well, there's a 20 step process to that, which you never used to … You have to think all that through, because as a

writer or as a content creator it's not just, "I make content and leave it." There's so much more to it. That's kind of how I work through all my big projects, personal and professional.

I will sit down and I use 3M products to help me. When I'm actually mapping the stuff out, Pat, I've got these big, sticky notepads that 3M makes, and I actually write down the monthly theme on the top of each one of them, and I'm looking at this on a big wall. I write down all the things that could fall into that monthly theme. It kind of gives me a broad ... I take a step back, and I look at it, and then I bring it forward. I've got this, it's called The Big Idea Experiment or whatever, and it works out that way where I can see all the stuff. Then I capture it into the appropriate tool. If I know it's going to fit with two of my three words for the year, it goes in Asana.

If it doesn't, it sits in Evernote. I have a Spark file on Evernote that's deep, deep and long. That's where I go to find writing ideas. I mean, when I break down projects I think it's really important that you break them down to their smallest component, because then ... Then I attach modes to them of course. Like I was saying, I've got five different categories. If it's going to be something I work in ConvertKit, I have a ConvertKit mode. That means I do all the stuff in ConvertKit at once, as opposed to jumping back and forth. It's been an evolving process, but the biggest thing I can suggest to everybody is when you have a project ask yourself, "How big is this project?" If you have a task, ask yourself when you write down the task, like write book, that's not a task. That's a project. Break it down to its smallest components.

Pat: Man, Mike, that was awesome. Thank you so much for that. That's going to be very helpful for so many people, and it's a great reminder for me too as I move into the new year here. By the time people are listening to this it's going to be 2017, and they're probably going to be starting or hopefully close to starting their major projects for the year, so this will be very handy to them. Mike, thank you so much. Again, I'm sure we could talk for hours, and hours, and hours about a whole bunch of different things together, but obviously we want to be mindful of people's time too. Before we

go, where can people go and find more stuff from you?

Mike: Well, the best place to go for everybody listening today is go to productivityist.com/pat, because I talked about the categories of modes. I've talked about theme-based work. You'll get a primer on the NOW Year Method, which is the productivity approach I teach to clients and that others I've taught to teach to clients at this point. That's exclusive for you guys there. I'm also @MikeVardy on the Twitter and @Productivityist on Instagram.

Pat: That's productivity, I-S-T, .com/Pat. Cool, man. Thank you so much. I appreciate it. It's been a pleasure. I look forward to following up with you at some point in the future.

Mike: Thanks so much, Pat. I had a great time.

Pat: Thanks. I hope you enjoyed that episode with Mike Vardy from productivityist.com. That's productivity, I-S-T, .com. Again, if you want to check out that special offer, he has a free download to learn even more about his system, his framework, and all those kinds of things. Go ahead and go to productivityist.com/pat. Yeah. That's where you go. Also, if you want the quick and easy way to access all that stuff, just go to smartpassiveincome.com/session256. That's how you'll get to the show notes, the resources, everything mentioned on this particular topic. It was a great episode. Thank you, Mike, again. I appreciate your time and just sharing everything for everybody else out there.

I also want to thank today's sponsor, GoDaddy, for sponsoring today's episode. You know, they have a mission to radically shift the global economy. They've been helping millions of small businesses and independent venturists, if you will, with just giving them the tools they need, the people to transform their ideas and the insights, and obviously the ability to get cheap domains, which is really important, obviously. If you're getting a new business idea off the ground, you want to get that domain name and reserve it. You want to get domain names to forward to special parts of your website, especially if you have a podcast, or do any YouTube

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You know, it's March now. It's a time that we can start to check in with ourselves to see how we are progressing with the goals that we set for yourselves for this year. Do a mental check with yourself before we finish up. I just want you to do that exercise. Just think to yourself, "How well are things going this year at this point?" Are you actually doing the work required to meet those goals that you wanted to accomplish this year. If not, now is a good time, in March, to reassess, to readjust, to adapt to a certain new situations that come about.

I know what that's like, because I've got two kids, and I'm always having to adapt. Yeah. It's one of the best things you can do, that quick mental check in. Do that with yourself. Then use some of these frameworks that Mike talked about to help set yourself up for success for this year, because you've still got plenty of time to get things done. Keep up the good work. Take care. I'll see you in the next episode of the Smart Passive Income Podcast next week. If you haven't subscribed yet, please do that. If you haven't left a review, I would love one. I read them all. I'm just so thankful for all the support. I appreciate you. See you next week. Bye.

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